

ETF Securities Weekly ETF Market Monitor



ETFS Management (AUS) Limited

HIGHLIGHTS OF THE WEEK

for the week ending Friday, 28 September 2018

- The S&P/ASX 200 added 0.2% last week as gains in energy and resources sectors offset declines in financials. Offshore the S&P 500 dropped 0.5% with financials underperforming following the Fed's 0.25% rate hike. BetaShares Global Banks ETF (Hedged) (BNKS) was the poorest performing ETF for the week, falling 2.8%. The EURO STOXX 50 fell 0.9% as Italy came under pressure. Japan's Nikkei 225 gained 1.1%, hitting levels not seen since 1991. Technology-biased funds (HACK and NDQ) were the top performing equity funds for the week.
- The U.S. dollar strengthened last week following the Fed action; the Australian dollar fell 0.9% to US\$2.24c, the euro fell 1.2%, while the yen fell 1.0%.
- Commodities generally strengthened with the broad Bloomberg Commodities Index gaining 1.0%. WTI crude added 3.5% for the week, while gold ended the week lower at US\$1,191/ounce. ETFS Physical Palladium (ETPMPD) was the top performing ETF for the week, followed by BetaShares Crude Oil Index ETF (OOO).
- The Australian ETF market saw inflows of \$192m into and outflows of \$38m from domestically domiciled funds last week. The largest inflows were into global equity ETFs (IHWL and IWLD) and fixed income ETFs (CRED and QPON). The largest outflows were from BetaShares Australian High Interest Cash ETF (AAA) and iShares Core S&P 500 ETF (IVV).

	Price/ Yield	Price Return/ Change in Yield (%) ¹				Chart of the Week	
		Current	1W	1M	YTD	12M	YTD return of global currencies against USD
S&P/ASX 200 Index	6,208	0.21%	-1.54%	2.35%	0.47%		
Australian dollar/US dollar	0.7224	-0.91%	-1.55%	-7.49%	-8.04%		
Australian dollar/euro	0.6224	0.32%	-0.81%	-4.33%	-6.63%		
Australian dollar/Japanese yen	82.13	0.05%	0.65%	-6.70%	-6.96%		
Aus 10 Year Govt Bond Yield	2.67%	-0.03%	0.11%	0.04%	-0.19%		
S&P 500 Index	2,914	-0.54%	0.57%	8.99%	16.09%		
EURO STOXX 50 Index	3,399	-0.92%	-1.40%	-2.99%	-4.61%		
Nikkei 225 Index	24,120	1.05%	5.73%	5.95%	18.45%		
Euro/US dollar	1.16	-1.23%	-0.78%	-3.34%	-1.54%		
US dollar/Japanese yen	113.70	0.99%	2.26%	0.90%	1.21%		
US 10 Year Treasury Yield	3.06%	0.00%	0.18%	0.66%	0.75%		
Gold (US\$/troy ounce)	1,191	-0.76%	-0.84%	-8.59%	-7.49%		
Silver (US\$/troy ounce)	14.66	2.46%	-0.36%	-13.47%	-13.19%		
Platinum (US\$/ounce)	816	-1.46%	3.33%	-12.10%	-11.78%		
Palladium (US\$/ounce)	1,075	2.11%	14.26%	1.08%	15.31%		
WTI Crude (US\$/bbl)	73.25	3.49%	6.89%	21.23%	42.07%		
Bloomberg Commodity Index	85.20	0.95%	2.21%	-3.36%	0.67%		

EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) ²	
ETFS Physical Palladium (ETPMPD)	5.45%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	3.52%
BetaShares Global Cybersecurity ETF (HACK)	2.17%
BetaShares NASDAQ 100 (NDQ)	2.01%
BetaShares Strong US Dollar Hedge Fund (YANK)	1.71%
Top 5 ETFs by 1 Month Total Return (%) ²	
ETFS Physical Palladium (ETPMPD)	16.49%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	7.24%
BetaShares WisdomTree Japan ETF (Hedged) (HJPN)	5.18%
iShares MSCI Japan ETF (IJP)	5.02%
UBS IQ MSCI Japan Ethical ETF (UBJ)	4.89%
Top 5 ETFs by 12 Month Total Return (%) ²	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	46.41%
BetaShares Global Cybersecurity ETF (HACK)	41.35%
BetaShares NASDAQ 100 (NDQ)	39.78%
ETFS Morningstar Global Technology ETF (TECH)	37.01%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	36.63%

