

# ANZ ETFS WEEKLY ETF MARKET MONITOR

ANZ ETFS Management (AUS) Limited

## HIGHLIGHTS OF THE WEEK

for the week ending Friday, 16 September 2016

- Global equity markets declined last week with the S&P/ASX 200 losing 0.8%, the Nikkei 225 down 2.6% and the EURO STOXX 50 falling 3.9%. The S&P 500 added 0.5% and the NASDAQ 100 gained 2.9%. BetaShares NASDAQ 100 ETF (NDQ) was the best performing ETF for the week, returning 4.1% in Australian dollar terms.
- WTI crude dropped 6.2% and iron ore fell 3.1%. Precious metals also retreated for the week, with gold down 1.7% and silver down 2.6%. Commodity and resource sectors ETFs were amongst the poorest performers for the week.
- The Australian dollar fell below US 75c. Positive data out of China in recent weeks has seen the Renminbi gain against the Australian dollar in four of the past five weeks. ANZ ETFS Physical Renminbi ETF returned 1.8% for the week and 2.3% for the past month.
- The Australian ETF market saw inflows of A\$91m into domestically domiciled ETFs across a range of different exposures.

## 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	3 month performance of Chinese Renminbi against USD and AUD	
S&P/ASX 200 Index	5,297	-0.80%	-4.25%	0.02%	3.88%		
All Ordinaries Index	5,397	-0.80%	-4.07%	0.98%	5.33%		
Australian dollar/US dollar	0.7491	-0.66%	-2.65%	2.81%	4.09%		
Australian dollar/euro	0.6711	-0.03%	-1.64%	0.00%	5.27%		
Australian dollar/Japanese yen	76.60	-1.08%	-0.77%	-12.56%	-11.72%		
Aus 10 Year Govt Bond Yield	2.11%	0.14%	0.23%	-0.77%	-0.69%		
S&P 500 Index	2,139	0.53%	-1.79%	4.66%	7.21%		
EURO STOXX 50 Index	2,935	-3.86%	-2.68%	-10.17%	-9.73%		
Nikkei 225 Index	16,519	-2.63%	-0.47%	-13.21%	-9.09%		
Hang Seng Index	23,336	-3.17%	1.85%	6.49%	6.23%		
Euro/US dollar	1.12	-0.69%	-1.10%	2.70%	-1.20%		
US dollar/Japanese yen	102.29	-0.39%	1.97%	-14.91%	-15.16%		
US 10 Year Treasury Yield	1.69%	0.02%	0.12%	-0.58%	-0.60%		
Gold (US\$/troy ounce)	1,308	-1.69%	-2.65%	23.43%	17.07%		
Silver (US\$/troy ounce)	18.91	-2.58%	-5.62%	36.83%	30.32%		
WTI Crude (US\$/bbl)	43.03	-6.21%	-7.62%	16.17%	-8.74%		
Iron Ore (US\$/metric tonne)	55.97	-3.13%	-9.77%	28.46%	-2.17%		

