

Thematics Monthly Monitor

September 2024



STOXX Thematic Solutions Capture Megatrends Across Three Broad Categories

Megatrends – powerful, transformative forces that could change the global economy, business and society

Environment

Benefit from the increasing societal awareness of environmental and sustainability issues that are impacting our quality of life



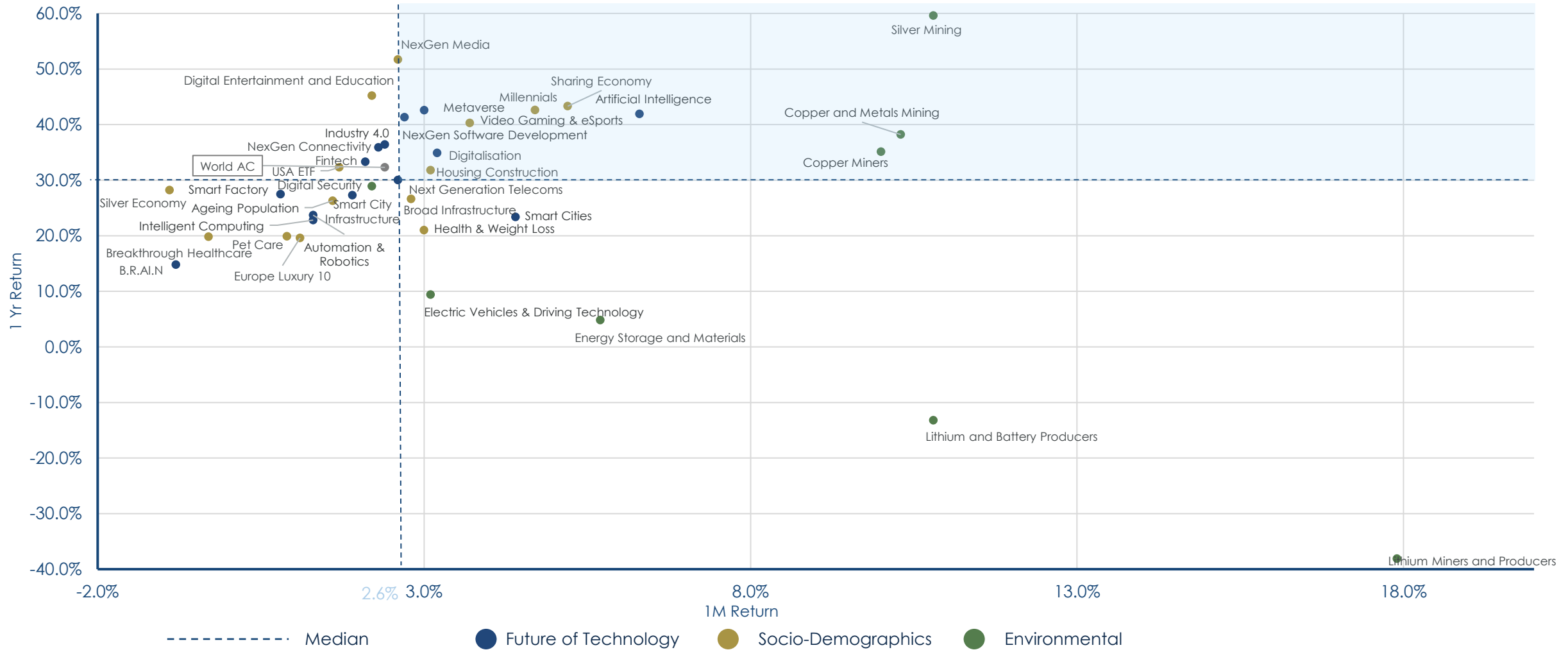
Future Technology

Technological advancements that are changing our daily lives

Socio-demographics

Changes in global demographics will bring significant challenges and opportunities for societies and businesses

