

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q3 2013. 51 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 - 25% sector weight (9 stocks @2.55 each; +4 *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 low-cost alternate to polysilicon.

**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.

**ReneSola*, SOL. Wafers, for silicon PV, mono and multicrystalline, China-based.

**STR Holdings*, STRI. Encapsulants, broad technology for range of PV panels.

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

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

Yingli Green Energy, YGE. Solar, is a vertically integrated PV manufacturer.

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

Power Delivery & Conservation - 21% sector weight (9 stocks @2.27% each; +1 *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.

PowerSecure, POWR. Smart grid, demand response, distributed generation; LEDs.

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

SunEdison, SUNE. Producer of polysilicon used in crystalline c-Si solar PV cells.

Energy Conversion - 19% sector weight (8 stocks @2.25% each; +2 *banded stocks)

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

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

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-fueled MFCs.

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.

**Rubicon*, RBCN. Substrates, are used in the production of LEDs for lighting.

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

Cleaner Fuels - 11% sector weight (5 stocks @2.10% each; +1 *banded stock)

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

Amyris, AMRS. Biotech, speculative R&D in renewable fuels for transportation.

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.

Energy Storage - 13% sector weight (5 stocks @2.40% each; +2 *banded stocks)

Fuel Systems Solutions, FSYS. Gaseous fuels; systems for cleaner-burning vehicles.

**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.

**Rare Element Resources*, REE. Rare Earths, holdings for strategic lanthanides.

Sociedad de Chile, SQM. Lithium, major Li supplier for batteries; also STEG storage.

Tesla Motors, TSLA. Electric vehicles, a pure-play in EVs and ESS energy storage.

Greener Utilities - 11% sector weight (5 stocks @2.20% 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 with sizeable hydroelectric, some small hydro.

Silver Spring Networks, SSNI. Smart grid; two-way communications aids Utilities.

SolarCity, SCTY. Power purchase agreements, solar rooftop DG energy systems.