

# ETF Securities Weekly ETF Market Monitor



ETFS Management (AUS) Limited

## HIGHLIGHTS OF THE WEEK

for the week ending Friday, 23 November 2018

- The global equity correction continued last week. The S&P 500 fell 3.8% as big technology names sold off. Apple was one of the hardest hit, falling 11.0%. BetaShares NASDAQ 100 ETF (NDQ) returned -3.8% for the week. The global energy sector also saw big moves with BetaShares Global Energy Companies ETF (FUEL) falling 4.3%. Healthcare is now the top performing US sector in 2018. Australia outperformed with the S&P/ASX 200 down just 0.3%. Financials and real estate were the top sectors and three domestic property funds, SLF, VAP and MVA, were amongst the week's top performing ETFs.
- The U.S. dollar regained ground last week against most majors. The Australian dollar ended the week 1.4% lower at US72.33c. U.S. Treasury yields pulled back as grown concerns dampened rate hike expectations.
- Crude oil continued to fall, dropping a further 10.7%. BetaShares Crude Oil Index ETF (OOO) was the poorest performing ETF for the week. Gold was flat for the week, while palladium declined 4.8%. The broad Bloomberg Commodities Index fell 2.9%.
- The Australian ETF market saw inflows of \$212m into and outflows of \$73m from domestically domiciled funds last week. The largest inflows were into domestic equity (A200, QOZ and E20) and fixed income (CRED and QPON) ETFs. Outflows were from Taiwanese equities (ITW) and domestic cash (AAA).

	Price/ Yield	Price Return/ Change in Yield (%) <sup>1</sup>				Chart of the Week	
		Current	1W	1M	YTD	12M	YTD performance of S&P 500 sectors (in USD)
S&P/ASX 200 Index	5,716	-0.25%	+2.17%	+5.75%	+4.51%		
Australian dollar/US dollar	0.7233	-1.35%	2.07%	-7.38%	-5.14%		
Australian dollar/euro	0.6380	-0.64%	3.29%	-1.94%	-0.84%		
Australian dollar/Japanese yen	81.69	-1.25%	2.53%	-7.20%	-3.67%		
Aus 10 Year Govt Bond Yield	2.65%	-0.03%	-0.03%	0.02%	0.14%		
S&P 500 Index	2,633	-3.79%	-3.95%	+1.54%	1.37%		
EURO STOXX 50 Index	3,137	-1.37%	-0.12%	-10.47%	-12.17%		
Nikkei 225 Index	21,647	-0.16%	-1.65%	-4.91%	-3.89%		
Euro/US dollar	1.13	-0.68%	-1.17%	-5.56%	-4.34%		
US dollar/Japanese yen	112.96	0.12%	0.46%	0.24%	1.56%		
US 10 Year Treasury Yield	3.04%	-0.02%	-0.13%	0.63%	0.72%		
Gold (US\$/troy ounce)	1,223	-0.03%	-0.59%	-6.12%	-5.30%		
Silver (US\$/troy ounce)	14.29	-0.93%	-3.02%	-15.63%	-16.38%		
Platinum (US\$/ounce)	844	-0.32%	1.30%	-9.13%	-9.82%		
Palladium (US\$/ounce)	1,121	-4.78%	-2.05%	5.38%	10.64%		
WTI Crude (US\$/bbl)	50.42	-10.70%	-2.10%	-16.55%	-13.10%		
Bloomberg Commodity Index	81.48	-2.90%	-4.30%	-7.58%	-6.38%		

## EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	9.46%
BetaShares Strong US Dollar Hedge Fund (YANK)	2.89%
SPDR S&P/ASX 200 Listed Property Fund (SLF)	2.40%
Vanguard Australian Property Securities Index ETF (VAP)	2.33%
VanEck Vectors Australian Property ETF (MVA)	2.09%
Top 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	9.88%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	4.56%
VanEck Vectors Australian Banks ETF (MVB)	3.92%
BetaShares Australian Equities Strong Bear (BBOZ)	3.90%
iShares MSCI Taiwan ETF (ITW) <sup>3</sup>	3.82%
Top 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
ETFS Physical Palladium (ETPMPD)	19.14%
VanEck Vectors Morningstar Wide Moat ETF (MOAT)	14.76%
BetaShares Global Cybersecurity ETF (HACK)	14.03%
iShares Global Healthcare ETF (IXJ)	13.55%
BetaShares Strong US Dollar Hedge Fund (YANK)	11.27%

