INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q3 2014. 57 STOCKS.
Each stock freely floats according to its share price after rebalance.
*Stocks below $200 million in size at rebalance are *banded with a 0.5% weight.

<u>Renewable Energy Harvesting</u> - 27% sector weight (12 stocks @2.20 each; +1 banded)
**Broadwind Energy,* BWEN. Wind power, producer of towers, gearing, services.
Canadian Solar, CSIQ. Solar, vertically integrated solar manufacturer, China.
China Ming Yang Wind, MY. Wind, large turbine manufacturer is a pure play.
Cytec, CYT. Carbon fiber, used in tidal energy; in wind; vehicle lightening.
Daqo New Energy, DQ. Solar, polysilicon/wafer manufacturer; China-based.
First Solar, FSLR. Thin film, CdTe solar as low-cost alternate to polysilicon.
Gentherm, THRM. Thermoelectrics, waste heat to energy, power harvesting.
Hanwha SolarOne, HSOL. Solar PV, integrated from poly through modules.
JA Solar, JASO. Solar, China-based sells PV modules in Asia, Europe, U.S.
Ormat, ORA. Geothermal, working too in areas of recovered heat energy.
SunPower, SPWR. Solar, efficient PV panels have all-rear-contact cells.
Trina Solar, TSL. Solar, produces ingots, wafers, modules; China-based.
Yingli Green Energy, YGE. Solar, large vertically integrated manufacturer.

<u>Power Delivery & Conservation</u> - 20% sector weight (8 stocks @2.25%; +4 *banded)
Aixtron Aktiengesellschaft, AIXG. Deposition tools, efficient O/LED, displays.
Ameresco, AMRC. Energy saving performance contracts, also in renewables.
**Amtech Systems,* ASYS. Solar wafer equipment, U.S. based turnkey supplier.
**Echelon,* ELON. Networking, better management of whole energy systems.
EnerNoc, ENOC. Demand response for better energy management, smart grid.
GT Advanced, GTAT. Solar, LEDs, production lines, poly, ingot; LED sapphire.
Itron, ITRI. Meters, utility energy monitoring, measurement & management.
**Orion Energy Systems*, OESX. Efficiency, LED light retrofits, energy services.
**PowerSecure,* POWR. Smart grid, demand response, distributed generation.
Quanta Services, PWR. Infrastructure, modernizing grid & power transmission.
ReneSola, SOL. Wafers, for silicon PV, mono & multicrystalline, China-based.
SunEdison, SUNE. Producer of polysilicon used in crystalline c-Si solar PV cells.

<u>Energy Conversion</u> - 19% sector weight (9 stocks @2.00% each; +2 *banded stocks)
Advanced Energy, AEIS. Power conditioning: inverters, thin film deposition.
**American Superconductor,* AMSC. Wind power converters; superconducting.
Ballard Power, BLDP. Mid-size fuel cells; R&D, PEM FCs as in transportation.
Cree, CREE. LEDs, manufacturer in power-saving lumens, efficient lighting.
Enphase, ENPH. Microinverters, PV panel DC becomes grid compliant AC.
FuelCell Energy, FCEL. Large fuel cells, stationary high-temp flex-fuel MCFCs.
International Rectifier, IRF. Energy-saving, power conversion & conditioning.
Plug Power, PLUG. Small fuel cells, PEM for forklifts; drop in replacements.
Rubicon, RBCN. Substrates, are used in the production of LEDs for lighting.
Universal Display, OLED. Organic light emitting diodes, efficient displays.
**UQM Technologies,* UQM. Motors, controller systems for EVs, & hybrids.

<u>Energy Storage</u> - 12% sector weight (6 stocks @1.91% each; +1 *banded stock)
Fuel Systems Solutions, FSYS. Gaseous fuels; in cleaner-but-still ICE vehicles.
Maxwell, MXWL. Ultracapacitors, an alternative assisting batteries, in hybrids.
OM Group, OMG. Battery materials from cobalt; also magnetics, cell etching.

Polypore Intl., PPO. Separators, membranes used in Li-ion, other battery cells.
**Rare Element Resources,* REE. Rare Earths, holdings for strategic lanthanides.
Sociedad de Chile, SQM. Lithium, major Li supplier in batteries; energy storage.
Tesla Motors, TSLA. Electric vehicles, pure-play in EVs and energy storage.

<u>Cleaner Fuels</u> - 10% sector weight (4 stocks @2.12% each; +3 *banded stocks)
Air Products & Chemicals, APD. Hydrogen, is a supplier of industrial gases.
Amyris, AMRS. Biotech, speculative R&D in renewable fuels for transportation.
**Gevo,* GEVO. Biotech, speculative R&D drop-in isobutanol, renewable biofuels.
**Hydrogenics,* HYGS. Hydrogen, electrolysis generation & fuel cells, H2 storage.
*Quantum Fuel Systems, QTWW. Compressed gas, in alternative fuel vehicles.
Renewable Energy Group, REGI. Biodiesel, natural fats, oils, greases to biofuels.
Solazyme, SZYM. Biofuels, microalgae grown w/o sun, drop-in diesel substitute.

<u>Greener Utilities</u> – 12% sector weight (6 stocks @1.91% each; +1 *banded stock)
Calpine, CPN. Geothermal, major North American producer, low-carbon assets.
Pattern Energy, PEGI. Wind farms, solar is being added in GW+ sized PPAs.
ITC Holdings, ITC. Grid transmission, better integration for wind/renewables.
Opower, OPWR. Utility software, cloud based is for reducing energy demand.
**RGS Energy*, RGSE. Downstream PV, solar for homes, business, governments.
Silver Spring Networks, SSNI. Smart grid, two-way communications aids Utilities.
SolarCity, SCTY. Downstream PV leases, can provide solar with no-upfront cost.