STOXX Thematic Indices Performance Overview



Source: STOXX, Daily data Sep 29, 2023 to Sep 30, 2024, USD GR

STOXX Thematic Indices

Performance & Risk Characteristics

Future of Technology	Returns				Risk				Dividend Yield		Sharpe Ratio	
	1M	YTD	1Y	3Y	1M	YTD	1Y	3Y	1Y	3Y	1Y	3Y
STOXX Global Artificial Intelligence	6.3%	22.4%	41.9%	11.8%	24.1%	23.1%	21.9%	29.2%	1.0%	1.2%	1.73	0.53
STOXX Global Automation & Robotics	1.3%	3.8%	23.7%	1.4%	21.0%	18.1%	17.7%	22.4%	1.0%	0.9%	1.31	0.17
STOXX Global Digital Security	1.9%	12.4%	27.3%	4.2%	12.5%	15.8%	15.9%	20.1%	1.1%	1.0%	1.61	0.30
STOXX Global Digitalisation	3.2%	16.2%	34.9%	-2.2%	13.6%	14.1%	14.9%	22.5%	1.0%	0.7%	2.10	0.01
STOXX Global Fintech	2.1%	13.1%	33.3%	-1.1%	11.1%	13.5%	14.0%	21.1%	1.3%	0.9%	2.14	0.05
STOXX Global Industry 4.0	2.4%	13.1%	36.4%	7.3%	20.2%	19.1%	18.4%	22.4%	1.8%	1.7%	1.80	0.43
STOXX Global Intelligent Computing	1.3%	2.0%	22.8%	2.4%	18.7%	18.2%	18.2%	19.1%	1.5%	1.5%	1.23	0.22
STOXX Global Metaverse	3.0%	16.0%	42.6%	7.9%	17.9%	19.3%	18.5%	23.7%	1.1%	1.1%	2.03	0.44
STOXX Global Next Generation Telecoms	2.6%	11.9%	30.0%	6.1%	14.6%	14.7%	14.2%	16.2%	3.1%	2.8%	1.93	0.45
STOXX Global Smart Cities	4.4%	4.8%	23.4%	2.7%	23.5%	24.6%	24.1%	28.2%	0.6%	0.8%	1.00	0.24
STOXX Global Smart Factory	0.8%	5.3%	27.5%	6.3%	28.7%	24.2%	23.0%	25.6%	1.5%	1.6%	1.18	0.36
STOXX World AC NexGen Connectivity	2.3%	15.7%	35.9%	8.2%	15.6%	15.8%	15.1%	17.2%	2.6%	2.5%	2.12	0.54
STOXX World AC NexGen Software Development	2.7%	18.2%	41.3%	11.1%	24.1%	23.5%	22.4%	28.5%	0.7%	0.8%	1.67	0.51
iSTOXX Developed Markets B.R.AI.N	-0.8%	3.2%	14.8%	7.2%	17.2%	14.6%	14.5%	18.2%	1.5%	1.5%	1.03	0.47
Category Average	2.4%	11.3%	31.1%	5.2%	18.8%	18.5%	18.1%	22.5%	1.4%	1.4%	1.6	0.3

Environmental	Returns				Risk				Dividend Yield		Sharpe Ratio	
	1M	YTD	1Y	3Y	1M	YTD	1Y	3Y	1Y	3Y	1Y	3Y
STOXX Global Copper and Metals Mining	10.3%	26.0%	38.2%	18.6%	38.3%	27.6%	27.4%	29.8%	3.2%	5.6%	1.33	0.72
STOXX Global Copper Miners	10.0%	24.8%	35.1%	15.9%	38.5%	27.7%	27.6%	30.9%	3.5%	4.6%	1.24	0.63
STOXX Global Electric Vehicles & Driving Technology	3.1%	3.4%	9.4%	0.9%	24.7%	18.8%	18.9%	21.1%	2.1%	1.7%	0.57	0.15
STOXX Global Energy Storage and Materials	5.7%	0.1%	4.8%	-8.0%	18.9%	17.3%	18.3%	20.6%	1.9%	1.5%	0.35	-0.30
STOXX Global Lithium and Battery Producers	10.8%	-10.9%	-13.2%	-10.9%	34.8%	23.8%	24.8%	26.5%	1.1%	1.0%	-0.45	-0.30
STOXX Global Lithium Miners and Producers	17.9%	-32.8%	-38.1%	-23.8%	53.6%	33.7%	33.8%	33.9%	0.6%	0.4%	-1.26	-0.63
STOXX Global Silver Mining	10.8%	35.7%	59.6%	9.1%	47.8%	37.0%	36.3%	36.0%	1.8%	1.6%	1.48	0.42
STOXX Global Smart City Infrastructure	2.2%	14.4%	28.9%	4.7%	14.8%	13.8%	14.4%	16.5%	1.9%	1.7%	1.86	0.36
Category Average	8.9%	7.6%	15.6%	0.8%	33.9%	25.0%	25.2%	26.9%	2.0%	2.3%	0.6	0.1

Source: STOXX, Daily data Sep 30, 2021 to Sep 30, 2024, USD GR

STOXX Thematic Indices

Performance & Risk Characteristics

Social Demographics	Returns				Risk				Dividend Yield		Sharpe Ratio	
	1M	YTD	1Y	3Y	1M	YTD	1Y	3Y	1Y	3Y	1Y	3Y
STOXX Global Ageing Population	1.6%	14.3%	26.3%	2.0%	9.8%	11.5%	12.5%	15.4%	2.5%	2.0%	1.95	0.20
STOXX Global Breakthrough Healthcare	-0.3%	7.7%	19.8%	-6.8%	11.1%	13.3%	15.0%	19.8%	0.9%	0.5%	1.29	-0.26
STOXX Global Broad Infrastructure	2.8%	13.6%	26.6%	5.5%	6.7%	9.2%	10.0%	12.2%	4.4%	3.6%	2.43	0.50
STOXX Global Digital Entertainment and Education	2.2%	20.2%	45.2%	5.2%	16.8%	17.2%	17.0%	23.1%	1.1%	1.1%	2.31	0.33
STOXX Global Health & Weight Loss	3.0%	10.0%	21.0%	-5.7%	12.3%	14.2%	14.6%	18.2%	1.4%	1.0%	1.39	-0.23
STOXX Global Housing Construction	3.1%	10.5%	31.8%	7.5%	22.0%	19.3%	19.0%	20.9%	2.1%	2.2%	1.56	0.45
STOXX Global Millennials	4.7%	24.1%	42.6%	4.7%	13.7%	14.7%	14.8%	23.4%	0.8%	0.6%	2.50	0.31
STOXX Global Pet Care	0.9%	8.7%	19.9%	2.0%	8.7%	10.8%	11.3%	14.0%	2.3%	1.8%	1.67	0.21
STOXX Global Sharing Economy	5.2%	23.7%	43.3%	2.9%	14.5%	15.2%	16.0%	25.5%	0.6%	0.4%	2.36	0.24
STOXX Global Silver Economy	-0.9%	13.2%	28.2%	5.7%	13.1%	13.5%	13.8%	19.3%	1.5%	1.4%	1.89	0.38
STOXX Global Video Gaming & eSports	3.7%	19.9%	40.3%	11.0%	16.8%	18.0%	17.4%	21.5%	1.2%	1.3%	2.06	0.59
STOXX World AC NexGen Media	2.6%	27.2%	51.7%	11.1%	18.9%	19.2%	18.4%	25.9%	1.0%	0.9%	2.37	0.53
STOXX Europe Luxury 10	1.1%	9.2%	19.6%	9.5%	37.2%	23.0%	22.9%	29.3%	2.1%	2.0%	0.90	0.46
STOXX USA ETF Industry	1.7%	12.3%	32.3%	5.8%	10.0%	12.5%	13.6%	20.2%	2.7%	2.3%	2.15	0.38
Category Average	2.2%	15.3%	32.0%	4.3%	15.1%	15.1%	15.5%	20.6%	1.8%	1.5%	1.9	0.3

