

# ETF Securities Weekly ETF Market Monitor



ETFS Management (AUS) Limited

## HIGHLIGHTS OF THE WEEK

for the week ending Friday, 31 August 2018

- The S&P/ASX 200 added 1.2% last week, led higher by financial and mining stocks as the market digested the change of leadership and cabinet reshuffle. Offshore, the S&P 500 gained 0.9%, while the EURO STOXX 50 dropped 1.0%. Emerging markets underperformed, with Argentina joining Turkey as a country of focus. Asian stocks, however, performed strongly with ITW, IKO and LJP all amongst the top performing ETFs for the week. ETFS ROBO Global Robotics and Automation ETF (ROBO) also had a strong week, returning 4.4%.
- The U.S. dollar strengthened last week on rising global uncertainty and higher rate expectations following the release of the latest FOMC minutes. The Australian dollar fell 1.9% to US\$1.89c, its lowest level since late-2016. U.S. 10-year Treasury yields increased by 5 basis points.
- Commodities were mixed. Gold ended the week marginally lower at US\$1,204/ounce, while palladium jumped 4.9%. WTI crude gained 1.6% to US\$69.80/bbl. The Bloomberg Commodities Industrial Metals subindex fell 1.7% and copper hit a 12-month low on emerging market concerns and the stronger U.S. dollar.
- The Australian ETF market saw inflows of \$116m into and outflows of \$18m from domestically domiciled funds last week. The largest inflows were into cash ETFs (AAA and BILL) and domestics equity funds (MVW, A200 and KSM). Outflows were spread across a range of diversified exposures.
- **ETF Securities has launched ETFS Battery Tech & Lithium ETF (ACDC), which provides exposure to developers of battery storage technology and lithium miners. Trading on the ASX commenced on 3rd September.**

	Price/ Yield	Price Return/ Change in Yield (%) <sup>1</sup>				Chart of the Week	
		Current	1W	1M	YTD	12M	YTD performance of Asian equity indices (in AUD)
S&P/ASX 200 Index	6,319	1.16%	0.63%	4.19%	10.59%		
Australian dollar/US dollar	0.7189	-1.91%	-3.17%	-7.94%	-9.54%		
Australian dollar/euro	0.6197	-1.71%	-2.42%	-4.75%	-7.13%		
Australian dollar/Japanese yen	79.82	-2.08%	-3.86%	-9.33%	-8.67%		
Aus 10 Year Govt Bond Yield	2.52%	-0.02%	-0.13%	-0.11%	-0.20%		
S&P 500 Index	2,902	0.93%	3.03%	8.52%	17.39%		
EURO STOXX 50 Index	3,393	-1.01%	-3.76%	-3.17%	-0.84%		
Nikkei 225 Index	22,865	1.17%	1.38%	0.44%	16.38%		
Euro/US dollar	1.16	-0.17%	-0.76%	-3.36%	-2.59%		
US dollar/Japanese yen	111.03	-0.19%	-0.74%	-1.47%	0.95%		
US 10 Year Treasury Yield	2.86%	0.05%	-0.10%	0.46%	0.74%		
Gold (US\$/troy ounce)	1,204	-0.14%	-1.68%	-7.61%	-8.92%		
Silver (US\$/troy ounce)	14.54	-1.89%	-6.33%	-14.15%	-17.29%		
Platinum (US\$/ounce)	788	-0.43%	-6.06%	-15.13%	-21.15%		
Palladium (US\$/ounce)	983	4.94%	5.17%	7.58%	4.74%		
WTI Crude (US\$/bbl)	69.80	1.57%	1.51%	15.52%	47.79%		
Bloomberg Commodity Index	83.74	0.05%	-1.94%	-5.03%	-1.09%		

## EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
iShares MSCI Taiwan ETF (ITW)	4.72%
ETFS ROBO Global Robotics and Automation ETF (ROBO)	4.42%
BetaShares Strong US Dollar Hedge Fund (YANK)	4.25%
iShares MSCI South Korea Capped ETF (IKO)	4.09%
iShares MSCI Japan ETF (LJP)	3.69%
Top 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
BetaShares Global Cybersecurity ETF (HACK)	12.75%
BetaShares NASDAQ 100 (NDQ)	8.91%
ETFS Morningstar Global Technology ETF (TECH)	8.91%
iShares Core S&P SmallCap ETF (LJR)	8.50%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	7.66%
Top 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	50.28%
iShares Core S&P SmallCap ETF (LJR)	46.17%
BetaShares Global Cybersecurity ETF (HACK)	45.71%
ETFS Morningstar Global Technology ETF (TECH)	41.77%
BetaShares NASDAQ 100 (NDQ)	40.72%

Bottom 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-4.79%
BetaShares Australian Equities Strong Bear (BBOZ)	-3.25%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-2.36%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-1.96%
BetaShares Australian Equities Bear (BEAR)	-1.35%
Bottom 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-12.29%
VanEck Vectors Gold Miners ETF (GDX)	-9.99%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-8.06%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-7.50%
BetaShares Agricultural ETF - Ccy Hedged (QAG)	-4.91%
Bottom 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-35.57%
BetaShares Australian Equities Strong Bear (BBOZ)	-26.79%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-25.57%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-23.29%
VanEck Vectors Gold Miners ETF (GDX)	-16.47%

## EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) <sup>4</sup>	
BetaShares Australian High Interest Cash ETF (AAA)	14.0
VanEck Vectors Australian Equal Weight ETF (MVW)	10.4
iShares Core Cash ETF (BILL)	10.0
BetaShares Australia 200 ETF (A200)	9.5
K2 Australian Small Cap Fund (KSM)	9.5

Top 5 ETFs by 1 Week Out-Flows (A\$m) <sup>4</sup>	
SPDR S&P/ASX 200 Listed Property Fund (SLF)	-3.9
iShares S&P/ASX 20 ETF (ILC)	-3.7
SPDR MSCI Australia Select High Dividend Yield Fund (SYI)	-2.9
BetaShares U.S. Dollar ETF (USD)	-2.7
VanEck Vectors Small Cap Dividend Payers ETF (MVS)	-2.5

## ETF SECURITIES PRODUCT MONITOR

ETF Name (ASX Code)	NAV Current	Total Return (%) <sup>2</sup>							MER <sup>5</sup> (%)
		1W	1M	YTD	6M	1Y	2Y	3Y	
ETFS Battery Tech & Lithium ETF (ACDC)	59.30	n/a	n/a	n/a	n/a	n/a	n/a	n/a	0.69
ETFS Global Core Infrastructure ETF (CORE)	54.11	1.33%	0.88%	6.57%	12.27%	n/a	n/a	n/a	0.45
ETFS EURO STOXX 50 ETF (ESTX)	63.67	0.39%	-1.59%	4.01%	5.68%	9.38%	13.36%	n/a	0.35
ETFS ROBO Global Robotics and Automation ETF (ROBO)	61.23	4.42%	7.50%	11.84%	8.32%	n/a	n/a	n/a	0.69
ETFS Morningstar Global Technology ETF (TECH)	73.58	3.26%	8.91%	31.14%	19.01%	41.77%	n/a	n/a	0.45
ETFS S&P/ASX 100 ETF (ZOZI)	11.33	1.44%	1.24%	6.94%	8.32%	14.27%	12.09%	10.65%	0.24
ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	11.29	1.37%	-0.45%	2.73%	4.05%	5.83%	12.11%	11.80%	0.35
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	13.10	0.90%	3.09%	8.71%	15.04%	17.38%	8.43%	12.42%	0.35
ETFS Physical US Dollar ETF (ZUSD)	10.60	1.37%	2.89%	8.82%	7.63%	10.55%	2.38%	-0.51%	0.30
ETFS Physical Gold (GOLD)	155.90	1.07%	0.53%	-0.63%	-3.46%	-0.53%	-3.02%	0.64%	0.40
ETFS Physical Palladium (ETPMPD)	124.26	2.46%	4.34%	-3.81%	1.37%	9.99%	19.95%	17.02%	0.49
ETFS Physical Platinum (ETPMPPT)	103.72	1.42%	-2.74%	-8.53%	-13.19%	-12.94%	-12.20%	-8.57%	0.49
ETFS Physical Precious Metal Basket (ETPMPM)	121.84	1.37%	0.31%	-3.22%	-3.80%	-1.38%	-2.10%	2.14%	0.44
ETFS Physical Silver (ETPMAG)	19.21	1.00%	-2.97%	-6.86%	-5.35%	-8.29%	-10.55%	-0.56%	0.49

