

ETF Securities

Weekly ETF Market Monitor



ETFS Management (AUS) Limited

HIGHLIGHTS OF THE WEEK

for the week ending Friday, 2 November 2018

- Global equity markets bounced last week as volatility subsided in the run-up to this week's U.S. midterm elections. The S&P 500 ended the week up 2.4%, while the EURO STOXX 50 added 2.5% and the Nikkei 225 jumped 5.0%. Leveraged funds aside, the top performing ETFs for the week were global robotics funds (RBTZ and ROBO), which returned in excess of 6%. Asia Pac funds also performed strongly. Bearish equity funds, unsurprisingly, dominated the worst performers list.
- The Australian dollar ended the week stronger at US\$1.93c. U.S. 10-year Treasury yields rose 14bps and expectations of a December hike by the Fed firmed on strong U.S. employment data.
- Gold traded in a tight range, ending the week slightly lower at US\$1,233/ounce, while platinum rose 4.3%. WTI crude fell 6.6% to US\$63.14/bbl as U.S. sanctions on Iranian exports commenced.
- The Australian ETF market saw inflows of \$447m into and outflows of \$264m from domestically domiciled funds last week. The largest inflows were into domestic equity ETFs (VAS, VHY and STW), while global broad-based equity funds (VGS and VGAD) also attracted strong flows. The bulk of outflows were also from domestic equities (IOZ).

	Price/ Yield	Price Return/ Change in Yield (%) ¹				Chart of the Week
		Current	1W	1M	YTD	
S&P/ASX 200 Index	5,849	3.25%	4.52%	3.56%	1.39%	
Australian dollar/US dollar	0.7193	1.45%	0.07%	7.89%	6.74%	
Australian dollar/euro	0.6318	1.62%	1.49%	2.89%	4.50%	
Australian dollar/Japanese yen	81.43	2.61%	-0.34%	7.50%	7.46%	
Aus 10 Year Govt Bond Yield	2.70%	0.10%	0.03%	0.06%	0.04%	
S&P 500 Index	2,723	2.42%	6.85%	1.85%	5.55%	
EURO STOXX 50 Index	3,214	2.54%	5.15%	8.26%	12.86%	
Nikkei 225 Index	22,244	5.00%	8.35%	2.29%	1.31%	
Euro/US dollar	1.14	-0.13%	1.39%	5.14%	2.32%	
US dollar/Japanese yen	113.20	1.15%	-0.40%	0.45%	-0.77%	
US 10 Year Treasury Yield	3.21%	0.14%	0.15%	0.81%	0.87%	
Gold (US\$/troy ounce)	1,233	-0.05%	2.46%	5.37%	3.39%	
Silver (US\$/troy ounce)	14.71	0.12%	0.16%	13.12%	14.02%	
Platinum (US\$/ounce)	868	4.26%	4.48%	6.47%	6.20%	
Palladium (US\$/ounce)	1,119	1.19%	6.00%	5.20%	12.15%	
WTI Crude (US\$/bbl)	63.14	-6.58%	-16.07%	4.50%	15.77%	
Bloomberg Commodity Index	83.88	-1.31%	3.75%	4.86%	3.24%	

EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) ²	
BetaShares Geared Australian Equity Fund (GEAR)	8.89%
BetaShares Global Robotics and Artificial Intelligence ETF (RBTZ)	6.65%
ETFS ROBO Global Robotics and Automation ETF (ROBO)	6.13%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	5.84%
UBS IQ MSCI Asia APREX 50 Ethical ETF (UBP)	5.63%
Top 5 ETFs by 1 Month Total Return (%) ²	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	17.27%
BetaShares Australian Equities Strong Bear (BBOZ)	11.46%
ETFS Physical Palladium (ETPMPD)	5.07%
BetaShares Australian Equities Bear (BEAR)	4.92%
ETFS Physical Platinum (ETPMPT)	4.56%
Top 5 ETFs by 12 Month Total Return (%) ²	
BetaShares Global Cybersecurity ETF (HACK)	24.27%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	20.37%
BetaShares NASDAQ 100 (NDQ)	20.30%
VanEck Vectors Morningstar Wide Moat ETF (MOAT)	19.41%
ETFS Physical Palladium (ETPMPD)	18.67%