Source: STOXX, Daily data Sep 30, 2021 to Sep 30, 2024, USD GR

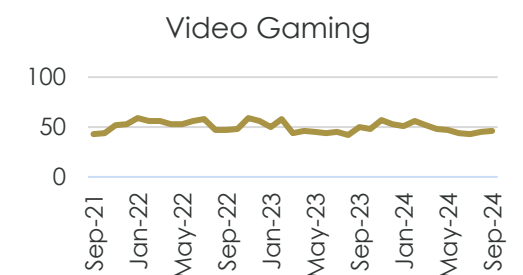
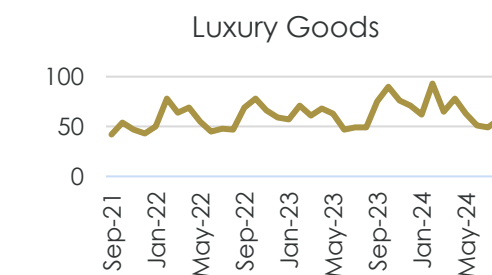
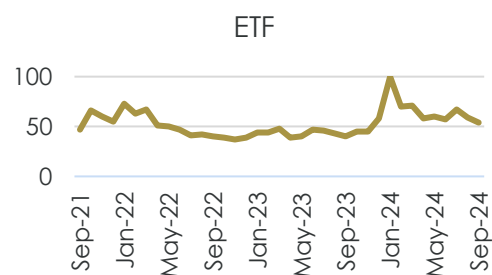
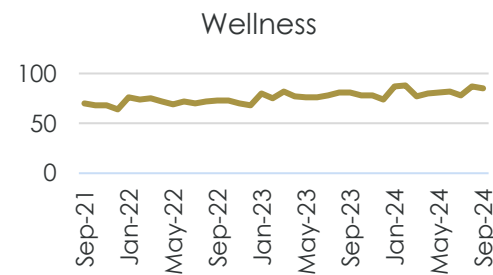
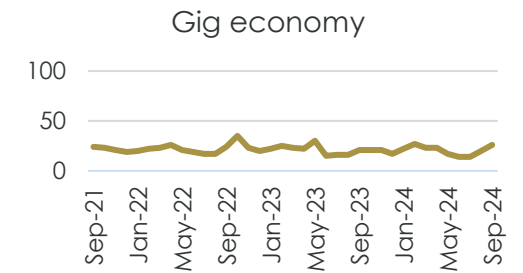
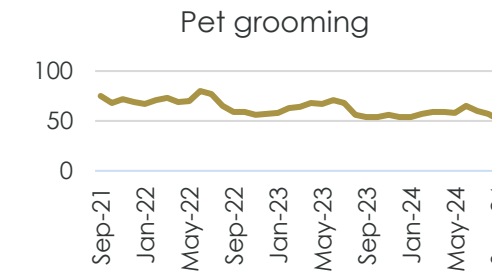
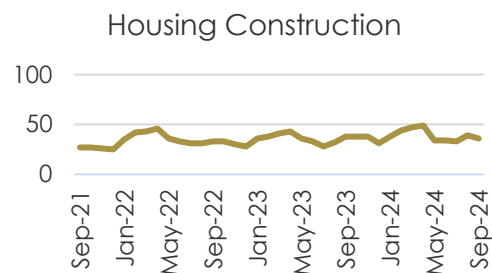
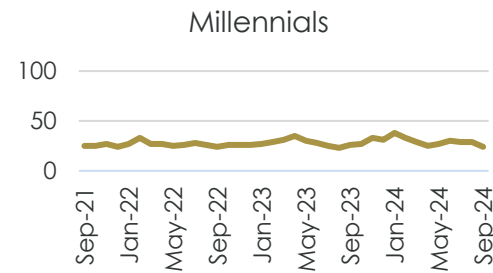
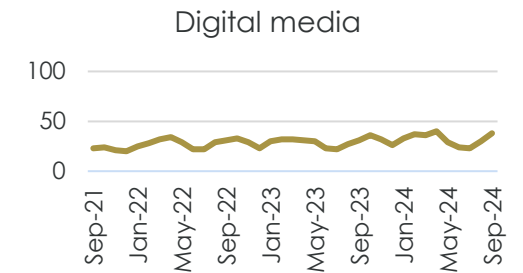
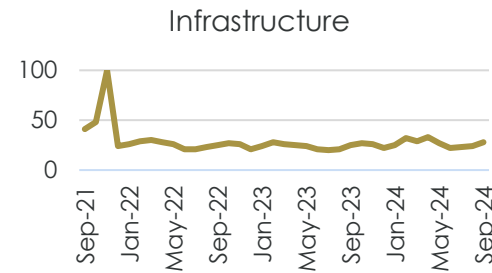
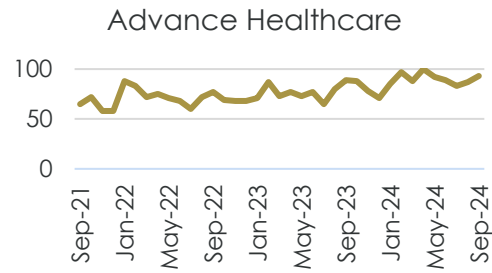
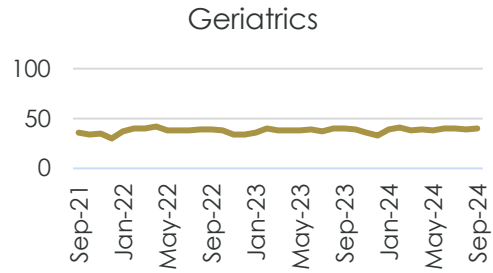
STOXX Thematic Indices

