INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q2 2012. 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 0.5% weight.

<u>Renewable Energy Harvesting</u> - 23% sector weight (10 stocks @2.15 each; +3 banded)
**Canadian Solar,* CSIQ. Solar, vertically integrated solar PV manufacturer, China.
China Ming Yang Wind, MY. Wind, large turbine manufacturer is a pure play.
**Daqo New Energy,* DQ. Polysilicon, expanding downstream to making modules.
First Solar, FSLR. Thin film, CdTe solar panels reducing silicon need and cost.
**Hanwha SolarOne,* HSOL. Solar PV, integrated from poly through modules.
JA Solar, JASO. Solar, China-based sells PV modules in Asia, Europe, U.S., etc.
Kaydon, KDN. Wind, Manufactures friction & velocity controls in wind turbines.
Ormat, ORA. Geothermal, working too in areas of recovered heat energy.
SunPower, SPWR. Solar, efficient PV panels have all-rear-contact cells.
SunTech Power, STP. Solar, major producer of global PV based in China.
Trina Solar, TSL. Solar, produces ingots, wafers, solar modules; China-based.
Yingli Green Energy, YGE. Solar, is vertically integrated PV manufacturer.
Zoltek, ZOLT. Wind, makes carbon fiber for wind blades, product lightening.

<u>Power Delivery & Conservation</u> - 21% sector weight (9 stocks @2.05% each; +5 banded)
Aixtron Aktiengesellschaft, AIXG. Deposition tools, efficient (O)LEDs, displays.
Ameresco, AMRC. Energy saving performance contracts, also in renewables.
**Amtech Systems,* ASYS. Solar, produces equipment to manufacture solar cells.
**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 for poly & ingot; LED sapphire.
ITC Holdings, ITC. Power Delivery, grid transmission integrates wind/renewables.
Itron, ITRI. Monitoring, advanced energy metering, measurement, management.
**Lime Energy,* LIME. Efficiency, energy-savings expertise in demand reduction.
MEMC, WFR. Producer of polysilicon used in many crystalline c-Si solar PV cells.
**PowerSecure,* POWR. Smart grid, demand response, distributed generation; LEDs.
Quanta Services, PWR. Infrastructure, modernizing grid and power transmission.
ReneSola, SOL. Wafers, for silicon PV, mono and multicrystalline, China-based.
**STR Holdings*, STRI. Encapsulants, broad technology for range of PV panels.

<u>Energy Storage</u> - 10% sector weight (5 stocks @2.00% each)
A123 Systems, AONE. Batteries, nanophosphate for EVs, the grid, portable power.
Maxwell, MXWL. Ultracapacitors, alternative supplement for batteries, hybrids, UPS.
OM Group, OMG. Cobalt and other precursors, producer for Li-Ion batteries, FCs.
Polypore Intl., PPO. Separators, membranes used in Li-ion, Pb-acid battery cells.
Sociedad de Chile, SQM. Lithium, major Li supplier for batteries; also STEG storage.

<u>Energy Conversion</u> - 27% sector weight (12 stocks @2.12% each; +3 banded stocks)
American Superconductor, AMSC. Wind power converters; superconducting HTS.
Amerigon, ARGN. Thermoelectrics, waste heat to power energy conversion.
**Ballard Power,* BLDP. Mid-size fuel cell R&D, FCs potential in transportation.
Cree, CREE. LEDs, manufacturer in power-saving lumens, efficient lighting.
FuelCell Energy, FCEL. Large fuel cells, stationary high-temp flex-fueled MCFCs.
Fuel Systems Solutions, FSYS. Gaseous fuels, ICEs in cleaner-fueled vehicles.
International Rectifier, IRF. Energy-saving, power conversion and conditioning.

Molycorp, MCP. Rare Earths, strategic elements in NdFeB magnets, wind power.
Power-One, PWER. Power conditioning, inverters & converters for renewables.
Rare Element Resources, REE. Rare Earths, holdings for strategic lanthanides.
Rubicon, RBCN. Substrates, are used in the production of LEDs for lighting.
**SemiLEDS,* LEDS. Higher brightness LED chips, Taiwan-based manufacturer.
Tesla Motors, TSLA. Electric vehicles, new pure-play in EVs, power systems.
Universal Display, PANL. Organic light emitting diodes, OLED panel displays.
**UQM Technologies,* UQM. Motors, control systems for EVs & hybrid vehicles.

Cleaner Fuels - 13% sector weight (6 stocks @2.16% each)
Air Products & Chemicals, APD. Hydrogen, is a supplier of industrial gases.
Amyris, AMRS. Biotech, speculative R&D for drop-in renewable diesel, jet fuels.
Cosan, CZZ. Biofuels, Brazil-based uses sugarcane feedstock, ethanol exporter.
Gevo, GEVO. Biotech, speculative R&D drop-in isobutanol, renewable biofuels.
Kior, KIOR. Biofuels, catalytic process: cellulosic biomass/non-food feedstocks.
Solazyme, SZYM. Biofuels, microalgae grown w/o sun, drop-in diesel substitute.

Greener Utilities – 6% sector weight (3 stocks @2.00% each)
Calpine, CPN. Geothermal, major North American producer, low-carbon assets.
CPFL Energia S.A, CPL. Hydroelectric, Brazil Utility has larger, smaller hydro.
Idacorp, IDA. Hydroelectric, Utility has sizeable hydroelectric, some small hydro.