INDEX (ECO) SECTOR & STOCK WEIGHTS FOR START OF Q1 2012. 56 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.

<u>Renewable Energy Harvesting</u> - 23% sector weight (10 stocks @2.15 each; +3 banded)
**Canadian Solar,* CSIQ. Solar, vertically integrated solar PV manufacturer, China.
China Ming Yang Wind, MY. Wind, large turbine manufacturer is a pure play.
**Daqo New Energy,* DQ. Polysilicon, expanding downstream to making modules.
First Solar, FSLR. Thin film, CdTe solar panels reducing silicon need and cost.
**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.
SunPower, SPWR. Solar, efficient PV panels have all-rear-contact cells.
SunTech Power, STP. Solar, major producer of global PV based in China.
Trina Solar, TSL. Solar, produces ingots, wafers, solar modules; China-based.
Yingli Green Energy, YGE. Solar, is vertically integrated PV manufacturer.
Zoltek, ZOLT. Wind, makes carbon fiber for wind blades, product lightening.

<u>Power Delivery & Conservation</u> - 24% sector weight (10 stocks @2.20% each; +4 banded)
Aixtron Aktiengesellschaft, AIXG. Deposition tools, efficient (O)LEDs, displays.
Ameresco, AMRC. Energy saving performance contracts, also in renewables.
**Amtech Systems,* ASYS. Solar, produces equipment to manufacture solar cells.
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.
**Lime Energy,* LIME. Efficiency, energy-savings expertise in demand reduction.
MEMC, WFR. Producer of polysilicon used in many crystalline c-Si solar PV cells.
**PowerSecure,* POWR. Smart grid, demand response, distributed generation; LEDs.
Quanta Services, PWR. Infrastructure, modernizing grid and power transmission.
**ReneSola,* SOL. Wafers, for silicon PV, mono and multicrystalline, China-based.
STR Holdings, STRI. Encapsulants, broad technology for range of PV panels.

<u>Energy Storage</u> - 11% sector weight (5 stocks @2.20% each)
A123 Systems, AONE. Batteries, nanophosphate for EVs, the grid, portable power.
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.
Sociedad de Chile, SQM. Lithium, major Li supplier for batteries; also STEG storage.

<u>Energy Conversion</u> - 25% sector weight (10 stocks @2.20% each; +6 banded stocks)
American Superconductor, AMSC. Wind power converters; superconducting HTS.
Amerigon, ARGN. Thermoelectrics, waste heat to power energy conversion.
**Ballard Power,* BLDP. Mid-size fuel cell R&D, FCs potential in transportation.
Cree, CREE. LEDs, manufacturer in power-saving lumens, efficient lighting.
**FuelCell Energy*, FCEL. Large fuel cells, stationary high-temp flex-fueled MCFCs.
Fuel Systems Solutions, FSYS. Gaseous fuels, ICEs in cleaner-fueled vehicles.
International Rectifier, IRF. Energy-saving, power conversion and conditioning.

Molycorp, MCP. Rare Earths, strategic elements in NdFeB magnets, wind power.
Power-One, PWER. Power conditioning, inverters & converters for renewables.
**Rare Element Resources,* REE. Rare Earths, holdings for strategic lanthanides.
Rubicon, RBCN. Substrates, are used in the production of LEDs for lighting.
**Satcon*, SATC. Inverters, DC/AC conversion in large utility-scale renewables.
**SemiLEDS*, LEDS. Higher brightness LED chips, Taiwan-based manufacturer.
Tesla Motors, TSLA. Electric vehicles, new pure-play in EVs, power systems.
Universal Display, PANL. Organic light emitting diodes, OLED panel displays.
**UQM Technologies,* UQM. Motors, control systems for EVs & hybrid vehicles.

Cleaner Fuels - 10% sector weight (4 stocks @2.37% each; +1 banded stock)
Air Products & Chemicals, APD. Hydrogen, is a supplier of industrial gases.
Amyris, AMRS. Biotech, speculative R&D for drop-in renewable diesel, jet fuels.
Cosan, CZZ. Biofuels, Brazil-based uses sugarcane feedstock, ethanol exporter.
**Gevo,* GEVO. Biotech, speculative R&D drop-in isobutanol, renewable biofuels.
Solazyme, SZYM. Biofuels, microalgae grown w/o sun, drop-in diesel substitute.

Greener Utilities – 7% sector weight (3 stocks @2.33% 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 has sizeable hydroelectric, some small hydro.