Correlations

	AP	AI	A&R	BH	BI	C&MM	CM	DE&E	DS	DIGI	EV&DT	ES&M	FIN	H&WL	HC	I4.0	IC	L&BP	LM&P	META	MIL	NGT	PC	SE	SILV	SILM	SC	SCI	SF	VG&E	NC	NM	NSD	LUX	US ETF	B.R. AI.N		
Ageing Population [AP]	1.0																																					
Artificial Intelligence [AI]	-0.5	1.0																																				
Automation & Robotics [A&R]	-0.3	0.7	1.0																																			
Breakthrough Healthcare [BH]	0.6	-0.1	0.2	1.0																																		
Broad Infrastructure [BI]	0.5	-0.7	-0.6	0.1	1.0																																	
Copper and Metals Mining [C&MM]	0.2	-0.1	-0.2	-0.1	0.2	1.0																																
Copper Miners [CM]	0.2	-0.1	-0.2	-0.1	0.2	1.0	1.0																															
Digital Entertainment and Education [DE&E]	-0.3	0.7	0.7	0.1	-0.6	-0.2	-0.2	1.0																														
Digital Security [DS]	-0.1	0.4	0.6	0.3	-0.4	-0.4	-0.4	0.5	1.0																													
Digitalisation [DIGI]	0.0	0.5	0.6	0.3	-0.4	-0.1	0.0	0.6	0.4	1.0																												
Electric Vehicles & Driving Technology [EV&DT]	-0.1	0.5	0.6	0.0	-0.5	0.1	0.2	0.5	0.1	0.4	1.0																											
Energy Storage and Materials [ES&M]	0.1	0.2	0.4	0.1	-0.1	0.3	0.4	0.2	0.0	0.4	0.7	1.0																										
Fintech [FIN]	0.2	0.1	0.4	0.3	-0.2	-0.2	-0.2	0.3	0.2	0.8	0.2	0.3	1.0																									
Health & Weight Loss [H&WL]	0.1	-0.1	0.1	0.3	0.1	0.3	0.3	0.0	-0.3	0.2	0.0	0.2	0.1	1.0																								
Housing Construction [HC]	-0.1	0.5	0.7	0.1	-0.3	0.2	0.2	0.4	0.0	0.4	0.7	0.5	0.2	0.0	1.0																							
Industry 4.0 [I4.0]	-0.4	0.8	0.9	0.1	-0.6	-0.3	-0.3	0.8	0.7	0.5	0.4	0.1	0.2	-0.2	0.4	1.0																						
Intelligent Computing [IC]	-0.1	0.6	0.8	0.2	-0.5	0.0	0.1	0.6	0.3	0.5	0.7	0.4	0.4	0.1	0.6	0.6	1.0																					
Lithium and Battery Producers [L&BP]	0.0	0.3	0.3	0.0	-0.1	0.3	0.3	0.2	0.1	0.2	0.6	0.7	0.1	0.0	0.4	0.2	0.4	1.0																				
Lithium Miners and Producers [LM&P]	0.1	0.2	0.2	0.0	-0.1	0.3	0.3	0.1	0.0	0.1	0.5	0.6	0.0	0.1	0.3	0.0	0.3	0.9	1.0																			
Metaverse [META]	-0.4	0.8	0.7	0.0	-0.6	-0.2	-0.1	0.8	0.4	0.6	0.4	0.1	0.4	-0.1	0.4	0.8	0.6	0.2	0.1	1.0																		
Millennials [MIL]	-0.3	0.7	0.5	0.0	-0.6	-0.1	0.0	0.7	0.2	0.8	0.4	0.3	0.5	0.2	0.3	0.5	0.3	0.2	0.1	0.7	1.0																	
