

ETF Securities Weekly ETF Market Monitor



ETFs Management (AUS) Limited

HIGHLIGHTS OF THE WEEK

for the week ending Friday, 30 November 2018

- U.S. equities rallied strongly last week on Fed comments that interest rates are approaching equilibrium and a truce in the trade dispute with China. The S&P 500 gained 4.9%, led higher by IT and healthcare stocks. ETFs Morningstar Global Technology ETF (TECH) was the top performing unleveraged ETF for the week, returning 6.5%. NDAQ returned 5.4%, while global healthcare fund DRUG returned 5.0%. Elsewhere the EURO STOXX 50 added 1.1% and the Nikkei 225 gained 3.3%. Domestically, the S&P/ASX 200 fell by 0.9% with the biggest declines being in the mining sector. QRE and OZR were both amongst the poorest performers for the week.
- The Australian dollar ended the week 1.0% stronger at US73.06. U.S. Treasury yields pulled back as rate hike expectations tapered.
- Crude oil halted its recent slide, gaining 1.0% for the week as expectations of an OPEC production cut firmed. Gold fell slightly to US\$1,221/ounce, while platinum declined 5.4%. The broad Bloomberg Commodities Index gained 1.3%.
- The Australian ETF market saw inflows of \$349m into and outflows of \$101m from domestically domiciled funds last week. The largest flows were into and out of broad-based domestic and international equity funds.

	Price/ Yield	Price Return/ Change in Yield (%) ¹				Chart of the Week
		Current	1W	1M	YTD	
S&P/ASX 200 Index	5,667	-0.86%	-2.38%	-6.56%	-5.07%	
Australian dollar/US dollar	0.7306	1.01%	2.83%	6.44%	3.44%	
Australian dollar/euro	0.6457	1.21%	3.10%	-0.75%	1.59%	
Australian dollar/Japanese yen	82.98	1.57%	3.24%	-5.74%	-2.56%	
Aus 10 Year Govt Bond Yield	2.59%	-0.06%	0.01%	-0.04%	0.09%	
S&P 500 Index	2,760	4.85%	2.89%	3.24%	4.25%	
EURO STOXX 50 Index	3,173	1.14%	0.83%	-9.44%	-11.12%	
Nikkei 225 Index	22,351	3.25%	4.17%	1.82%	1.65%	
Euro/US dollar	1.13	-0.18%	-0.25%	-5.73%	-4.93%	
US dollar/Japanese yen	113.57	0.54%	0.39%	0.78%	0.92%	
US 10 Year Treasury Yield	2.99%	-0.05%	-0.13%	0.58%	0.58%	
Gold (US\$/troy ounce)	1,221	-0.21%	-0.20%	-6.32%	-4.27%	
Silver (US\$/troy ounce)	14.20	-0.60%	-1.85%	-16.13%	-13.59%	
Platinum (US\$/ounce)	798	-5.38%	-4.59%	-14.02%	-15.36%	
Palladium (US\$/ounce)	1,181	5.38%	9.61%	11.05%	16.88%	
WTI Crude (US\$/bbl)	50.93	1.01%	-23.04%	-15.71%	-11.27%	
Bloomberg Commodity Index	82.56	1.32%	-1.22%	-6.36%	-3.67%	

EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) ²	
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	10.97%
ETFs Morningstar Global Technology ETF (TECH)	6.51%
BetaShares NASDAQ 100 (NDQ)	5.37%
BetaShares Global Healthcare ETF (Hedged) (DRUG)	4.97%
iShares S&P 500 AUD Hedged (IHVV)	4.65%
Top 5 ETFs by 1 Month Total Return (%) ²	
ETFs Physical Palladium (ETPMPD)	8.41%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	6.27%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	6.08%
BetaShares Global Healthcare ETF (Hedged) (DRUG)	5.97%
UBS IQ MSCI Asia APREX 50 Ethical ETF (UBP)	4.71%
Top 5 ETFs by 12 Month Total Return (%) ²	
ETFs Physical Palladium (ETPMPD)	23.42%
BetaShares Global Cybersecurity ETF (HACK)	17.08%
iShares Global Healthcare ETF (IXJ)	15.53%
VanEck Vectors Morningstar Wide Moat ETF (MOAT)	14.90%
ETFs Morningstar Global Technology ETF (TECH)	14.55%

Bottom 5 ETFs by 1 Week Total Return (%) ²	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-10.91%
ETFs Physical Platinum (ETPMPPT)	-4.92%
BetaShares S&P/ASX 200 Resources Sector ETF (QRE)	-2.73%
SPDR S&P/ASX 200 Resources Fund (OZR)	-2.72%
BetaShares Geared Australian Equity Fund (GEAR)	-2.43%
Bottom 5 ETFs by 1 Month Total Return (%) ²	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-23.26%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-6.78%
ETFs Physical Platinum (ETPMPPT)	-6.27%
BetaShares S&P/ASX 200 Resources Sector ETF (QRE)	-6.24%
SPDR S&P/ASX 200 Resources Fund (OZR)	-6.21%
Bottom 5 ETFs by 12 Month Total Return (%) ²	
VanEck Vectors ChinaAAMC A-Share ETF (CETF)	-21.16%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-17.12%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-14.54%
iShares MSCI Taiwan ETF (ITW) ³	-12.92%
ETFs Physical Platinum (ETPMPPT)	-11.41%

EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) ⁴	
Vanguard Australian Shares Index ETF (VAS)	76.6
Vanguard MSCI Index International Series (VGS)	40.8
SPDR S&P/ASX 200 Fund (STW)	31.9
Vanguard MSCI Index International Series (Hedged) (VGAD)	19.1
iShares S&P/ASX 200 ETF (IOZ)	17.7

Top 5 ETFs by 1 Week Out-Flows (A\$m) ⁴	
BetaShares Australia 200 ETF (A200)	-57.6
BetaShares Australian High Interest Cash ETF (AAA)	-11.0
BetaShares U.S. Dollar ETF (USD)	-4.0
iShares MSCI EAFE ETF (IVE)	-3.3
K2 Global Equities Fund (KII)	-3.0

ETF SECURITIES PRODUCT MONITOR

ETF Name (ASX Code)	NAV Current	Total Return (%) ²					MER ⁵ (%)		
		1W	1M	YTD	6M	1Y		2Y	3Y
ETFs Battery Tech & Lithium ETF (ACDC)	47.09	1.37%	6.87%	n/a	n/a	n/a	n/a	n/a	0.69
ETFs Global Core Infrastructure ETF (CORE)	54.40	0.10%	1.62%	7.94%	6.17%	2.35%	n/a	n/a	0.45
ETFs S&P Biotech ETF (CURE)	48.43	2.92%	n/a	n/a	n/a	n/a	n/a	n/a	0.45
ETFs EURO STOXX 50 ETF (ESTX)	57.50	-0.06%	-2.13%	-6.07%	-6.58%	-9.79%	8.77%	n/a	0.35
ETFs ROBO Global Robotics and Automation ETF (ROBO)	52.47	3.27%	1.08%	-4.17%	-7.59%	-7.89%	n/a	n/a	0.69
ETFs Morningstar Global Technology ETF (TECH)	66.88	6.51%	3.87%	19.19%	2.65%	14.55%	n/a	n/a	0.45
ETFs S&P/ASX 300 High Yield Plus ETF (ZYAU)	10.14	-1.02%	-3.35%	-6.39%	-6.95%	-5.92%	4.55%	7.80%	0.35
ETFs S&P 500 High Yield Low Volatility ETF (ZYUS)	12.92	1.97%	0.12%	8.09%	8.10%	4.69%	7.70%	10.88%	0.35
ETFs Physical US Dollar ETF (ZUSD)	10.53	-0.98%	-2.49%	8.10%	4.07%	4.98%	1.21%	0.03%	0.30
ETFs Physical Gold (GOLD)	157.22	-1.51%	-3.27%	0.21%	-3.35%	-1.53%	1.85%	3.98%	0.40
ETFs Physical Silver (ETPMAG)	18.57	-1.16%	-3.94%	-10.00%	-10.25%	-11.13%	-7.50%	-0.38%	0.49
ETFs Physical Platinum (ETPMPPT)	105.00	-4.92%	-6.27%	-7.41%	-8.30%	-11.41%	-6.37%	-1.79%	0.49
ETFs Physical Palladium (ETPMPD)	157.17	4.53%	8.41%	21.67%	27.03%	23.42%	25.22%	29.86%	0.44
ETFs Physical Precious Metals Basket (ETPMPM)	128.31	-0.33%	-1.04%	1.92%	0.77%	0.65%	3.47%	6.91%	0.49

Source: Bloomberg. Data as at 30 November 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



¹ 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 $\text{Yield}(\text{period end}) - \text{Yield}(\text{period start})$.

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.

GET MORE INFORMATION

To sign up for future ETF Securities Weekly ETF Market Monitors, email infoAU@etfsecurities.com.au

To find out more about ETF Securities products, visit www.etfsecurities.com.au

CONTACT ETF Securities

Sales

Phone: +61 2 8311 3488
Email: infoAU@etfsecurities.com.au

Trading

Phone: +61 2 8311 3483
Email: 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

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

Larry Achike
Business Development Manager
Phone: +61 2 8311 3484
Mobile: +61 4 8800 8245
Email: larry.achike@etfsecurities.com.au

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

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

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

DISCLAIMER

This document is communicated by ETFS Management (AUS) Limited ("ETFS") (Australian Financial Services Licence Number 466778). This document may not be reproduced, distributed or published by any recipient for any purpose. Under no circumstances is this document to be used or considered as an offer to sell, or a solicitation of an offer to buy, any securities, investments or other financial instruments and any investments should only be made on the basis of the relevant product disclosure statement which should be considered by any potential investor including any risks identified therein.

This document does not take into account your personal needs and financial circumstances. You should seek independent financial, legal, tax and other relevant advice having regard to your particular circumstances. Although we use reasonable efforts to obtain reliable, comprehensive information, we make no representation and give no warranty that it is accurate or complete.

Investments in any product issued by ETFS are subject to investment risk, including possible delays in repayment and loss of income and principal invested. Neither ETFS, ETFS Capital Limited nor any other member of the ETFS Capital Group guarantees the performance of any products issued by ETFS or the repayment of capital or any particular rate of return therefrom.

The value or return of an investment will fluctuate and investor may lose some or all of their investment. Past performance is not an indication of future performance.



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