## EXCHANGE TRADED FUNDS PERFORMANCE MONITOR

Top 5 ETFs by 1 Week Total Return (%) <sup>2</sup>		Bottom 5 ETFs by 1 Week Total Return (%) <sup>2</sup>	
BetaShares NASDAQ 100 (NDQ)	4.09%	BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-6.16%
VanEck Vectors MSCI World Ex-Australia ETF (QUAL)	2.01%	ETFS Physical Platinum (ETPMPT)	-4.63%
iShares Global Healthcare ETF (IXJ)	1.85%	BetaShares S&P/ASX 200 Resources Sector ETF (QRE)	-3.52%
ANZ ETFS Physical Renminbi ETF (ZCNH)	1.80%	SPDR S&P/ASX 200 Resources Fund (OZR)	-3.49%
UBS IQ MSCI USA Ethical ETF (UBU)	1.75%	BetaShares Global Banks ETF (Hedged) (BNKS)	-3.40%
Top 5 ETFs by 1 Month Total Return (%) <sup>2</sup>		Bottom 5 ETFs by 1 Month Total Return (%) <sup>2</sup>	
BetaShares Australian Equities Strong Bear (BBOZ)	7.71%	BetaShares Global Gold Miners ETF (Hedged) (MNRS)	-14.36%
iShares MSCI Hong Kong ETF (IHK)	5.53%	VanEck Vectors Gold Miners ETF (GDX)	-14.00%
BetaShares US Equities Strong Bear HF - Hedged (BBUS)	4.24%	BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-8.88%
UBS IQ MSCI Asia APREX 50 Ethical ETF (UBP)	3.88%	BetaShares Geared Australian Equity Fund (GEAR)	-8.01%
BetaShares British Pound ETF (POU)	3.48%	VanEck Vectors Australian Property ETF (MVA)	-7.86%
Top 5 ETFs by Year-To-Date Total Return (%) <sup>2</sup>		Bottom 5 ETFs by Year-To-Date Total Return (%) <sup>2</sup>	
VanEck Vectors Gold Miners ETF (GDX)	82.65%	BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-17.37%
VanEck Vectors S&P/ASX MidCap ETF (MVE)	46.92%	VanEck Vectors ChinaAMC A-Share ETF (CETF)	-16.06%
ETFS Physical Silver (ETPMAG)	32.56%	BetaShares British Pound ETF (POU)	-13.82%
BetaShares Gold Bullion ETF - Ccy Hedged (QAU)	23.45%	BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-10.17%
SPDR S&P/ASX 200 Resources Fund (OZR)	21.02%	BetaShares Australian Equities Strong Bear (BBOZ)	-9.10%
Top 5 ETFs by 12 Month Total Return (%) <sup>2</sup>		Bottom 5 ETFs by 12 Month Total Return (%) <sup>2</sup>	
VanEck Vectors Gold Miners ETF (GDX)	80.36%	BetaShares Crude Oil Index ETF - Ccy Hedged (OOO)	-35.53%
VanEck Vectors S&P/ASX MidCap ETF (MVE)	49.24%	BetaShares US Equities Strong Bear HF - Hedged (BBUS)	-23.93%
SPDR S&P/ASX Small Ordinaries Fund (SSO)	27.90%	BetaShares Australian Equities Strong Bear (BBOZ)	-20.51%
iShares S&P/ASX Small Ordinaries ETF (ISO)	27.47%	BetaShares British Pound ETF (POU)	-19.11%
ETFS Physical Silver (ETPMAG)	24.63%	BetaShares Commodities Basket ETF - Ccy Hedged (QCB)	-11.66%

## EXCHANGE TRADED FUNDS FLOW MONITOR

Top 5 ETFs by 1 Week In-Flows (A\$m) <sup>4</sup>		Top 5 ETFs by 1 Week Out-Flows (A\$m) <sup>4</sup>	
BetaShares Australian High Interest Cash ETF (AAA)	30.2	K2 Global Equities Fund (KII)	-0.2
SPDR S&P/ASX 200 Fund (STW)	19.8		n/a
BetaShares Australian Dividend Harvester Fund (HVST)	10.4		n/a
ANZ ETFS Physical US Dollar ETF (ZUSD)	8.2		n/a
BetaShares Australian Equities Bear (BEAR)	5.9		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)	9.82	-0.74%	-3.27%	4.98%	2.64%	6.93%	1.59%	09-Jun-15	0.24
ANZ ETFS S&P/ASX 300 High Yield Plus ETF (ZYAU)	10.21	-1.33%	-1.40%	10.06%	5.78%	12.35%	5.79%	09-Jun-15	0.35
ANZ ETFS S&P 500 High Yield Low Volatility ETF (ZYUS)	12.30	1.48%	0.25%	5.62%	13.95%	19.10%	27.36%	09-Jun-15	0.35
ANZ ETFS Physical US Dollar ETF (ZUSD)	10.20	1.12%	2.57%	-0.81%	-3.04%	-4.27%	2.89%	09-Jun-15	0.30
ANZ ETFS Physical Renminbi ETF (ZCNH)	9.52	1.80%	2.31%	-2.74%	-4.27%	-7.90%	-3.99%	09-Jun-15	0.30
ANZ ETFS Physical Gold ETF (ZGOL)	17.47	-0.50%	-0.09%	5.68%	19.93%	13.36%	14.67%	09-Jun-15	0.40
ANZ ETFS EURO STOXX 50 ETF (ESTX)	50.81	-3.16%	-1.03%	n/a	n/a	n/a	1.62%	19-Jul-16	0.35

Source: Bloomberg. Data as at 16 September 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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