

INDEX (ECO) SECTOR & STOCK WEIGHTS FOR THE START OF Q2 2010. 54 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 - 29% sector weight (11 stocks @2.45% each; +4 banded stocks)

**Ascent Solar, ASTI.* Solar, early-development stages for thin film CIGS flexible PV.

Broadwind Energy, BWEN. Wind, holds firms across supply chain for wind energy.

Canadian Solar, CSIQ. Solar, China based vertical-integrated solar manufacturer.

**Emcore, EMKR.* Solar, Concentrating PV, CPV for terrestrial uses, also for satellites.

Energy Conversion, ENER. Thin film, amorphous flexible PV panels; also batteries.

First Solar, FSLR. Thin film, CdTe solar panels reduce silicon need, and costs.

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

**Ocean Power Technologies, OPTT.* Wave power, in speculative very early-stage.

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

SunPower, SPWR. Solar, Efficient PV panels with all-rear-contact cells.

SunTech Power, STP. Solar, major producer of PV and is based in China.

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

**U.S. Geothermal, HTM.* Geothermal, site acquisition, PPAs, development-stage.

Yingli Green Energy, YGE. Vertically-integrated solar PV manufacturer, China.

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

Power Delivery & Conservation - 30% sector weight (13 stocks @2.30%)

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

Applied Materials, AMAT. PV & semi fabrication, LCD displays, crystalline solar.

Comverge, COMV. Demand-side energy management, building smarter grids.

Cree, CREE. LEDs for efficient lighting, manufacturer for power-saving lights.

Echelon, ELON. Networking, better management of whole energy systems.

GT Solar, SOLR. Solar, PV manufacturing lines with automated fabrication.

Itron, ITRI. Energy monitoring, new measurement and management systems.

MEMC, WFR. Producer of polysilicon used in many crystalline solar PV cells.

Quanta Services, PWR. Infrastructure, modernized grid, smart power transmission.

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

Rubicon, RBCN. Maker of substrates used in production of LEDs and lighting.

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

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

Energy Storage - 15% sector weight (6 stocks @2.25% each; +3 banded stocks)

Advanced Battery, ABAT. Batteries, China based maker of Li-ion for diverse uses.

A123 Systems, AONE. Batteries, nano phosphate for new EVs, grid, portable power.

**Beacon, BCON.* Flywheels, non-chemical firm power alternative; also inverters.

**China BAK, CBAK.* Batteries, large China based OEM manufacturer of Li-ion cells.

Ener1, HEV. Batteries, diverse in Li-ion power storage, nanotechnology; fuel cells.

Maxwell, MXWL. Ultracapacitors, alternative supplement to batteries, hybrids, UPS.

OM Group, OMG. Cobalt and other precursors, producer for Li-Ion batteries, FCs.

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

**Valence, VLNC.* Batteries, phosphate-based lithium cells address thermal events.

Energy Conversion - 14% sector weight (6 stocks @2.00% each; +4 banded stocks)

American Superconductor, AMSC. Wind power converters; and superconductor HTS.

Amerigon, ARGN. Thermoelectrics, in waste heat to power energy conversion.
Ballard Power, BLDP. Mid-size fuel cell R&D, PEM FCs potential for transportation.
FuelCell Energy, FCEL. Large fuel cells as stationary high-temp flex-fuel MCFCs.
Fuel Systems Solutions, FSYS. Gaseous fuels, for ICEs in cleaner-fuel vehicles.
International Rectifier, IRF. Energy-saving in power conversion and conditioning.
**Quantum*, QTWW. Alternative fuels for vehicle propulsion; also solar nexus.
**Raser*, RZ. Speculative stage licensing firm, small geothermal & electric motors.
**Satcon*, SATC. Inverters, DC/AC conversion for larger utility-scale renewables.
**UQM Technologies*, UQM. Motors and controller systems, EVs & hybrid vehicles.

Cleaner Fuels - 5% sector weight (2 stocks @2.25% each +1 banded stock)

Air Products & Chemicals, APD. Hydrogen, is a supplier of industrial gases.
Cosan, CZZ. Biofuels, Brazil based uses sugarcane feedstock, an ethanol exporter.
**Gushan*, GU. Biodiesel, vegetable oil, used-cooking oil etc feedstock; China based.

Greener Utilities - 7% sector weight (4 stocks @1.75% each)

Calpine, CPN. Geothermal: a major North American producer; low-carbon assets.
CPFL Energia S.A., CPL. Brazil Utility with both large and small hydroelectric.
Idacorp, IDA. Hydroelectric, Utility with sizeable hydroelectric, some small hydro.
Portland General Electric, POR. Utility with hydro & thermal, growing renewables.