INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q4 2020. 46 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 - 23% weight (10 stocks @2.30% each) Azure Power Global, AZRE. Solar, India; aims to be 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. Hexcel, HXL. Light composites, in wind blades & spars, aerospace, vehicles. JinkoSolar, JKS. Solar, wafers through solar modules, China-based OEM. Maxeon, MAXN. Solar, PV panel maker after 2020 spinoff from Sunpower. Ormat, ORA. Geothermal, also in areas of recovering heat energy. SunPower, SPWR. Solar, distributed sales and services; Maxeon panels. TPI Composites, TPIC. Wind Blades; also light-weighting for transportation.

Energy Conversion - 23% sector weight (10 stocks @2.30% each) Advanced Energy, AEIS. Power conditioning: inverters, thin film deposition. Ballard Power, BLDP. Mid-size fuel cells; R&D, PEM FCs as in transportation. Bloom Energy, BE. Stationary fuel cells, not-yet cleanest/renewable fuels. Cree, CREE. Power electronics, moved into power devices including for EVs. Enphase, ENPH. Microinverters, also energy storage systems and software. ESCO Technologies, ESE. Power management, shielding, controls, testing. FuelCell Energy, FCEL. Stationary fuel cells, for distributed power generation. Gentherm, THRM. Thermoelectric, waste heat energy, battery management. Plug Power, PLUG. Small fuel cells, for e.g. forklifts; drop in replacements. SolarEdge Technologies, SEDG. Inverters, makes solar optimizers, inverters.

Power Delivery & Conservation - 22% sector (10 stocks @2.15 each +1 *banded) Ameresco, AMRC. Energy saving efficiencies, net zero CO2 decarbonization. American Superconductor, AMSC. Wind, grid conditioning; superconductors. Blink Charging, BLNK. EV Charging, among largest EV charge networks in U.S. *Infrastructure and Energy, IEA. Renewables, from power generation to delivery. Itron, ITRI. Meters, utility energy monitoring, measurement & management. MYR Group, MYRG. Transmission and Distribution, includes solar & wind farms. Quanta Services, PWR. Infrastructure, modernizing grid & power transmission. Universal Display, OLED. Organic light emitting diodes, efficient displays. Veeco, VECO. Thin film equipment, for LEDs, energy efficient electronics. Willdan, WLDN. Efficiency, in distributed energy, renewables, engineering. Woodward, WWD. Converters, controls for wind power and energy storage.

<u>Greener Utilities</u> - 7% sector weight (3 stocks @2.33% each) Atlantica Yield, AY. Yieldco, Contracted renewables assets, also transmission. Sunnova, NOVA. Solar provider, operating fleet for residential plus storage. Sunrun, RUN. Residential solar systems, lease, PPA or purchase rooftop PV.

Energy Storage - 21% sector weight (8 stocks @2.50% each plus 2 *banded) *Albermarle*, ALB. Lithium, specialty materials in batteries; for energy storage. **Arcimoto*, FUV. EVs, smaller very low-cost 3 wheeled electric vehicles. *Chemical & Mining of Chile*, SQM. Lithium, energy storage, large producer. *Electrameccanica Vehicles, SOLO. EVs, 3 wheeled and custom electric vehicles. Kandi, KNDI. Electric Vehicles, inexpensive small cars, early-stage, China-based. Lithium Americas, LAC. Lithium, deposits in State of Nevada U.S., & Argentina. Livent, LTHM. Lithium, and compounds for batteries in energy storage. NIO Inc, NIO. Electric vehicles, China-based startup but loss-making so far. Tesla, TSLA. Electric vehicles, solar; pure-play EVs & energy storage. Workhorse, WKHS. Electric Vehicles, electric delivery trucks, early-stage.

<u>Cleaner Fuels</u> - 4% sector weight (2 stocks @2.00% each) *Air Products & Chemicals*, APD. Hydrogen, is a supplier of industrial gases. *Renewable Energy Group*, REGI. Biodiesel, natural fats, oils, grease to biofuels.