

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q3 2022. 81 STOCKS.

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

*Stocks below \$200 million in size at rebalance are *banded with a 0.50% weight.

Renewable Energy Harvesting - 15% weight (12 stocks @1.25% each)

Array Technologies, ARRY. Solar, tracker mounts follow sun through the day
Azure Power Global, AZRE. Solar, India; aims for very low-cost green energy.
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.
FTC Solar, FTCL. Solar panel trackers mounting systems, Utility-scale.
JinkoSolar, JKS. Solar, wafers through solar modules, China-based OEM.
Maxeon, MAXN. Solar, efficient PV panel manufacturer after spinoff.
Ormat, ORA. Geothermal, also in areas of recovering heat energy.
Renesola, SOL. Solar, project development, operations, China & globally.
Sunlight Financial, SUNL. Solar residential financing, credit provider.
TPI Composites, TPIC. Wind Blades; also light-weighting transportation.

Energy Storage - 26% sector weight (20 stocks @1.27 each + 1 *banded)

Albermarle, ALB. Lithium, specialty materials in batteries for energy storage.
Chemical & Mining of Chile, SQM. Lithium, large producer in energy storage.
Enovix, ENVX. Silicon-anodes, 3D for improving new lithium-ion batteries.
**Eos*, EOSE. Zinc grid batteries, 100% depth discharge, longer-life not li-ion.
ESS Tech, GWH. Iron flow batteries, longer duration is non-lithium storage.
Fluence, FLNC. Battery storage, for renewables and digital applications.
Lion Electric, LEV. Urban electric trucks, buses, vans; vehicle to grid storage.
Lithium Americas, LAC. Lithium, deposits in State of Nevada U.S. & Argentina.
Livent, LTHM. Lithium, and compounds used in batteries for energy storage.
Lordstown Motors, RIDE. Electric commercial pickup trucks, American startup.
NIO Inc, NIO. EVs, China-based startup premium vehicles, battery as a service.
Piedmont Lithium, PLL. Lithium, US domestic source battery-grade lithium.
Quantumscap, QS. Battery, solid state lithium-metal energy dense fast charge.
Rivian, RIVN. Electric vehicles, trucks and commercial fleets, charging
SES AI Corp, SES. Li-metal anode battery, may be safer, faster-charging.
Sigma Lithium, SGML. Lithium, in planning & pre-construction, sites in Brazil.
Solid Power, SLDP. Solid electrolyte battery, Earth-abundant materials.
Standard Lithium, SLI. Lithium, from brine in U.S., vs. traditional ponds.
Tesla, TSLA. Electric vehicles, pure-play across EVs, advanced energy storage.
Workhorse, WKHS. Electric Vehicles, large electric delivery trucks, early-stage.
Xpeng, XPEV. Electric vehicles, advanced mobility, swappable batteries, China.

Power Delivery & Conservation - 27% sector (19 stocks @1.34% each + 3 *banded)

Ameresco, AMRC. Energy saving efficiencies, net zero CO₂, decarbonization.
**American Superconductor*, AMSC. Wind, grid conditioning; superconductors.
Archer Aviation, ACHR. Electrifying aircraft, vertical takeoff & landing.
**Arcimoto*, FUV. EVs, smaller very low-cost 3 wheeled electric vehicles.
Blink Charging, BLNK. EV Charging, among bigger EV charging networks.
Canoo, GOEV. Electric delivery vehicles, configurable and multipurpose.
Chargepoint, CHPT. EV Charging, global including for fleets and businesses.
**Electrameccanica Vehicles*, SOLO. EVs, 3 wheel; custom electric vehicles.

EVgo, EVGO. EV Charging, DC fast-charging Networks, renewable power.
Fisker, FSR. EV crossover SUV, is assembled by contract manufacturer.
Gogoro, GGR. Electric scooters, swappable battery stations, Taiwan-based.
Infrastructure and Energy, IEA. Renewables, power generation to delivery.
Itron, ITRI. Meters, utility energy monitoring, measurement & management.
Joby Aviation, JOBY. Electric aircraft, cleaner, more energy efficient.
Lilium, LILM. Electric jet aircraft, eVTOLs for vertical takeoff & landing.
MYR Group, MYRG. Grid transmission, distribution aids solar & wind farms.
Quanta Services, PWR. Infrastructure, modernizes grid & power transmission.
Ree Automotive, REE. EVs, modular propulsion and steering in wheel arch.
Shoals, SHLS. Solar, for electric balance of system, wiring, combiners.
Universal Display, OLED. Organic light emitting diodes, efficient displays.
View, VIEW. Smart glass, shades electronically, reduces solar heating.
Wallbox, WBX. EV Charging, allows bi-directional vehicle to grid, V2G.

Energy Conversion - 22% sector weight (17 stocks @1.29% each)

Advanced Energy, AEIS. Power conditioning: inverters, thin film deposition.
Ballard Power, BLDP. Mid-size fuel cells; PEM such as in transportation.
Bloom Energy, BE. Stationary fuel cells, not-yet cleanest/renewable fuels.
Energy Vault, NRGV. Gravity energy storage; can repurpose old wind blades.
Enphase, ENPH. Microinverters, also energy storage systems and software.
ESCO Technologies, ESE. Power management, shielding, controls, testing.
FuelCell Energy, FCEL. Stationary fuel cells, distributed power generation.
Gentherm, THRM. Thermoelectrics, heat energy, battery management.
Hyzon Motors, HYZN. H₂ fuel cell powered heavy trucks, buses, coaches.
Li-Cycle, LICY. Battery Recycling, closed-loop of lithium, other materials.
Lightning eMotors, ZEV. Electric powertrain conversions, heavy vehicles.
MP Materials, MP. Rare Earths, domestic U.S. source Neodymium, NdPr.
Navitas Semiconductor, NVTX. Gallium Nitride GaN fast charging EVs.
Plug Power, PLUG. Small fuel cells, for eg forklifts; drop in replacements.
SolarEdge Technologies, SEDG. Inverters, solar optimizers, inverters.
Tritium, DCFC. Ultra-fast EV charging networks, Australia and worldwide.
Wolfspeed, WOLF. Electrifying power, Silicon Carbide SiC, converters.

Greener Utilities - 8% sector weight (6 stocks @1.25% each + 1 *banded)

**Beam*, BEEM. EV Charging, rapidly deployable portable PV power platform.
Brookfield Renewable, BEPC. Renewables hydro, wind, solar; energy storage.
ReNew Energy, RNW. India renewables, among largest there in solar & wind.
Stem, STEM. Microgrids, smart new energy storage via machine learning.
Sunnova, NOVA. Solar provider, operating fleet for residential, plus storage.
SunPower, SPWR. Solar system provider, storage and distributed generation.
Sunrun, RUN. Residential solar systems, PPA, lease or purchase rooftop PV.

Cleaner Fuels - 2% sector weight (2 stocks @1.00% each)

Gevo, GEVO. Biofuels, lower carbon liquid fuels from renewable sources.
Heliogen, HLGX. Concentrating solar mirrors, hydrogen with no fossil fuels.