

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q2 2021. 66 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 - 19% weight (10 stocks @1.80% 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 Storage - 25% sector weight (15 stocks @1.63% 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 exchange, 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, battery as a service.

Piedmont Lithium, PLL. Lithium, US domestic source battery-grade lithium.

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

Romeo, RMO. Battery packs, designs & builds energy systems, snap in uses.

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

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

Xpeng, XPEV. Electric vehicles, advanced mobility, swappable batteries, China.

Power Delivery & Conservation - 23% sector (16 stocks @1.43% each)

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.

Canoo, GOEV. Electric delivery vehicles, configurable and multipurpose.

Chargepoint, CHPT. EV Charging, global including for fleets and businesses.

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.

Shoals, SHLS. Solar, electrical balance of system (EBOS), wiring, combiners.
Universal Display, OLED. Organic light emitting diodes, efficient displays.
Willdan, WLDN. Efficiency, in distributed energy, renewables, engineering.

Energy Conversion - 19% sector weight (13 stocks @1.46% each)

Advanced Energy, AEIS. Power conditioning: inverters, thin film deposition.
Advent, ADN. Fuel cells, high temperature so fuel-flexible for diverse uses.
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.
MP Materials, MP. Rare Earths, US domestic source of Neodymium, NdPr etc.
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.

Greener Utilities - 8% sector weight (5 stocks @1.60% 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.
Sunworks, SUNW. Solar provider, a 1-stop for commercial and residential.

Cleaner Fuels - 6% sector weight (4 stocks @1.50% each)

Aemetis, AMTX. Biofuels, renewable jet fuels, hydrogen, low-carbon diesel.
Air Products & Chemicals, APD. Hydrogen, projects for green hydrogen (H₂).
Gevo, GEVO. Biofuels, lower carbon liquid fuels from renewable sources.
Renewable Energy Group, REGI. Biodiesel, natural fats, grease to biofuels.