

# ANZ ETFS WEEKLY ETF MARKET MONITOR

ANZ ETFS Management (Aus) Limited

## HIGHLIGHTS OF THE WEEK

for the week ending Friday, 29 July 2016

- Global equities mostly trended sideways last week, with the S&P/ASX 200 gaining 1.2%, the EURO STOXX 50 adding 0.6% and the S&P 500 ending the week slightly lower. Mining and resource sector ETFs rebounded, with VanEck Vectors Gold Miners ETF (GDX) returning 3.8%, taking its year-to-date total return to 113.1%.
- Precious metals returned to favour with gold gaining 1.6% and silver 1.7%. ETFS Physical Platinum (ETPMPT) was the top performing commodity ETF, returning 2.8% for the week, while ETFS Physical Palladium (ETPMPD) has returned 18.8% over the past month.
- The Australian dollar gained 1.8%, ending just below US 76c ahead of today's RBA rate announcement. The Japanese yen continued its volatile year, gaining 3.8% against the US dollar. Year-to-date the yen has gained 15.1% on the back of multiple stimulus packages.
- The Australian ETF market saw A\$65m in inflows and A\$68m of outflows from domestically domiciled ETFs for the week.

## GLOBAL MARKET DATA MONITOR

Index Name	Price/ Yield	Price Return/ Change in Yield (%) <sup>1</sup>				Chart of the Week	
	Current	1W	1M	YTD	12M	Year-to-date performance of AUD against major currencies	
S&P/ASX 200 Index	5,562	1.17%	8.17%	5.03%	-1.10%		
All Ordinaries Index	5,644	1.25%	8.10%	5.60%	0.61%		
Australian dollar/US dollar	0.7596	1.80%	1.95%	4.25%	4.13%		
Australian dollar/euro	0.6801	0.06%	1.54%	1.34%	2.41%		
Australian dollar/Japanese yen	77.53	-2.12%	1.18%	-11.49%	-14.26%		
Aus 10 Year Govt Bond Yield	1.87%	-0.03%	-0.13%	-1.01%	-0.92%		
S&P 500 Index	2,174	-0.07%	4.97%	6.34%	3.08%		
EURO STOXX 50 Index	2,991	0.62%	5.60%	-8.47%	-16.35%		
Nikkei 225 Index	16,569	-0.35%	6.44%	-12.95%	-18.39%		
Hang Seng Index	21,891	-0.33%	7.12%	-0.11%	-11.08%		
Euro/US dollar	1.12	1.79%	0.44%	2.87%	1.73%		
US dollar/Japanese yen	102.06	-3.83%	-0.75%	-15.11%	-17.65%		
US 10 Year Treasury Yield	1.45%	-0.11%	-0.06%	-0.82%	-0.83%		
Gold (US\$/troy ounce)	1,342	1.61%	1.55%	26.60%	23.09%		
Silver (US\$/troy ounce)	20.04	1.73%	10.05%	45.01%	37.17%		
WTI Crude (US\$/bbl)	41.60	-5.86%	-16.60%	12.31%	-14.74%		
Iron Ore (US\$/metric tonne)	59.37	6.26%	10.17%	36.26%	6.23%		

## EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
VanEck Vectors Gold Miners ETF (GDX)	3.80%
Aurora Dividend Income Trust (AOD) <sup>3</sup>	3.30%
ETFS Physical Platinum (ETPMPT)	2.76%
BetaShares Geared Australian Equity Fund (GEAR)	2.65%
VanEck Vectors Small Cap Dividend Payers ETF (MVS)	1.88%
Top 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
ETFS Physical Palladium (ETPMPD)	18.80%
BetaShares Geared Australian Equity Fund (GEAR)	17.43%
BetaShares Geared US Equity Fund - Ccy Hedged (GGUS)	12.13%
ETFS Physical Platinum (ETPMPT)	12.12%
VanEck Vectors Australian Emerging Resources ETF (MVE)	11.30%
Top 5 ETFs by Year-To-Date Total Return (%) <sup>2</sup>	
VanEck Vectors Gold Miners ETF (GDX)	113.09%
VanEck Vectors Australian Emerging Resources ETF (MVE)	50.53%
ETFS Physical Silver (ETPMAG)	38.41%
VanEck Vectors Australian Resources ETF (MVR)	26.94%
ETFS Physical Platinum (ETPMPT)	25.69%
Top 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
VanEck Vectors Gold Miners ETF (GDX)	112.52%
VanEck Vectors Australian Emerging Resources ETF (MVE)	32.31%
ETFS Physical Silver (ETPMAG)	31.25%
Vanguard Australian Property Securities Index ETF (VAP)	24.72%
SPDR S&P/ASX 200 Listed Property Fund (SLF)	24.45%