Bottom 5 ETFs by 1 Week Total Return (%) ²	
BetaShares Global Banks ETF (Hedged) (BNKS)	-2.81%
BetaShares Gold Bullion ETF - Ccy Hedged (QAU)	-2.00%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-1.96%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	-1.42%
BetaShares Agricultural ETF - Ccy Hedged (QAG)	-1.38%
Bottom 5 ETFs by 1 Month Total Return (%) ²	
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-3.66%
BetaShares Geared Australian Equity Fund (GEAR)	-2.96%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-2.70%
ETFS Physical Silver (ETPMAG)	-2.57%
VanEck Vectors Small Cap Dividend Payers ETF (MVS)	-2.57%
Bottom 5 ETFs by 12 Month Total Return (%) ²	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-33.45%
BetaShares Australian Equities Strong Bear (BBOZ)	-24.58%
BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-21.26%
BetaShares Strong Australian Dollar Hedge Fund (AUDS)	-20.15%
VanEck Vectors Gold Miners ETF (GDX)	-12.63%

EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) ⁴	
iShares Core MSCI World All Cap ETF (Hedged) (IHWL)	44.0
BetaShares Australian Investment Grade Corporate Bond ETF (CRED)	29.9
iShares Core MSCI World All Cap ETF (IWLD)	14.0
iShares S&P/ASX 200 ETF (IOZ)	13.5
BetaShares Australian Bank Senior Floating Rate Bond ETF (QPON)	10.2

Top 5 ETFs by 1 Week Out-Flows (A\$m) ⁴	
BetaShares Australian High Interest Cash ETF (AAA)	-20.1
iShares Core S&P 500 (IVV)	-7.4
iShares S&P/ASX Dividend Opportunities Fund ETF (IHD)	-2.7
SPDR S&P/ASX 200 Resources Fund (OZR)	-2.2
iShares Global Corporate Bond (AUD Hedged) ETF (IHCB)	-2.1

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)	50.82	-0.51%	1.63%	n/a	n/a	n/a	n/a	n/a	n/a	0.69
ETFS Global Core Infrastructure ETF (CORE)	53.83	0.13%	1.58%	6.81%	9.10%	9.02%	n/a	n/a	n/a	0.45
ETFS EURO STOXX 50 ETF (ESTX)	63.70	-1.33%	-0.67%	4.06%	4.06%	4.65%	14.67%	n/a	n/a	0.35
ETFS ROBO Global Robotics and Automation ETF (ROBO)	60.02	-1.16%	-0.15%	9.63%	8.03%	18.28%	n/a	n/a	n/a	0.69
ETFS Morningstar Global Technology ETF (TECH)	72.07	0.79%	0.10%	28.44%	20.20%	37.01%	n/a	n/a	n/a	0.45
ETFS S&P/ASX 100 ETF (ZOZI)	11.01	0.14%	-0.89%	5.56%	9.35%	13.15%	11.39%	10.64%	0.24	0.24
ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	11.04	-0.38%	-0.54%	1.88%	5.90%	6.67%	11.43%	12.14%	0.35	0.35
ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	12.94	-1.13%	0.43%	8.24%	13.77%	12.94%	9.12%	12.31%	0.35	0.35
ETFS Physical US Dollar ETF (ZUSD)	10.60	0.75%	1.62%	8.85%	6.54%	9.20%	3.32%	-0.93%	0.30	0.30
ETFS Physical Gold (GOLD)	154.84	-0.24%	-0.61%	-1.31%	-5.76%	-0.22%	-2.96%	0.09%	0.40	0.40
ETFS Physical Palladium (ETPMPD)	144.14	5.45%	16.49%	11.58%	18.38%	27.03%	27.83%	16.99%	0.49	0.49
ETFS Physical Platinum (ETPMPT)	107.38	-0.98%	2.74%	-5.31%	-8.24%	-4.34%	-8.44%	-5.56%	0.49	0.49
ETFS Physical Precious Metal Basket (ETPMPM)	125.30	1.09%	2.78%	-0.47%	-1.83%	2.83%	-0.42%	2.00%	0.44	0.44
ETFS Physical Silver (ETPMAG)	18.85	0.55%	-2.57%	-8.65%	-8.09%	-8.36%	-11.49%	-2.49%	0.49	0.49

Source: Bloomberg. Data as at 28 September 2018.



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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.

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