

ETF Securities Weekly ETF Market Monitor



ETFS Management (AUS) Limited

HIGHLIGHTS OF THE WEEK

for the week ending Friday, 7 September 2018

- The S&P/ASX 200 fell 2.8% last week, the RBA kept rates on hold and market futures are pointing towards a flat period ahead. Offshore the sea of red continued, the S&P 500 fell by 1.0% led by technology stocks, while the EURO STOXX 50 dropped 2.9%. Asian stocks, also fell by 2.4%. ETFS Physical Palladium (ETPMPD) and BetaShares Australian Equities Strong Bear (BBOZ) both had a strong week, returning 5.5% and 7.0% respectively.
- The U.S. dollar strengthened last week on rising global uncertainty in emerging markets. Currency pressure continuing to grow in emerging markets. Argentina, Turkey, Brazil, Russia and South Africa all continuing to drop. The Australian dollar fell 1.1% to US\$1.07c, its new lowest level since late-2016. U.S. 10-year Treasury yields increased by 8 basis points.
- Commodities were mixed. Gold ended the week marginally lower at US\$1,197/ounce, while Silver slumped 2.5%. WTI crude fell 2.9% to US\$67.75/bbl. The Bloomberg Commodities Industrial Metals subindex fell 1.4%.
- The Australian ETF market saw inflows of \$116m into and outflows of \$18m from domestically domiciled funds last week. The largest inflows were into equity ETFs (STW and NDQ) and domestic funds (MVW, QPO and HBRD). Outflows were spread across a range of different exposures.
- ETF Securities has launched ETFS Battery Tech & Lithium ETF (ACDC), which provides exposure to developers of battery storage technology and lithium miners. Trading on the ASX commenced on 3rd September.

	Price/ Yield	Price Return/ Change in Yield (%) ¹				Chart of the Week	
		Current	1W	1M	YTD	12M	YTD performance of Emerging Market Currency
S&P/ASX 200 Index	6,144	-2.78%	-1.76%	1.30%	7.98%		
Australian dollar/US dollar	0.7107	-1.14%	-4.23%	-8.99%	-11.68%		
Australian dollar/euro	0.6150	-0.76%	-3.88%	-5.47%	-8.11%		
Australian dollar/Japanese yen	78.87	-1.19%	-4.57%	-10.40%	-9.63%		
Aus 10 Year Govt Bond Yield	2.55%	0.03%	-0.11%	-0.08%	-0.09%		
S&P 500 Index	2,872	-1.03%	0.46%	7.41%	16.49%		
EURO STOXX 50 Index	3,293	-2.93%	-6.02%	-6.01%	-4.48%		
Nikkei 225 Index	22,307	-2.44%	-1.57%	-2.01%	15.01%		
Euro/US dollar	1.16	-0.42%	-0.40%	-3.77%	-3.91%		
US dollar/Japanese yen	110.99	-0.04%	-0.35%	-1.51%	2.34%		
US 10 Year Treasury Yield	2.94%	0.08%	-0.03%	0.53%	0.90%		
Gold (US\$/troy ounce)	1,197	-0.35%	-1.16%	-8.13%	-11.29%		
Silver (US\$/troy ounce)	14.17	-2.53%	-7.88%	-16.32%	-21.81%		
Platinum (US\$/ounce)	782	-0.70%	-5.69%	-15.73%	-23.18%		
Palladium (US\$/ounce)	980	-0.26%	7.71%	7.83%	2.34%		
WTI Crude (US\$/bbl)	67.75	-2.94%	-2.05%	12.13%	38.01%		
Bloomberg Commodity Index	82.59	-1.37%	-3.39%	-6.33%	-3.59%		

EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) ²	
BetaShares Australian Equities Strong Bear (BBOZ)	6.98%
ETFS Physical Palladium (ETPMPD)	5.46%
BetaShares Australian Equities Bear (BEAR)	2.87%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	2.19%
BetaShares Strong US Dollar Hedge Fund (YANK)	2.08%
Top 5 ETFs by 1 Month Total Return (%) ²	
ETFS Physical Palladium (ETPMPD)	10.85%
BetaShares Global Cybersecurity ETF (HACK)	9.84%
BetaShares Strong US Dollar Hedge Fund (YANK)	9.42%
iShares Core S&P SmallCap ETF (IJR)	6.30%
BetaShares S&P500 Yield Maximiser Fund (UMAX)	5.48%
Top 5 ETFs by 12 Month Total Return (%) ²	
iShares Core S&P SmallCap ETF (IJR)	47.81%
BetaShares Global Cybersecurity ETF (HACK)	47.80%
BetaShares NASDAQ 100 (NDQ)	40.67%
ETFS Morningstar Global Technology ETF (TECH)	40.63%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	40.36%

