

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q3 2012. 53 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 - 23% sector weight (9 stocks @2.38 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.

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.

Power Delivery & Conservation - 20% sector weight (7 stocks @2.42% each; +6 banded)

Aixtron Aktiengesellschaft, AIXG. Deposition tools, efficient (O)LEDs, displays.

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

**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.

Energy Storage - 10% sector weight (4 stocks @2.37% each; +1 *banded stock)

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.

Energy Conversion - 27% sector weight (11 stocks @2.31% each; +3 *banded stocks)

American Superconductor, AMSC. Wind power converters; superconducting HTS.

**Ballard Power*, BLPD. 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 MFCs.

Fuel Systems Solutions, FSYS. Gaseous fuels, ICEs in cleaner-fueled vehicles.

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

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*, LEES. 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.

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 - 7% sector weight (3 stocks @2.33% 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.