Bottom 5 ETFs by 1 Week Total Return (%) ²	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-6.53%
BetaShares Australian Equities Strong Bear (BBOZ)	-5.59%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-4.17%
BetaShares Strong US Dollar Hedge Fund (YANK)	-2.80%
BetaShares Australian Equities Bear (BEAR)	-2.53%
Bottom 5 ETFs by 1 Month Total Return (%) ²	
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	-17.78%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-15.86%
BetaShares Geared Australian Equity Fund (GEAR)	-11.46%
BetaShares Global Robotics and Artificial Intelligence ETF (RBTZ)	-11.08%
BetaShares Global Energy Companies ETF (Hedged) (FUEL)	-10.76%
Bottom 5 ETFs by 12 Month Total Return (%) ²	
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-18.26%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-17.10%
VanEck Vectors ChinaAMC A-Share ETF (CETF)	-16.38%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-15.83%
Platinum Asia Fund (QMHF) (PAXX) ³	-9.16%

EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) ⁴	
Vanguard Australian Shares Index ETF (VAS)	113.4
Vanguard MSCI Index International Series (VGS)	43.9
Vanguard Australian Shares High Yield ETF (VHY)	34.1
SPDR S&P/ASX 200 Fund (STW)	32.1
Vanguard MSCI Index International Series (Hedged) (VGAD)	19.1

Top 5 ETFs by 1 Week Out-Flows (A\$m) ⁴	
iShares S&P/ASX 200 ETF (IOZ)	-217.9
BetaShares Australian High Interest Cash ETF (AAA)	-10.1
BetaShares NASDAQ 100 (NDQ)	-6.6
iShares Core S&P 500 (IVV)	-5.4
BetaShares U.S. Dollar ETF (USD)	-4.1

ETF SECURITIES PRODUCT MONITOR

ETF Name (ASX Code)	NAV	Total Return (%) ⁵							MER ⁵ (%)	
		Current	1W	1M	YTD	6M	1Y	2Y		3Y
ETFS Battery Tech & Lithium ETF (ACDC)	48.30	2.80%	6.11%	n/a	n/a	n/a	n/a	n/a	n/a	0.69
ETFS Global Core Infrastructure ETF (CORE)	52.64	1.67%	2.49%	4.45%	2.18%	3.61%	n/a	n/a	n/a	0.45
ETFS EURO STOXX 50 ETF (ESTX)	59.36	0.82%	6.50%	3.04%	8.77%	6.32%	11.33%	n/a	n/a	0.35
ETFS ROBO Global Robotics and Automation ETF (ROBO)	54.56	6.13%	9.36%	-0.35%	-1.44%	0.51%	n/a	n/a	n/a	0.69
ETFS Morningstar Global Technology ETF (TECH)	66.01	3.46%	7.90%	17.63%	5.96%	15.90%	n/a	n/a	n/a	0.45
ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	10.43	2.74%	3.83%	3.75%	4.46%	3.97%	8.53%	9.35%	0.35	
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	12.68	0.07%	2.96%	6.04%	8.31%	7.34%	11.35%	9.32%	0.35	
ETFS Physical US Dollar ETF (ZUSD)	10.67	-1.72%	0.13%	9.53%	4.69%	8.25%	3.77%	-0.01%	0.30	
ETFS Physical Gold (GOLD)	161.43	-1.90%	2.25%	2.89%	-1.84%	2.90%	-0.08%	2.14%	0.40	
ETFS Physical Palladium (ETPMPD)	147.44	0.13%	5.07%	14.13%	19.52%	18.67%	36.01%	18.48%	0.49	
ETFS Physical Platinum (ETPMPT)	114.61	3.12%	4.56%	1.07%	0.27%	-0.71%	-4.15%	-4.52%	0.49	
ETFS Physical Precious Metal Basket (ETPMPM)	130.30	-0.84%	3.06%	3.50%	1.67%	3.61%	3.24%	3.46%	0.44	
ETFS Physical Silver (ETPMAG)	19.61	-0.89%	2.14%	4.93%	5.86%	7.38%	8.19%	2.00%	0.49	

Source: Bloomberg. Data as at 2 November 2018.



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¹ 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).

² 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.

³ 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.

⁴ Excludes cross-listed ETFs that report flow data monthly to the ASX.

⁵ MER is the quoted management expense ratio of the fund.

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