Bottom 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-5.87%
iShares MSCI Singapore ETF (ISG)	-3.46%
iShares China Large-Cap ETF (IZZ)	-2.87%
BetaShares FTSE RAFI US 1000 ETF (QUS)	-2.33%
BetaShares Global Energy Companies ETF (Hedged) (FUEI)	-2.33%
Bottom 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-18.04%
BetaShares Australian Equities Strong Bear (BBOZ)	-17.58%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-11.56%
BetaShares Agricultural ETF - Ccy Hedged (QAG)	-8.28%
BetaShares Australian Equities Bear (BEAR)	-8.09%
Bottom 5 ETFs by Year-To-Date Total Return (%) <sup>2</sup>	
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-19.96%
VanEck Vectors ChinaAMC A-Share ETF (CETF)	-18.05%
BetaShares Australian Equities Strong Bear (BBOZ)	-16.72%
BetaShares British Pound ETF (POU)	-13.83%
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-11.64%
Bottom 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-40.19%
VanEck Vectors ChinaAMC A-Share ETF (CETF)	-25.55%
BetaShares British Pound ETF (POU)	-18.54%
iShares China Large-Cap ETF (IZZ)	-14.81%
BetaShares Australian Equities Strong Bear (BBOZ)	-14.67%

## EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) <sup>4</sup>	
VanEck Vectors Australian Emerging Resources ETF (MVE)	19.0
BetaShares Australian High Interest Cash ETF (AAA)	18.1
VanEck Vectors MSCI World Ex-Australia ETF (QUAL)	5.3
BetaShares Australian Dividend Harvester Fund (HVST)	4.4
BetaShares Australian Equities Strong Bear (BBOZ)	3.2

Top 5 ETFs by 1 Week Out-Flows (A\$m) <sup>4</sup>	
SPDR S&P/ASX 200 Fund (STW)	-36.3
VanEck Vectors Australian Equal Weight ETF (MWV)	-17.3
BetaShares Geared Australian Equity Fund (GEAR)	-13.8
K2 Global Equities Fund (KII)	-0.6
	n/a

## ANZ ETFS PRODUCT MONITOR

ETF Name (ASX Code)	NAV	Total Return (%) <sup>2</sup>					Inception Date	MER <sup>5</sup> (%)	
	Current	1W	1M	6M	YTD	12M			Since Incep.
ANZ ETFS S&P/ASX 100 ETF (ZOZI)	10.20	1.15%	8.08%	12.97%	6.79%	2.34%	5.70%	09-Jun-15	0.24
ANZ ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	10.27	1.34%	8.28%	11.40%	6.35%	4.50%	6.36%	09-Jun-15	0.35
ANZ ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	12.58	-1.53%	4.06%	14.10%	16.58%	21.20%	30.29%	09-Jun-15	0.35
ANZ ETFS Physical US Dollar ETF (ZUSD)	10.05	-2.03%	-2.19%	-7.11%	-4.49%	-4.24%	1.35%	09-Jun-15	0.30
ANZ ETFS Physical Renminbi ETF (ZCNH)	9.40	-1.37%	-1.90%	-7.72%	-5.51%	-10.36%	-5.22%	09-Jun-15	0.30
ANZ ETFS Physical Gold ETF (ZGOL)	17.45	-1.35%	-1.10%	11.21%	19.80%	16.36%	14.54%	09-Jun-15	0.40
ANZ ETFS EURO STOXX 50 ETF (ESTX)	51.06	0.46%	n/a	n/a	n/a	n/a	2.11%	19-Jul-16	0.35

Source: Bloomberg. Data as at 29 July 2016.



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<sup>1</sup> 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  $\text{Yield}(\text{period end}) - \text{Yield}(\text{period start})$ .

<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 NAV's or have not published NAV's on Bloomberg as at the publication time, last traded price is used as a proxy for any unavailable NAVs.

<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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