Bottom 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-11.15%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	-8.51%
BetaShares Global Energy Companies ETF (Hedged) (FUEL)	-4.30%
BetaShares NASDAQ 100 (NDQ)	-3.84%
iShares S&P 500 AUD Hedged (IHVV)	-3.69%
Bottom 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-24.34%
BetaShares NASDAQ 100 (NDQ)	-10.35%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	-9.46%
BetaShares Commodities Basket ETF - Ccy Hedged (QCB)	-7.59%
BetaShares Global Robotics and Artificial Intelligence ETF (REIT)	-7.09%
Bottom 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
VanEck Vectors ChinaAAMC A-Share ETF (CETF)	-25.68%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-17.85%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-14.49%
UBS IQ MSCI Asia APREX 50 Ethical ETF (UBP)	-14.20%
Platinum Asia Fund (QMHF) (PAXX)	-12.72%

## EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) <sup>4</sup>	
BetaShares Australia 200 ETF (A200)	128.3
BetaShares Australian Investment Grade Corporate Bond ETF (CRED)	29.9
BetaShares FTSE RAFI Australia 200 ETF (QOZ)	7.6
BetaShares Australian Ex-20 Portfolio Diversifier ETF (EX20)	6.5
BetaShares Australian Bank Senior Floating Rate Bond ETF (QPON)	6.1

Top 5 ETFs by 1 Week Out-Flows (A\$m) <sup>4</sup>	
iShares MSCI Taiwan ETF (ITW) <sup>3</sup>	-32.4
BetaShares Australian High Interest Cash ETF (AAA)	-27.1
iShares S&P 500 AUD Hedged (IHVV)	-6.1
BetaShares Australian Equities Strong Bear (BBOZ)	-1.6
BetaShares Strong US Dollar Hedge Fund (YANK)	-1.5

## ETF SECURITIES PRODUCT MONITOR

ETF Name (ASX Code)	NAV Current	Total Return (%) <sup>2</sup>					MER <sup>5</sup> (%)	
		1W	1M	YTD	6M	1Y		
ETFS Battery Tech & Lithium ETF (ACDC)	46.45	-1.62%	-2.83%	n/a	n/a	n/a	n/a	0.69
ETFS Global Core Infrastructure ETF (CORE)	54.35	1.05%	0.72%	7.84%	6.56%	4.29%	n/a	0.45
ETFS S&P Biotech ETF (CURE)	47.05	-0.38%	n/a	n/a	n/a	n/a	n/a	0.45
ETFS EURO STOXX 50 ETF (ESTX)	57.53	-0.66%	-3.43%	-6.02%	-9.56%	-8.80%	9.56%	0.35
ETFS ROBO Global Robotics and Automation ETF (ROBO)	50.80	-1.74%	-5.34%	-7.20%	-12.32%	-11.48%	n/a	0.69
ETFS Morningstar Global Technology ETF (TECH)	62.79	-1.66%	-6.01%	11.90%	-3.28%	6.06%	n/a	0.45
ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	10.25	-0.72%	-1.89%	-5.42%	-6.12%	-4.23%	4.98%	0.35
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	12.67	-0.68%	-2.10%	6.00%	6.53%	5.02%	6.86%	0.35
ETFS Physical US Dollar ETF (ZUSD)	10.63	1.19%	-2.23%	9.18%	5.06%	6.48%	1.71%	0.30
ETFS Physical Gold (GOLD)	159.64	1.27%	-3.36%	1.76%	-1.04%	-0.39%	2.31%	0.40
ETFS Physical Silver (ETPMAG)	18.79	0.95%	-5.44%	-8.95%	-10.14%	-12.49%	-6.66%	0.49
ETFS Physical Platinum (ETPMPT)	110.43	0.68%	-1.57%	-2.62%	-3.30%	-5.74%	-4.14%	0.49
ETFS Physical Palladium (ETPMPD)	150.36	-2.01%	-2.39%	16.40%	22.31%	19.14%	26.21%	0.44
ETFS Physical Precious Metals Basket (ETPMPM)	128.74	0.38%	-3.36%	2.26%	1.48%	0.53%	4.04%	0.49

Source: Bloomberg. Data as at 23 November 2018.



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# ETF Securities

## Weekly ETF Market Monitor



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

<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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