

## INDEX (ECO) SECTORS & STOCK WEIGHTINGS AS OF FIRST DAY OF Q3 2007. 42 STOCKS.

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

\* Stocks \$50-\$200 million in size at the rebalance are banded at a 0.5% weight.

### **Renewable Energy Harvesting** - 36% sector weight (12 stocks @3.0% each)

*Applied Materials*, AMAT. Solar PV fabrication, growing both thin film and crystalline.

*Emcore*, EMKR. Solar, ultra-efficient PV cells for satellites, and terrestrial use.

*Evergreen* ESLR. Unique string-ribbon solar PV with more efficient silicon-use.

*First Solar*, FSLR. Maker of thin film, CdTe solar panels that reduce silicon need.

*JA Solar*, JASO. Solar, China-based selling PV modules in Asia, Europe, U.S. etc.

*MEMC*, WFR. Producer of the polysilicon needed in many crystalline solar PV cells.

*Ormat*, ORA. Geothermal, works as well in recovered energy from waste heat.

*SunPower*, SPWR. Solar, Efficient PV panels with all-rear-contacts cells.

*SunTech Power*, STP. Solar, fast-growing major producer of PV, based in China.

*Trina Solar*, TSL. Solar, produces ingots, wafers, solar PV modules; China-based.

*Yingli Green Energy*, YGE. Vertically-integrated solar PV manufacturer, China.

*Zoltek*, ZOLT. Wind, makes carbon fiber for wind blades and product 'lightening'.

### **Power Delivery & Conservation** - 21% sector weight (7 stocks @2.93% each; +1 banded stock)

*American Superconductor*, AMSC. Superconductors 2G HTS; also in wind power.

*Comverge*, COMV. Demand-side energy management for smarter grids.

*Cree*, CREE. LEDs, makes efficient lights, power-saving electronics.

*Echelon*, ELON. Networking for the management of whole energy systems.

*International Rectifier*, IRF. Efficiency-enabling electronics producer.

*Itron*, ITRI. Monitoring, designs energy measurement and management systems.

*Universal Display*, PANL. Organic light emitting diode OLED panel displays.

\**UQM Technologies*, UQM. Hybrid vehicle electrics; motor & power systems.

### **Cleaner Fuels** - 15% sector weight (7 stocks @2.14% each)

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

*MGP*, MGPI. Biofuels, ethanol and fuel alcohol.

*Nova Biosource Fuels*, NBF. Biodiesel, refining and marketing renewable fuels.

*Pacific Ethanol*, PEIX. Aims to be a leading biofuels producer in Western U.S.

*Praxair*, PX. Hydrogen, a supplier of many industrial gases.

*VeraSun Energy*, VSE. Biofuels, one of the largest corn ethanol producers in U.S.

*Verenium*, VRNM (was DVSA). Enzymes to convert biomass, cellulosic feedstocks.

### **Energy Storage** - 12% sector weight (4 stocks @2.62% each; +3 banded stocks)

\**Active Power*, ACPW. Flywheel power storage, a firm power alternative to batteries.

\**China BAK Battery*, CBAK. China-based OEM manufacturer of lithium-based cells.

*Energy Conversion Devices*, ENER. Very diversified: in batteries, solar PV, also FCs.

*Fuel Systems Solutions*, FSYS. Gaseous fuels integrator for cleaner-fueled vehicles.  
*Maxwell*, MXWL. Ultracapacitors, battery alternative such as for hybrid vehicles.  
*OM Group*, OMG. Produces cobalt & precursors to Li-Ion rechargeable batteries, FCs.  
*\*Ultralife Batteries*, ULBI. Batteries, advanced lithium ion, polymer rechargeable.

**Energy Conversion - 10% sector weight (5 stocks @2.0% each)**

*Amerigon*, ARGN. Thermoelectrics, subsidiary is in conversion of waste heat to power.  
*Ballard Power*, BLDP. Mid-size fuel cells R&D, PEM FCs such as for transportation.  
*FuelCell Energy*, FCEL. Large fuel cells are stationary high-temp. flex-fuel MFCs.  
*Medis*, MDTL. Micro fuel cells designed for liquid-fuels with unique electrolyte.  
*Plug Power*, PLUG. Mid-sized fuel cells for distributed generation, home power.

**Greener Utilities - 6% sector weight (3 stocks @2.0% each)**

*Idacorp*, IDA. Hydroelectric, Utility, significant hydroelectric with some small hydro.  
*Portland General Electric*, POR. Utility in hydro & thermal but growing renewables.  
*Puget Energy*, PSD. Wind, Utility, PSD is growing its wind power base.