

ETF Securities

Weekly ETF Market Monitor



ETFS Management (AUS) Limited

HIGHLIGHTS OF THE WEEK

for the week ending Friday, 17 August 2018

- Further volatility in the Turkish lira hit emerging markets last week. The MSCI Emerging Markets Index fell by 3.7%. China was hit particularly hard, with the Shanghai Composite down 4.5% for the week. European financials were sold on Turkey concerns, dragging the EURO STOXX 50 down 1.6%. The S&P 500 gained 0.6% as defensive sectors outperformed. The ETFs S&P 500 High Yield Low Volatility ETF (ZYUS) was the top performing ETF for the week. Domestically, the S&P/ASX 200 added 1.0% as gains in financials offset losses in the resources sector.
- The Turkish lira regained some ground last week, rising by 6.8% following its 21% decline in the previous week. The U.S. dollar fell against most majors. The Australian dollar gained 0.15% to end the week at US71.13c.
- Commodities declined last week, with the broad Bloomberg Commodities Index down 1.1%. WTI Crude dropped by 2.5%. Precious metals also fell, with gold down 2.2% to US\$1,184/ounce and silver down 3.3%.
- The Australian ETF market saw inflows of \$93m into and outflows of \$36m from domestically domiciled funds last week. The largest inflows were into iShares S&P/ASX 200 ETF (IOZ), VanEck Vectors Australian Floating Rate ETF (FLOT) and a range of international equity funds (QUAL, IHVV and IAA). The largest outflows were from BetaShares FTSE RAFI Australia 200 ETF (QOZ) and BetaShares U.S. Dollar ETF (USD).

	Price/ Yield	Price Return/ Change in Yield (%) ¹				Chart of the Week	
		Current	1W	1M	YTD	12M	6M performance of S&P 500 vs ZYUS in AUD
S&P/ASX 200 Index	6,339	0.97%	2.19%	4.52%	9.69%		
Australian dollar/US dollar	0.7313	0.15%	1.03%	6.35%	7.25%		
Australian dollar/euro	0.6395	-0.05%	0.92%	1.71%	4.94%		
Australian dollar/Japanese yen	80.83	-0.15%	3.09%	8.18%	6.45%		
Aus 10 Year Govt Bond Yield	2.55%	-0.04%	-0.11%	-0.09%	-0.10%		
S&P 500 Index	2,850	0.59%	1.44%	6.60%	17.29%		
EURO STOXX 50 Index	3,373	-1.56%	-2.45%	-3.74%	-2.57%		
Nikkei 225 Index	22,270	-0.12%	-1.88%	-2.17%	13.03%		
Euro/US dollar	1.14	0.22%	-1.91%	-4.72%	-2.43%		
US dollar/Japanese yen	110.50	-0.30%	-2.11%	-1.94%	0.85%		
US 10 Year Treasury Yield	2.86%	-0.01%	0.00%	0.46%	0.68%		
Gold (US\$/troy ounce)	1,184	-2.17%	-3.53%	-9.10%	-8.07%		
Silver (US\$/troy ounce)	14.80	-3.33%	-4.95%	-12.60%	-13.11%		
Platinum (US\$/ounce)	789	-4.68%	-3.53%	-15.01%	-19.05%		
Palladium (US\$/ounce)	914	0.42%	-0.01%	-14.01%	-0.87%		
WTI Crude (US\$/bbl)	65.91	-2.54%	-3.19%	-9.09%	-39.97%		
Bloomberg Commodity Index	83.35	-1.05%	0.63%	-5.47%	0.81%		

EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) ²	
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	2.87%
BetaShares Geared Australian Equity Fund (GEAR)	2.57%
VanEck Vectors Australian Banks ETF (MVB)	2.46%
Vanguard Australian Shares High Yield ETF (VHY)	2.45%
VanEck Vectors Australian Property ETF (MVA)	2.36%
Top 5 ETFs by 1 Month Total Return (%) ²	
BetaShares Agricultural ETF - Ccy Hedged (QAG)	5.52%
BetaShares Geared Australian Equity Fund (GEAR)	4.92%
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	4.42%
iShares Global Healthcare ETF (IXJ)	4.30%
VanEck Vectors Australian Property ETF (MVA)	4.19%
Top 5 ETFs by 12 Month Total Return (%) ²	
iShares Core S&P SmallCap ETF (IJR)	44.09%
BetaShares Global Cybersecurity ETF (HACK)	41.36%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	40.34%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	39.32%
BetaShares NASDAQ 100 (NDQ)	38.97%