Next Generation Telecoms [NGT]	-0.3	0.3	0.3	-0.1	0.0	-0.2	-0.2	0.4	0.2	0.0	0.1	-0.1	-0.2	-0.3	0.4	0.5	0.2	0.0	0.0	0.4	0.1	1.0																
Pet Care [PC]	0.5	-0.5	-0.3	0.4	0.4	0.0	0.0	-0.3	-0.2	-0.2	-0.2	-0.2	-0.1	0.4	-0.2	-0.4	-0.2	-0.1	0.0	-0.4	-0.3	-0.1	1.0															
Sharing Economy [SE]	0.0	0.4	0.4	0.1	-0.4	-0.1	-0.1	0.4	0.1	0.8	0.3	0.3	0.8	0.1	0.3	0.3	0.4	0.1	0.1	0.5	0.8	-0.1	-0.3	1.0														
Silver Economy [SILV]	0.0	0.4	0.4	0.2	-0.4	0.2	0.2	0.4	0.1	0.4	0.2	0.1	0.2	0.1	0.4	0.4	0.4	0.0	0.0	0.4	0.4	0.2	-0.1	0.4	1.0													
Silver Mining [SILM]	0.0	-0.1	-0.2	0.1	0.2	0.6	0.7	0.0	-0.3	0.0	0.0	0.3	-0.2	0.3	0.2	-0.2	-0.1	0.1	0.1	-0.1	0.1	-0.1	-0.1	-0.2	0.0	1.0												
Smart Cities [SC]	-0.2	0.7	0.7	0.2	-0.5	-0.1	-0.1	0.6	0.6	0.5	0.6	0.4	0.2	-0.1	0.4	0.7	0.6	0.5	0.5	0.6	0.4	0.1	-0.3	0.2	0.3	-0.1	1.0											
Smart City Infrastructure [SCI]	0.2	0.3	0.7	0.5	-0.2	0.0	0.0	0.3	0.4	0.4	0.5	0.3	0.4	0.1	0.7	0.4	0.5	0.3	0.3	0.3	0.2	0.0	0.1	0.3	0.4	0.1	0.5	1.0										
Smart Factory [SF]	-0.4	0.7	0.8	0.0	-0.5	0.0	0.1	0.7	0.3	0.4	0.7	0.4	0.1	-0.1	0.8	0.8	0.7	0.4	0.3	0.7	0.5	0.5	-0.3	0.3	0.5	0.0	0.6	0.5	1.0									
Video Gaming & eSports [VG&E]	-0.6	0.8	0.6	-0.2	-0.5	-0.2	-0.2	0.7	0.3	0.4	0.4	0.2	0.0	-0.1	0.4	0.7	0.5	0.3	0.1	0.8	0.6	0.4	-0.4	0.3	0.3	-0.1	0.5	0.1	0.7	1.0								
NexGen Connectivity [NC]	-0.5	0.6	0.6	-0.1	-0.3	-0.3	-0.2	0.6	0.4	0.2	0.2	-0.1	-0.1	-0.2	0.3	0.8	0.3	0.1	-0.1	0.6	0.3	0.9	-0.3	0.1	0.3	-0.2	0.4	0.0	0.6	0.6	1.0							
NexGen Media [NM]	-0.6	0.9	0.7	-0.2	-0.6	-0.2	-0.2	0.8	0.3	0.5	0.4	0.2	0.1	0.0	0.4	0.7	0.4	0.2	0.0	0.8	0.8	0.3	-0.4	0.4	0.3	-0.1	0.5	0.1	0.7	0.9	0.6	1.0						
NexGen Software Development [NSD]	-0.6	0.9	0.8	-0.1	-0.7	-0.2	-0.1	0.8	0.4	0.5	0.5	0.2	0.1	0.0	0.5	0.8	0.6	0.2	0.1	0.8	0.7	0.4	-0.4	0.4	0.4	-0.1	0.6	0.2	0.8	0.9	0.7	0.9	1.0					
Europe Luxury 10 [LUX]	-0.3	0.3	0.3	-0.1	-0.3	0.0	0.1	0.1	-0.2	0.2	0.3	0.3	0.1	0.5	0.3	0.1	0.2	0.2	0.2	0.1	0.4	-0.1	0.1	0.3	0.2	0.0	0.0	0.1	0.3	0.4	0.0	0.4	0.3	1.0				
USA ETF [US ETF]	0.3	0.0	0.3	0.4	-0.1	0.0	0.0	0.1	0.2	0.4	0.2	0.4	0.5	0.1	0.2	0.2	0.2	0.2	0.2	0.1	0.1	-0.2	0.1	0.1	0.0	0.0	0.3	0.3	0.1	-0.1	-0.2	0.0	-0.1	0.1	1.0			
B.R.AI.N [B.R.AI.N]	-0.2	0.3	0.4	0.3	-0.1	-0.2	-0.2	0.3	0.4	0.0	0.0	-0.1	-0.2	0.0	0.2	0.5	0.1	0.0	-0.1	0.3	0.1	0.4	0.0	-0.2	0.2	0.0	0.2	0.2	0.4	0.3	0.4	0.3	0.4	0.1	0.0	1.0		

