



Unicorn Asset Management launches first socially responsible AIM IHT Service

Product offering expanded to include Responsible Growth and Responsible Income portfolio options

[Unicorn Asset Management](#), an independently owned fund management business specialising in small and mid-cap companies, in partnership with WM Capital Management*, has launched socially responsible ESG portfolio options within its existing AIM Inheritance Tax (IHT) Service – the first of its kind in the market.

Investors in the Service can now opt for additional ESG selection criteria through the ‘Responsible Growth Focus’ or ‘Responsible Income Focus’ portfolio options.

In addition to following Unicorn’s company-wide [Sustainable Investment Policy](#), which focuses on UN PRI compliance and active company engagement, the Responsible portfolio options also avoid businesses that derive revenues from excluded activities, such as weapons and gambling.

Unicorn’s AIM IHT Service aims to provide IHT exemption to investors, after an initial two-year holding period, by investing in a diversified portfolio of 25 to 40 AIM stocks that are eligible for Business Property Relief and which qualify as ISA investments.

Unicorn has been one of the leading institutional investors in the AIM market since its inception in 2000. Unicorn currently manages almost £500 million directly invested in AIM-listed companies across its range of UK funds and its AIM-focused VCT.

Chris Hutchinson, Director of Unicorn Asset Management commented; *“While ESG investing has been widely embraced by the asset management industry, the Unicorn Responsible Growth Focus and Unicorn Responsible Income Focus IHT portfolios are the first to adopt these considerations within an AIM IHT service. We are therefore delighted to be able to offer these socially responsible ESG options for those who wish to align their investments with their broader social conscience.*

“Conducting our research in-house delivers important advantages when investing in AIM-listed companies, where we have the opportunity to offer meaningful support to high growth, but typically under-brokered and under-researched companies. We wish to maximise this opportunity within the Unicorn AIM IHT Portfolio Service, by providing investors with effective and efficient mitigation of their IHT liabilities without the time lag or complexities of some of the more traditional solutions, while also tailoring the Service to meet the growing demand for socially responsible investment solutions.”

To celebrate the launch of the Unicorn Socially Responsible AIM IHT portfolio options, the initial fee has been reduced to 0.5% (usually 2%) until the 30 June 2021.

This press release does not constitute investment, legal, tax or other advice nor is it to be relied on in making an investment or other decision. This press release is not a solicitation, offer or recommendation to acquire or dispose of any investment or to engage in any other transaction. Unicorn Asset Management Ltd is authorised and regulated by the Financial Conduct Authority.

NOTES TO EDITORS:

Unicorn Asset Management

Unicorn Asset Management was established in 2000 and is an independently owned and managed fund management business. Unicorn specialises in investing in UK listed, small and mid-cap companies, with particular experience and expertise in the Alternative Investment Market.

Unicorn operates a team-based approach to investment management and its experienced, committed, and well-resourced investment team has well over 100 years of combined experience.

Unicorn is focused on being the 'best not the biggest' and its funds aim to deliver long term outperformance. Unlike many investment firms, Unicorn is majority owned by its directors, its management team and by the family of one of its founders, which provides alignment of interest and a strong incentive to help ensure that the funds deliver consistently strong performance.

As at 28 February 2021, Unicorn managed c. £1.5 billion of client assets, invested across a range of funds that are designed to satisfy a variety of investor requirements. Unicorn's Funds include; Unicorn UK Income, Unicorn Ethical Income, Unicorn UK Growth, Unicorn Outstanding British Companies and Unicorn AIM VCT.

Chris Hutchinson, Director of Unicorn Asset Management

Chris is the lead manager of Unicorn AIM VCT and has been a key member of the Unicorn Investment Committee since he joined the firm in 2005. Prior to joining Unicorn, Chris was a Fund Manager at Montanaro Investment Managers for over eight years where he specialised in UK smaller companies.

*WM Capital Management acts as the Discretionary Fund Manager to the Service and is responsible for the day-to-day portfolio management. Unicorn is the investment adviser to the Service, drawing on years of AIM-investment expertise to select portfolios of AIM stocks.

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