Bottom 5 ETFs by 1 Week Total Return (%) ²	
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-9.47%
VanEck Vectors Gold Miners ETF (GDXX)	-8.94%
ETFS Physical Platinum (ETPMPT)	-5.41%
iShares China Large-Cap ETF (ICZZ)	-4.78%
VanEck Vectors MSCI Multifactor Emerging Markets ETF (EMKI)	-4.23%
Bottom 5 ETFs by 1 Month Total Return (%) ²	
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-15.24%
VanEck Vectors Gold Miners ETF (GDXX)	-13.34%
VanEck Vectors ChinaAAMC A-Share ETF (CETF)	-6.40%
ETFS Physical Silver (ETPMAG)	-5.67%
BetaShares Gold Bullion ETF - Ccy Hedged (QAU)	-5.55%
Bottom 5 ETFs by 12 Month Total Return (%) ²	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-35.25%
BetaShares Australian Equities Strong Bear (BBOZ)	-24.85%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-21.33%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-18.62%
ETFS Physical Platinum (ETPMPT)	-13.53%

EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) ⁴	
iShares S&P/ASX 200 ETF (IOZ)	13.8
VanEck Vectors Australian Floating Rate ETF (FLOT)	7.0
VanEck Vectors MSCI World Ex-Australia ETF (QUAL)	6.9
iShares S&P 500 AUD Hedged (IHVV)	6.4
iShares Asia 50 ETF (IAA) ³	6.3

Top 5 ETFs by 1 Week Out-Flows (A\$m) ⁴	
BetaShares FTSE RAFI Australia 200 ETF (QOZ)	-16.4
BetaShares U.S. Dollar ETF (USD)	-9.0
BetaShares Australian High Interest Cash ETF (AAA)	-4.9
iShares S&P/ASX Dividend Opportunities Fund ETF (IHD)	-2.7
BetaShares Aust Top 20 Eq Yield Maximiser Fund (YMAX)	-1.8

ETF SECURITIES PRODUCT MONITOR

ETF Name (ASX Code)	NAV Current	Total Return (%) ²							MER ⁵ (%)
		1W	1M	YTD	6M	1Y	2Y	3Y	
ETFS Global Core Infrastructure ETF (CORE)	54.38	0.94%	2.43%	7.11%	12.11%	n/a	n/a	n/a	0.45
ETFS EURO STOXX 50 ETF (ESTX)	61.67	-1.22%	-3.18%	0.74%	0.48%	5.81%	12.52%	n/a	0.35
ETFS ROBO Global Robotics and Automation ETF (ROBO)	57.52	-0.60%	1.52%	5.06%	3.15%	n/a	n/a	n/a	0.69
ETFS Morningstar Global Technology ETF (TECH)	69.82	0.25%	-0.40%	24.43%	17.87%	38.86%	n/a	n/a	0.45
ETFS S&P/ASX 100 ETF (ZOZI)	11.35	1.33%	2.67%	7.07%	9.49%	13.40%	11.33%	9.82%	0.24
ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	11.37	0.45%	0.77%	3.45%	6.40%	6.89%	12.17%	11.51%	0.35
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	13.18	2.87%	4.42%	9.39%	15.13%	19.09%	9.30%	12.04%	0.35
ETFS Physical US Dollar ETF (ZUSD)	10.52	0.57%	1.61%	8.05%	9.38%	9.61%	2.81%	0.58%	0.30
ETFS Physical Gold (GOLD)	152.80	-2.44%	-3.00%	-2.60%	-5.33%	-0.67%	-4.48%	1.86%	0.40
ETFS Physical Palladium (ETPMPT)	117.25	-1.23%	-0.75%	-9.23%	-6.29%	4.49%	15.38%	13.40%	0.49
ETFS Physical Platinum (ETPMPT)	102.06	-5.41%	-4.19%	-10.00%	-15.84%	-13.53%	-14.60%	-7.72%	0.49
ETFS Physical Precious Metal Basket (ETPMPT)	119.00	-2.80%	-3.20%	-5.48%	-6.54%	-2.21%	-4.14%	2.01%	0.44
ETFS Physical Silver (ETPMAG)	19.21	-4.14%	-5.67%	-6.91%	-5.45%	-6.78%	-11.81%	-1.30%	0.49

Source: Bloomberg. Data as at 17 August 2018.



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ETF Securities Weekly ETF Market Monitor



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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