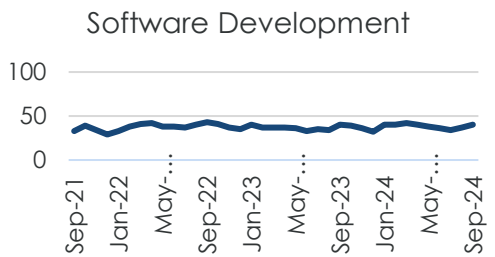
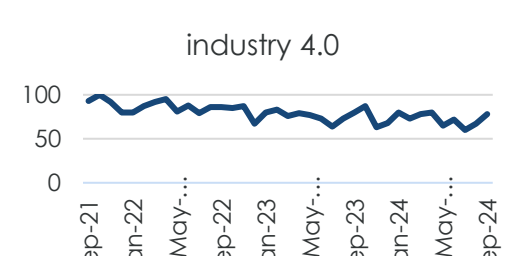
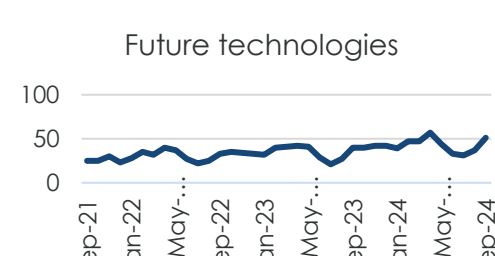
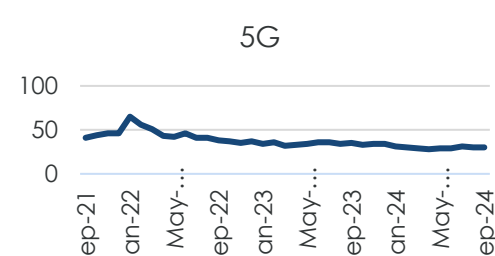
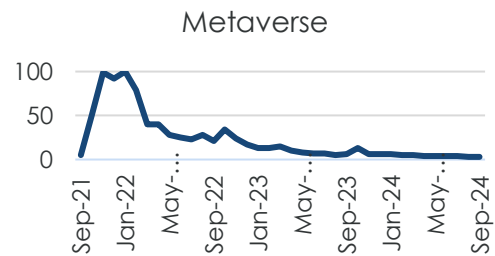
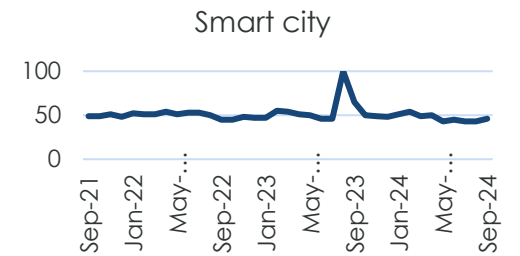
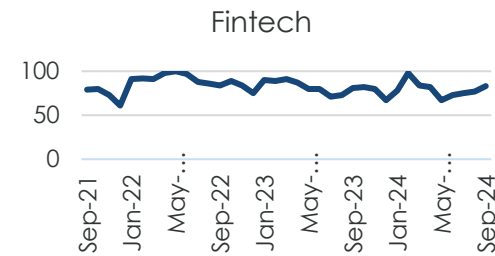
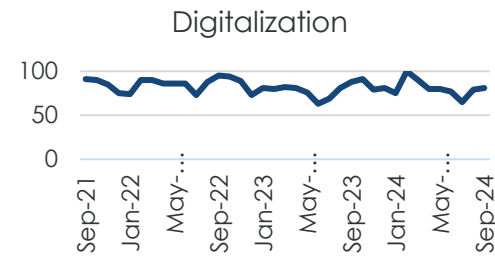
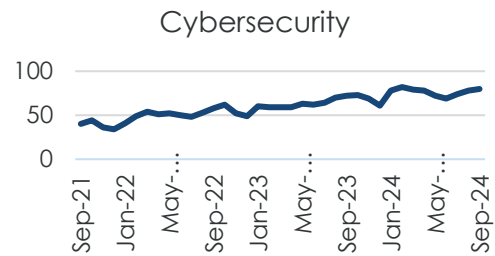
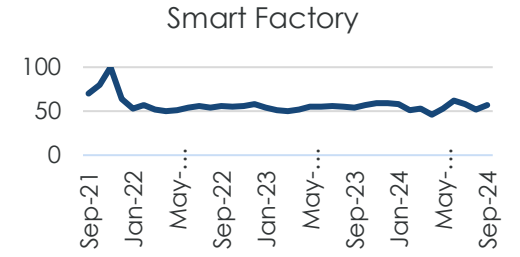
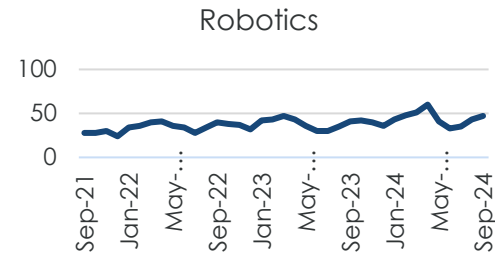
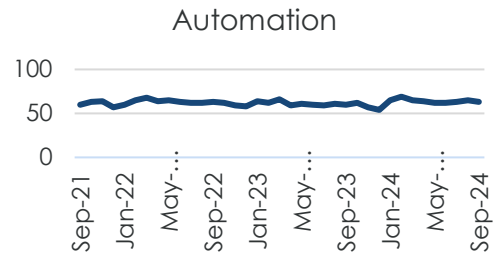
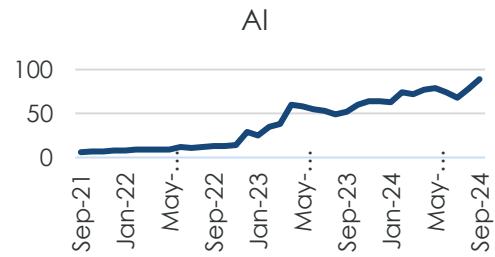
Source: STOXX, Monthly data Sep 29, 2023 to Sep 30, 2024, Excess Returns to STOXX World AC USD GR

