

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q1 2021. 56 STOCKS.

Each stock freely floats according to its share price after rebalance.

*Stocks below \$200 million in size at rebalance are *banded with a 0.50% weight.

Renewable Energy Harvesting - 22% weight (10 stocks @2.10% each +2 *banded)

Array Technologies, ARRY. Solar, tracker mounts follow sun through the day

Azure Power Global, AZRE. Solar, India; aims for very low-cost green energy.

**Broadwind*, BWEN. Wind, steel towers, gearing fabrication, and solar arrays.

Canadian Solar, CSIQ. Solar, vertically integrated solar manufacturer, China.

Daqo New Energy, DQ. Solar, polysilicon/wafer manufacturer; China-based.

First Solar, FSLR. Thin film solar, CdTe a low-cost alternate to polysilicon.

JinkoSolar, JKS. Solar, wafers through solar modules, China-based OEM.

Maxeon, MAXN. Solar, efficient PV panels after spinoff from Sunpower.

Ormat, ORA. Geothermal, also in areas of recovering heat energy.

Reesol, SOL. Solar, project development and operations, China & globally.

**SPI Energy*, SPI. Solar and EVs, develops solar projects, subsidiary is in EVs.

TPI Composites, TPIC. Wind Blades; also light-weighting for transportation.

Energy Conversion - 19% sector weight (11 stocks @1.72% each)

Advanced Energy, AEIS. Power conditioning: inverters, thin film deposition.

Ballard Power, BLDP. Mid-size fuel cells; PEM FCs as in transportation.

Bloom Energy, BE. Stationary fuel cells, not-yet cleanest/renewable fuels.

Cree, CREE. Power electronics, electrifying EV power, SiC, converters.

Enphase, ENPH. Microinverters, also energy storage systems and software.

ESCO Technologies, ESE. Power management, shielding, controls, testing.

FuelCell Energy, FCEL. Stationary fuel cells, distributed power generation.

Gentherm, THRM. Thermoelectrics, heat energy, battery management.

Plug Power, PLUG. Small fuel cells, for eg forklifts; drop in replacements.

SolarEdge Technologies, SEDG. Inverters, solar optimizers, inverters.

Woodward, WWD. Converters, controls for wind power, energy storage.

Power Delivery & Conservation - 23% sector (12 stocks @1.87% each + 1 *banded)

Ameresco, AMRC. Energy saving efficiencies, net zero CO₂, decarbonization.

American Superconductor, AMSC. Wind, grid conditioning; superconductors.

Arcimoto, FUV. EVs, smaller very low-cost 3 wheeled electric vehicles.

**Ayro*, AYRO. EVs, compact fleet vehicles university & corporate campuses.

Blink Charging, BLNK. EV Charging, among bigger EV charging networks in U.S.

Electrameccanica Vehicles, SOLO. EVs, 3 wheeled and custom electric vehicles.

Fisker, FSR. EV crossover SUV, is assembled by contract manufacturer.

Infrastructure and Energy, IEA. Renewables, power generation to delivery.

Itron, ITRI. Meters, utility energy monitoring, measurement & management.

MYR Group, MYRG. Grid transmission and distribution, for solar & wind farms.

Quanta Services, PWR. Infrastructure, modernizing grid & power transmission.

Universal Display, OLED. Organic light emitting diodes, efficient displays.

Willdan, WLDN. Efficiency, in distributed energy, renewables, engineering.

Greener Utilities - 7% sector weight (4 stocks @1.75% each)

Beam, BEEM. EV Charging, rapidly deployable portable PV powered utility.

Sunnova, NOVA. Solar provider, operating fleet for residential, plus storage.

SunPower, SPWR. Solar system provider, storage and distributed generation.

Sunrun, RUN. Residential solar systems, lease, PPA or purchase rooftop PV.

Energy Storage - 26% sector weight (13 stocks @1.96% each +1 *banded)

Albermarle, ALB. Lithium, specialty materials in batteries for energy storage.

Chemical & Mining of Chile, SQM. Lithium, large producer for energy storage.

Eos, EOSE. Zinc grid batteries, 100% depth discharge, longer-life, is not li-ion.

**Flux Power*, FLUX. Batteries, lithium-ion packs for fork lifts, stackers.

GreenPower Motor, GP. Large EV, electric transit buses, transit, school buses.

Kandi, KNDI. EVs, inexpensive small cars early-stage, battery swapping, China.

Lithium Americas, LAC. Lithium, deposits in State of Nevada U.S. & Argentina.

Livent, LTHM. Lithium, and compounds used in batteries for energy storage.

Lordstown Motors, RIDE. Electric commercial pickup trucks, American startup.

NIO Inc, NIO. EVs, China-based startup premium vehicles but loss-making so far.

Quantumscape, QS. Battery, solid state lithium-metal energy dense fast charge.

Tesla, TSLA. Electric vehicles, pure-play across advanced EVs, energy storage.

Workhorse, WKHS. Electric Vehicles, large electric delivery trucks, early-stage.

Xpeng, XPEV. Electric vehicles, advanced mobility and transport technologies.

Cleaner Fuels - 3% sector weight (2 stocks @1.50% each)

Air Products & Chemicals, APD. Hydrogen, projects for green hydrogen (H₂).

Renewable Energy Group, REGI. Biodiesel, natural fats, grease to biofuels.