Bottom 5 ETFs by 1 Week Total Return (%) ²	
BetaShares Geared Australian Equity Fund (GEAR)	-5.96%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-3.45%
BetaShares WisdomTree Europe ETF (Hedged) (HEUR)	-3.16%
VanEck Vectors MSCI Multifactor Emerging Markets ETF (EMKI)	-2.97%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-2.93%
Bottom 5 ETFs by 1 Month Total Return (%) ²	
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-12.90%
VanEck Vectors Gold Miners ETF (GDX)	-9.98%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-9.95%
BetaShares Agricultural ETF - Ccy Hedged (QAG)	-6.75%
BetaShares WisdomTree Europe ETF (Hedged) (HEUR)	-5.68%
Bottom 5 ETFs by 12 Month Total Return (%) ²	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-34.40%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-28.82%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-26.84%
BetaShares Australian Equities Strong Bear (BBOZ)	-22.03%
VanEck Vectors Gold Miners ETF (GDX)	-20.47%

EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) ⁴	
SPDR S&P/ASX 200 Fund (STW)	17.7
BetaShares NASDAQ 100 (NDQ)	10.9
BetaShares Australian Bank Senior Floating Rate Bond ETF (QPON)	8.2
BetaShares Active Australian Hybrids Fund (HBRD)	7.7
VanEck Vectors MSCI World Ex-Australia ETF (QUAL)	7.1

Top 5 ETFs by 1 Week Out-Flows (A\$m) ⁴	
BetaShares U.S. Dollar ETF (USD)	-7.4
iShares S&P/ASX Dividend Opportunities Fund ETF (IHD)	-2.7
VanEck Vectors Small Cap Dividend Payers ETF (MVS)	-2.5
SPDR S&P World Ex Australia Fund (WOOZ)	-1.7
K2 Global Equities Fund (KII)	-0.8

ETF SECURITIES PRODUCT MONITOR

ETF Name (ASX Code)	NAV Current	Total Return (%) ²							MER ³ (%)
		1W	1M	YTD	6M	1Y	2Y	3Y	
ETFS Battery Tech & Lithium ETF (ACDC)	49.23	-2.13%	n/a	n/a	n/a	n/a	n/a	n/a	0.69
ETFS Global Core Infrastructure ETF (CORE)	54.54	0.79%	1.93%	7.42%	14.01%	n/a	n/a	n/a	0.45
ETFS EURO STOXX 50 ETF (ESTX)	62.28	-2.18%	-2.44%	1.74%	1.85%	6.51%	11.53%	n/a	0.35
ETFS ROBO Global Robotics and Automation ETF (ROBO)	59.47	-2.88%	4.24%	8.62%	4.87%	n/a	n/a	n/a	0.69
ETFS Morningstar Global Technology ETF (TECH)	72.08	-2.05%	3.83%	28.45%	14.08%	40.63%	n/a	n/a	0.45
ETFS S&P/ASX 100 ETF (ZOZI)	11.06	-2.41%	-0.73%	4.37%	6.16%	11.71%	10.74%	10.90%	0.24
ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	11.16	-1.12%	-0.56%	1.58%	3.26%	4.97%	11.12%	12.64%	0.35
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	13.26	1.25%	3.39%	10.08%	16.41%	19.36%	9.74%	13.05%	0.35
ETFS Physical US Dollar ETF (ZUSD)	10.73	1.23%	3.99%	10.16%	9.84%	13.37%	4.10%	-0.87%	0.30
ETFS Physical Gold (GOLD)	158.36	1.58%	2.70%	0.94%	-1.65%	-0.05%	-2.66%	0.85%	0.40
ETFS Physical Palladium (ETPMPD)	131.05	5.46%	10.85%	1.44%	9.23%	16.29%	22.33%	17.25%	0.49
ETFS Physical Platinum (ETPMPPT)	103.56	-0.16%	3.49%	-8.68%	-11.79%	-13.77%	-13.25%	-9.07%	0.49
ETFS Physical Precious Metal Basket (ETPMPM)	123.84	1.64%	2.28%	-1.63%	-1.58%	-0.61%	-2.17%	1.81%	0.44
ETFS Physical Silver (ETPMAG)	18.93	-1.48%	-4.75%	-8.25%	-7.10%	-10.77%	-12.97%	-2.32%	0.49

Source: Bloomberg. Data as at 7 September 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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