

# ETF Securities Weekly ETF Market Monitor



ETFS Management (AUS) Limited

## HIGHLIGHTS OF THE WEEK

for the week ending Friday, 14 September 2018

- The S&P/ASX 200 gained 0.4% last week, with resources stocks bouncing back. Offshore developed markets gained, the S&P 500 was up by 1.2%, while the EURO STOXX 50 gained 1.6%. Japan's Nikkei 225 also gained 3.5%. ETFS Physical Platinum (ETPMPT) had another strong week returning 3.2%, whilst the Betashares WisdomTree Japan ETF was the best performing, with a return of 3.5% for the week. Asian stock markets have had a mixed year, with Chinese equities continuing to struggle compared to Japan and Taiwan (see Chart of the Week).
- The U.S. dollar weakened last week. Currency pressure continues in emerging markets including Argentina, Turkey, Brazil, Russia and South Africa. The Australian dollar gained 0.7% to reach US\$1.53c, after hitting a two year low a week earlier. U.S. 10-year Treasury yields increased by 6 basis points.
- Commodities were mixed. Gold ended the week marginally lower at US\$1,195/ounce, while Silver fell 0.8%. WTI crude gained 1.8% to US\$68.99/bbl. The Bloomberg Commodities Industrial Metals Index fell 0.2%.
- The Australian ETF market saw inflows of \$118m into and outflows of \$22m from domestically domiciled funds last week. The largest inflows were into cash ETFs (BILL, AAA and ISEC) and domestic funds (MVW and IOZ). Outflows were spread across a range of different exposures.

	Price/ Yield	Price Return/ Change in Yield (%) <sup>1</sup>				Chart of the Week	
	Current	1W	1M	YTD	12M	Asian Equity Markets Year to 14/09/2018 in Local Currency	
S&P/ASX 200 Index	6,165	0.35%	-2.13%	1.65%	7.43%		
Australian dollar/US dollar	0.7153	0.65%	-1.24%	-8.40%	-10.64%		
Australian dollar/euro	0.6155	0.08%	-3.59%	-5.40%	-8.35%		
Australian dollar/Japanese yen	80.15	1.62%	-0.41%	-8.95%	-9.17%		
Aus 10 Year Govt Bond Yield	2.60%	0.05%	0.01%	-0.03%	-0.12%		
S&P 500 Index	2,905	1.16%	2.29%	8.65%	16.40%		
EURO STOXX 50 Index	3,345	1.56%	-1.90%	-4.55%	-5.16%		
Nikkei 225 Index	23,095	3.53%	3.30%	1.45%	16.60%		
Euro/US dollar	1.16	0.62%	2.48%	-3.17%	-2.47%		
US dollar/Japanese yen	112.06	0.96%	0.82%	-0.56%	1.65%		
US 10 Year Treasury Yield	3.00%	0.06%	0.10%	0.59%	0.81%		
Gold (US\$/troy ounce)	1,195	-0.17%	0.06%	-8.29%	-10.14%		
Silver (US\$/troy ounce)	14.06	-0.78%	-6.61%	-16.98%	-20.98%		
Platinum (US\$/ounce)	796	1.74%	-0.72%	-14.26%	-19.19%		
Palladium (US\$/ounce)	979	-0.18%	8.81%	-7.99%	5.57%		
WTI Crude (US\$/bbl)	68.99	1.83%	2.91%	14.18%	38.28%		
Bloomberg Commodity Index	82.46	-0.15%	-1.57%	-6.47%	-3.10%		

## EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) <sup>2</sup>		Bottom 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
BetaShares WisdomTree Japan ETF (HJPN)	3.55%	BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-2.49%
ETFS Physical Platinum (ETPMPT)	3.21%	VanEck Vectors ChinaAMC A-Share ETF (CETF)	-1.99%
VanEck Vectors Australian Resources ETF (MVR)	3.06%	BetaShares Australian Equities Strong Bear (BBOZ)	-1.63%
BetaShares S&P/ASX 200 Resources Sector ETF (QRE)	2.83%	BetaShares Strong US Dollar Hedge Fund (YANK)	-1.58%
SPDR S&P/ASX 200 Resources Fund (OZR)	2.81%	BetaShares Agricultural ETF - Ccy Hedged (QAG)	-1.54%
Top 5 ETFs by 1 Month Total Return (%) <sup>2</sup>		Bottom 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
ETFS Physical Palladium (ETPMPD)	11.52%	BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-9.38%
BetaShares Global Cybersecurity ETF (HACK)	8.31%	VanEck Vectors Gold Miners ETF (GDX)	-8.06%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	5.62%	BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-5.71%
ETFS Morningstar Global Technology ETF (TECH)	4.43%	BetaShares Agricultural ETF - Ccy Hedged (QAG)	-5.13%
iShares MSCI South Korea Capped ETF (IKO)	4.36%	ETFS Physical Silver (ETPMAG)	-4.50%
Top 5 ETFs by 12 Month Total Return (%) <sup>2</sup>		Bottom 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
BetaShares Global Cybersecurity ETF (HACK)	47.64%	BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-34.05%
iShares Core S&P SmallCap ETF (IJR)	43.31%	BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-25.91%
ETFS Morningstar Global Technology ETF (TECH)	41.54%	BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-24.54%
BetaShares NASDAQ 100 (NDQ)	41.02%	BetaShares Australian Equities Strong Bear (BBOZ)	-21.43%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	40.73%	VanEck Vectors Gold Miners ETF (GDX)	-17.18%

## EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) <sup>4</sup>		Top 5 ETFs by 1 Week Out-Flows (A\$m) <sup>4</sup>	
iShares Core Cash ETF (BILL)	31.1	BetaShares U.S. Dollar ETF (USD)	-6.1
iShares Enhanced Cash ETF (ISEC)	20.1	BetaShares Australian Equities Strong Bear (BBOZ)	-4.1
BetaShares Australian High Interest Cash ETF (AAA)	13.0	BetaShares S&P500 Yield Maximiser Fund (UMAX)	-3.1
iShares S&P/ASX 200 ETF (IOZ)	7.7	BetaShares Australian Dividend Harvester Fund (HVST)	-3.1
VanEck Vectors Australian Equal Weight ETF (MVW)	7.3	iShares Core S&P MidCap ETF (IJH)	-2.2

## ETF SECURITIES PRODUCT MONITOR

ETF Name (ASX Code)	NAV	Total Return (%) <sup>2</sup>							MER <sup>3</sup> (%)
	Current	1W	1M	YTD	6M	1Y	2Y	3Y	
ETFS Battery Tech & Lithium ETF (ACDC)	50.26	2.11%	n/a	n/a	n/a	n/a	n/a	n/a	0.69
ETFS Global Core Infrastructure ETF (CORE)	54.73	0.36%	0.46%	7.80%	13.37%	n/a	n/a	n/a	0.45
ETFS EURO STOXX 50 ETF (ESTX)	63.38	1.76%	1.67%	3.53%	4.46%	6.42%	13.32%	n/a	0.35
ETFS ROBO Global Robotics and Automation ETF (ROBO)	60.41	1.59%	4.24%	10.35%	4.98%	n/a	n/a	n/a	0.69
ETFS Morningstar Global Technology ETF (TECH)	73.39	1.82%	4.43%	30.79%	15.86%	41.54%	n/a	n/a	0.45
ETFS S&P/ASX 100 ETF (ZOZI)	11.11	0.48%	-1.12%	4.87%	5.95%	11.15%	12.96%	10.46%	0.24
ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	11.18	0.15%	-1.11%	1.73%	2.71%	4.25%	13.28%	12.53%	0.35
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	13.32	0.40%	2.87%	10.51%	16.95%	17.42%	10.63%	13.67%	0.35
ETFS Physical US Dollar ETF (ZUSD)	10.68	-0.48%	1.15%	9.63%	10.23%	12.01%	2.47%	0.02%	0.30
ETFS Physical Gold (GOLD)	157.96	-0.26%	1.43%	0.68%	-0.61%	0.41%	-3.12%	2.28%	0.40
ETFS Physical Palladium (ETPMPD)	131.04	0.00%	11.52%	1.44%	7.22%	16.95%	24.79%	18.02%	0.49
ETFS Physical Platinum (ETPMPT)	106.88	3.21%	0.88%	-5.75%	-8.65%	-9.19%	-10.35%	-6.04%	0.49
ETFS Physical Precious Metal Basket (ETPMPM)	123.94	0.08%	2.18%	-1.55%	-0.94%	0.04%	-1.66%	3.30%	0.44
ETFS Physical Silver (ETPMAG)	18.87	-0.30%	-4.50%	-8.52%	-6.35%	-11.46%	-12.29%	-1.14%	0.49

Source: Bloomberg. Data as at 14 September 2018.



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<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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