

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q3 2018. 39 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.

Renewable Energy Harvesting - 29% weight (9 stocks @3.22% each)

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.

Hanwha Q Cells, HQCL. Solar, integrated from poly through modules.

Hexcel, HXL. Light composites, in wind blades & spars, aerospace, vehicles.

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

Ormat, ORA. Geothermal, works too in areas of recovered heat energy.

SunPower, SPWR. Solar, efficient PV panels have all-rear-contact cells.

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

Power Delivery & Conservation - 15% sector weight (5 stocks @2.90%; +1 *banded)

Ameresco, AMRC. Energy saving performance contracts, also in renewables.

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

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

MYR Group, MYRG. Transmission and Distribution, includes solar & wind farms.

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

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

Energy Conversion - 23% sector weight (7 stocks @3.07% each; +3 *banded)

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

**Amtech*, ASYS. Equipment Manufacturer, solar, LEDs lights, semiconductors.

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

Cree, CREE. LEDs, manufacturer in power-saving lumens, efficient lighting.

**FuelCell Energy*, FCEL. Large fuel cells, high-operating temps, multiple-fuels.

Gentherm, THRM. Thermoelectrics, waste heat to energy, power harvesting.

**LSI Industries*, LYTS. Lighting, LEDs, is vertically integrated U.S. manufacturer.

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

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

Veeco, VECO. Thin film equipment, for LEDs, energy efficient electronics.

Greener Utilities - 12% sector weight (4 stocks @2.87% each; +1 *banded stock)

Atlantica Yield, AY. Yieldco, Contracted renewables assets, also transmission.

Pattern Energy, PEGI. Wind farms, solar may be added too for GW sized PPAs.

**Sky Solar*, SKYS. Solar farms, creating & operating utility-scale projects.

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

TerraForm Power, TERP. Owns operates solar/wind, developed nations, yieldco.

Energy Storage - 15% sector weight (5 stocks @2.90% each; + 1 banded stock)

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

**Aqua Metals*, AQMS. Recycling lead acid batteries, eliminating toxic wastes.

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

Maxwell, MXWL. Ultracapacitors, an alternative to batteries as in hybrids.

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

Tesla Motors, TSLA. Electric vehicles, solar; purer-play in EVs & energy storage.

Cleaner Fuels - 6% sector weight (2 stocks @2.75% each; +1 *banded stock)

Air Products & Chemicals, APD. Hydrogen, is a supplier of industrial gases.

**Hydrogenics*, HYG. Hydrogen, fuel and electrolysis for fuel cells, H₂ storage.

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