

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q2 2016. 40 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 - 30% sector weight (9 stocks @3.27% each; +1 banded)

Canadian Solar, CSIQ. Solar, vertically integrated solar manufacturer, China.

China Ming Yang Wind, MY. Wind, large turbine manufacturer is a pure play.

**Daqo New Energy*, DQ. Solar, polysilicon/wafer manufacturer; China-based.

First Solar, FSLR. Thin film solar, CdTe a low-cost alternate to polysilicon.

Hanwha Q Cells, HQCL. Solar, integrated from poly through modules.

Hexcel, HXL. Light composites, in wind blades & spars, aerospace, vehicles.

JA Solar, JASO. Solar, China-based sells PV modules in Asia, Europe, U.S.

Ormat, ORA. Geothermal, works too in areas of recovered heat energy.

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

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

Power Delivery & Conservation - 21% sector weight (8 stocks @2.56%; +1 *banded)

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

Cree, CREE. LEDs, manufacturer in power-saving lumens, efficient lighting.

**Energy Focus*, EFOI. Efficiency, LEDs and entire lighting systems solutions.

EnerNoc, ENOC. Demand response; better energy management, smart grid.

Itron, ITRI. Meters, utility energy monitoring, measurement & management.

ITC Holdings, ITC. Grid transmission, better integration for wind/renewables.

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

SunEdison, SUNE. Producer of polysilicon; also growing its solar services.

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

Greener Utilities - 18% sector weight (6 stocks @2.91% each; + 1 *banded stock)

Pattern Energy, PEGI. Wind farms, solar may be added too for GW sized PPAs.

Opower, OPWR. Utility software, advanced cloud based, customer-interfacing.

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

**Sky Solar*, SKYS. Solar farms, creating & operating utility-scale projects.

Sunrun, RUN. Residential solar systems, lease, PPA or purchase rooftop PV.

TerraForm Global, GLBL. Owns operates renewable assets in emerging nations.

TerraForm Power, TERP. Owns operates solar/wind in developed regions, yieldco.

Energy Conversion - 15% sector weight (5 stocks @2.80% each; +2 *banded stocks)

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

Ballard Power, BLDP. Mid-size fuel cells; R&D, PEM FCs as in transportation.

**Enphase*, ENPH. Microinverters, PV panel DC becomes grid compliant AC.

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

Plug Power, PLUG. Small fuel cells, for e.g. forklifts; drop in replacements.

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

SolarEdge Technologies, SEDG. Inverters: makes solar optimizers, inverters.

Energy Storage - 8% sector weight (2 stocks @3.50%; +2 *banded stocks)

**Hydrogenics*, HYGS. Hydrogen, electrolysis generation & fuel cells, H2 storage.

**Maxwell*, MXWL. Ultracapacitors, an alternative assisting batteries in hybrids.

SolarCity, SCTY. Solar + Energy Storage, for homes, businesses, governments.

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

Cleaner Fuels - 8% sector weight (3 stocks @2.66%)

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

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

Renewable Energy Group, REGI. Biodiesel, natural fats, oils, greases to biofuels.