Google Trends: Social Demographics



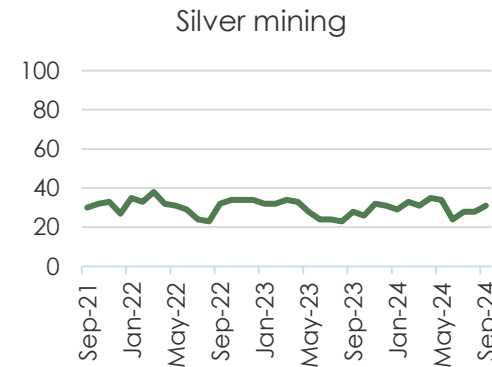
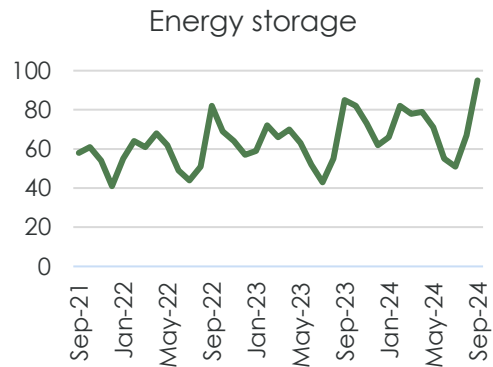
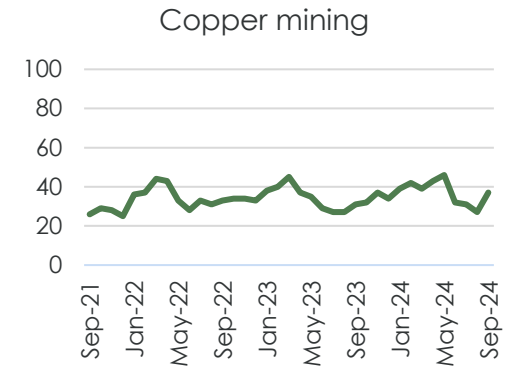
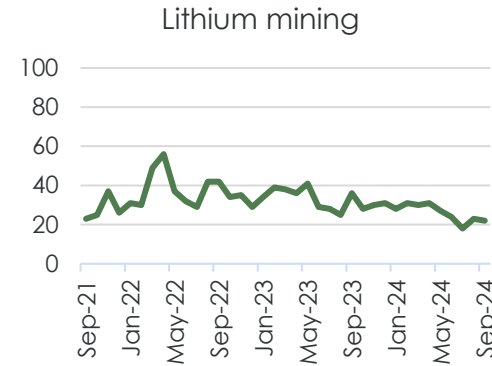
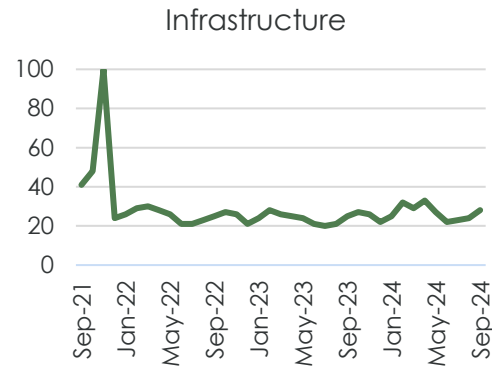
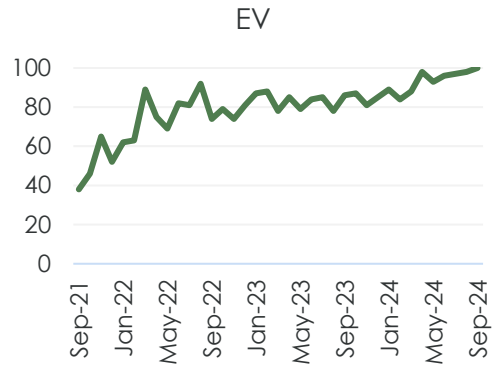
Source: Google trends, monthly data Sep 30, 2021 to Sep 30, 2024

Google Trends: Future of Technology



Source: Google trends, monthly data Sep 30, 2021 to Sep 30, 2024

Google Trends: Environmental



Source: Google trends, monthly data Sep 30, 2021 to Sep 30, 2024

STOXX Thematic Indices: Google Trend Keyword

Social Demographics

Index	Keyword
STOXX Global Ageing Population	Geriatrics
STOXX Global Breakthrough Healthcare	Advanced Healthcare
STOXX Global Broad Infrastructure	Infrastructure
STOXX Global Digital Entertainment and Education	Digital Media
STOXX Global Health & Weight Loss	Wellness
STOXX Global Housing Construction	Housing Construction
STOXX Global Millennials	Millennials
STOXX Global Pet Care	Pet Grooming
STOXX Global Sharing Economy	Gig Economy
STOXX Global Silver Economy	Geriatrics
STOXX Global Video Gaming & eSports	Video Gaming
STOXX World AC NexGen Media	Digital Media
STOXX Europe Luxury 10	Luxury Goods
STOXX USA ETF Industry	ETF

