

Foresight ITS celebrates 10-year anniversary

London, 11 April 2022: Foresight Group LLP (“Foresight”), a leading infrastructure and private equity investment manager, is pleased to announce the 10-year anniversary of Foresight Inheritance Tax Solution (“Foresight ITS”), its Business Relief based Inheritance Tax Solution.

Following its launch in 2012 and first investments in March 2013, Foresight ITS has significantly grown in size. It currently has more than 6,200 investors and has been recommended by c.1,570 adviser practices. The performance of Foresight ITS has remained strong, delivering an average annualised return of 3.9% pa net of all charges.

Foresight ITS’ current Net Asset Value (“NAV”) is over £800m, with over £934m raised since launch (as of 31st December 2021). The portfolio is currently invested in a diversified range of underlying investments focused on infrastructure businesses and other trades that benefit from contracted revenues, managed risk and low correlation to equities.

ESG considerations remain a key aspect of Foresight ITS, and its underlying wind, bio and solar assets produce over 500,000 MWh of electricity on a yearly basis, enough electricity to power 172,414 UK households for one year.

Nick Morgan, Partner at Foresight, said: *“With the number of estates becoming liable to IHT increasing year-on-year, it is no surprise that more and more people are looking for a solution. In 2020/21 HMRC receipts for IHT generated £5.4bn for the Treasury and projections are for this to increase in the future. Foresight ITS has helped our clients to invest in a diversified portfolio of predominantly UK-focused businesses in a tax-efficient manner, whilst making a positive impact in the fight against climate change.”*

ENDS

For more information contact:

Will Easton: foresight@citigatedewerogerson.com / +44 (0) 7786 420 017

Borja Miquel: foresight@citigatedewerogerson.com / +44 (0) 20 7025 6631

About Foresight Group LLP (“Foresight”):

Foresight Group was founded in 1984 and is a leading listed infrastructure and private equity investment manager. With a long-established focus on ESG and sustainability-led strategies, it aims

PRESS RELEASE



to provide attractive returns to its institutional and private investors from hard-to-access private markets.

Foresight manages over 300 infrastructure assets with a focus on solar and onshore wind assets, bioenergy and waste, as well as renewable energy enabling projects, energy efficiency management solutions, social and core infrastructure projects and sustainable forestry assets. Its private equity team manages eight regionally focused investment funds across the UK, supporting over 120 SMEs.

Foresight operates from 12 offices across six countries in Europe and Australia with AUM of £8.1 billion as at 30 September 2021. Foresight Group Holdings Limited listed on the Main Market of the London Stock Exchange in February 2021.