Source: Bloomberg. Data as at 31 August 2018.



ETFS Management (AUS) Limited  
Level 11, 309 Kent Street  
Sydney NSW 2000  
Australia

T +61 2 8311 3488  
E infoAU@etfsecurities.com.au  
W www.etfsecurities.com.au

# ETF Securities

## Weekly ETF Market Monitor



<sup>1</sup> For Price series, return is calculated as Price(period end)/Price(period start)-1. For Yield series, return is calculated as Yield(period end) - Yield(period start).

<sup>2</sup> Total Return (%) is calculated on a NAV-to-NAV basis with distributions re-invested on the ex-date. For cross-listed funds, published NAVs from the main listing are converted to AUD at prevailing spot rates. For ETFs that do not publish daily NAVs or have not published NAVs on Bloomberg as at the publication time, last traded price is used as a proxy for any unavailable NAVs. Total returns are quoted on a per annum basis for periods exceeding one year.

<sup>3</sup> Indicates an ETF that does not publish a daily NAV or does not have a published NAV on Bloomberg as at the publication time. Last traded price is used as a proxy for NAV.

<sup>4</sup> Excludes cross-listed ETFs that report flow data monthly to the ASX.

<sup>5</sup> MER is the quoted management expense ratio of the fund.

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### CONTACT ETF Securities

#### Sales

Phone: +61 2 8311 3488  
Email: [infoAU@etfsecurities.com.au](mailto:infoAU@etfsecurities.com.au)

#### Trading

Phone: +61 2 8311 3483  
Email: [primarymarkets@etfsecurities.com.au](mailto:primarymarkets@etfsecurities.com.au)

Ganesh Balendran  
Co-Head of Sales  
Phone: +61 3 8518 4824  
Mobile: +61 4 2378 3284  
Email: [ganesh.balendran@etfsecurities.com.au](mailto:ganesh.balendran@etfsecurities.com.au)

Nicola Culey  
Business Development Associate  
Phone: +61 2 8311 3481  
Mobile: +61 4 4718 3111  
Email: [nicola.culey@etfsecurities.com.au](mailto:nicola.culey@etfsecurities.com.au)

Linda Cheng  
Business Development Manager  
Phone: +61 2 8311 3479  
Mobile: +61 4 8800 8245  
Email: [linda.cheng@etfsecurities.com.au](mailto:linda.cheng@etfsecurities.com.au)

Chad Hitzeman  
Business Development Manager  
Phone: +61 2 8311 3472  
Mobile: +61 4 6896 7837  
Email: [chad.hitzeman@etfsecurities.com.au](mailto:chad.hitzeman@etfsecurities.com.au)

Kanish Chugh  
Co-Head of Sales  
Phone: +61 2 8311 3476  
Mobile: +61 4 1209 1154  
Email: [kanish.chugh@etfsecurities.com.au](mailto:kanish.chugh@etfsecurities.com.au)

Gemma Weeks  
Business Development Manager  
Phone: +61 2 8311 3475  
Mobile: +61 4 6636 2055  
Email: [gemma.weeks@etfsecurities.com.au](mailto:gemma.weeks@etfsecurities.com.au)

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ETFS Management (AUS) Limited  
Level 11, 309 Kent Street  
Sydney NSW 2000  
Australia

**T** +61 2 8311 3488  
**E** [infoAU@etfsecurities.com.au](mailto:infoAU@etfsecurities.com.au)  
**W** [www.etfsecurities.com.au](http://www.etfsecurities.com.au)