Environmental

Index	Keywords
STOXX Global Copper and Metals Mining	Copper mining
STOXX Global Copper Miners	Copper mining
STOXX Global Electric Vehicles & Driving Technology	EV
STOXX Global Energy Storage and Materials	Energy Storage
STOXX Global Lithium and Battery Producers	Lithium mining
STOXX Global Lithium Miners and Producers	Lithium mining
STOXX Global Smart City Infrastructure	Infrastructure
STOXX Global Silver Mining	Silver mining

Future of Technology

Index	Keywords
STOXX Global Artificial Intelligence	AI
STOXX Global Automation & Robotics	Automation, Robotics
STOXX Global Digital Security	Cybersecurity
STOXX Global Digitalisation	Digitalization
STOXX Global Fintech	Fintech
STOXX Global Industry 4.0	Industry 4.0
STOXX Global Intelligent Computing	AI
STOXX Global Intelligent Computing ADTV5	AI
STOXX Global Metaverse	Metaverse
STOXX Global Next Generation Telecoms	5G
STOXX Global Smart Cities	Smart city
STOXX Global Smart Factory	Smart Factory
STOXX World AC NexGen Connectivity	5G
STOXX World AC NexGen Software Development	Software Development
iSTOXX Developed Markets B.R.AI.N	Future Technologies

Themes Overview

	1Y Excess Return	1Y Volatility	1Y Dividend yield	1Y Beta	Google Trend
STOXX Global Copper and Metals Mining	5.9%	27.4%	3.2%	1.42	-0.02
STOXX Global Copper Miners	2.8%	27.6%	3.5%	1.42	-0.02
STOXX Global Electric Vehicles & Driving Technology	-22.9%	18.9%	2.1%	1.50	1.42
STOXX Global Energy Storage and Materials	-27.5%	18.3%	1.9%	1.18	-0.64
STOXX Global Lithium and Battery Producers	-45.5%	19.6%	2.0%	1.48	-0.99
STOXX Global Lithium Miners and Producers	-70.4%	33.8%	0.6%	1.61	-0.99
STOXX Global Silver Mining	27.3%	36.3%	1.8%	1.60	0.02
STOXX Global Smart City Infrastructure	-3.4%	14.4%	1.9%	1.18	-0.02
STOXX Global Ageing Population	-6.0%	12.5%	2.5%	0.93	0.18
STOXX Global Breakthrough Healthcare	-12.5%	15.0%	0.9%	0.97	0.60
STOXX Global Broad Infrastructure	-5.7%	10.0%	4.4%	0.59	-0.02
STOXX Global Digital Entertainment and Education	12.9%	17.0%	1.1%	1.36	-0.19
STOXX Global Health & Weight Loss	-11.3%	14.6%	1.4%	0.94	0.40
STOXX Global Housing Construction	-0.5%	19.0%	2.1%	1.52	-0.12
STOXX Global Millennials	10.3%	14.8%	0.8%	1.19	-0.28
STOXX Global Pet Care	-12.4%	11.3%	2.3%	0.58	0.31
STOXX Global Sharing Economy	11.0%	16.0%	0.6%	1.29	-0.14
STOXX Global Silver Economy	-4.1%	13.8%	1.5%	1.16	0.18
STOXX Global Video Gaming & eSports	8.0%	17.4%	1.2%	1.42	-0.76
STOXX World AC NexGen Media	19.4%	18.4%	1.0%	1.47	-0.19
STOXX Europe Luxury 10	-12.7%	22.9%	2.1%	1.04	-1.24
STOXX USA ETF Industry	0.0%	13.6%	2.7%	0.88	0.81
STOXX Global Artificial Intelligence	9.6%	21.9%	1.0%	1.73	2.16
STOXX Global Automation & Robotics	-8.6%	17.7%	1.0%	1.50	0.38
STOXX Global Digital Security	-5.0%	15.9%	1.1%	1.21	0.55
STOXX Global Digitalisation	2.6%	14.9%	1.0%	1.25	-0.99
STOXX Global Fintech	1.0%	14.0%	1.3%	1.11	-0.29
STOXX Global Industry 4.0	4.1%	18.4%	1.8%	1.49	-0.74
STOXX Global Intelligent Computing	-9.5%	18.2%	1.5%	1.45	2.16
STOXX Global Metaverse	10.3%	18.5%	1.1%	1.52	-0.48
STOXX Global Next Generation Telecoms	-2.3%	14.2%	3.1%	1.17	-0.43
STOXX Global Smart Cities	-8.9%	24.1%	0.6%	1.85	-1.11
STOXX Global Smart Factory	-4.8%	23.0%	1.5%	1.77	-0.09
STOXX World AC NexGen Connectivity	3.6%	15.1%	2.6%	1.24	-0.43
STOXX World AC NexGen Software Development	9.0%	22.4%	0.7%	1.76	-0.05
iSTOXX Developed Markets B.R.AI.N	-17.5%	14.5%	1.5%	1.14	0.00

Source: STOXX, daily data Sep 29, 2023 to Sep 30, 2024, USD GR

*vs STOXX World AC

**Google trend, is calculated as the slope of the 1-year trend scores (monthly Sep 30, 2021 to Sep 30, 2024)

Thank you!



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