

<b><u>Name</u></b>	<b><u>Description</u></b>	<b><u>Sector</u></b>
2G Energy AG	Hydrogen, biogas, and combined heat and power.	ECV
Acciona	Operates Wind, Solar/thermal, Hydro, Biomass plants.	RWD
Albioma SA	Biomass, sugarcane, hybrid combustion, cogeneration.	RBB
Alfen NV	Electric Vehicle charging, smart grid, energy storage.	EEF
Ameresco	Energy savings, performance contracts, renewables.	EEF
American Superconductor	Wind turbines, and grid power transmission.	RWD
Arcosa	Wind tower structures, grid power and infrastructure.	RWD
Array Technologies	Solar, ground-mounted axis sun trackers.	RSR
Azure Power Global	Solar, India, aims to offer lowest-cost electricity.	RSR
Ballard Power Systems	Fuel cells, PEMs used in transportation and more.	ECV
Bloom Energy	Stationary fuel cells, distributed but non-renewable.	ECV
Boralex	Renewables generation, operates wind, hydro, solar.	RWD
BYD Co.	Electric vehicles, batteries, rail, and more.	ENS
Canadian Solar	Solar, vertically integrated solar manufacturer, China.	RSR
Caverion OYJ	Energy efficiency, buildings, infrastructure, Europe.	EEF
Ceres Power	Fuel cells, high temperature steel units.	ECV
Cree Inc.	Power electronics, electrifying powertrains, SiC, LEDs.	EEF
CropEnergies AG	Bioethanol, from cereals and sugarbeet, Germany.	RBB
CS Wind	Wind power, both onshore, and also offshore.	RWD
Daqo New Energy	Solar, high-purity polysilicon for solar wafers, China.	RSR
Doosan Fuel Cell	Fuel cells, high temperature and hydrogen, S. Korea.	ECV
EDP Renovaveis SA	Wind power, among largest producers in world, Iberia.	RWD
Encavis AG	Solar, large solar park operator, also wind, Germany.	RSR
Enlight Renewable	Solar & wind power, clean energy storage & infrastructure.	RSR
Enphase	Inverters, micro-products for solar panels, storage.	RSR
Eolus Vind	Wind power, also consulting services for wind.	RWD
Eos Energy	Batteries, zinc chemistry for stationary grid storage.	ENS
Falck Renewables SpA	Renewable wind, biomass, WtE, solar, Europe.	RWD
First Solar	Thin film solar, CdTe low-cost alternate to polysilicon.	RSR
Flat Glass Group	PV panel glass, solar plants engineering & construction	RSR
FuelCell Energy	Fuel cells, high temperature and hydrogen.	ECV
Fisker	Electric cars, electric SUVs, with contract manufacturer.	ENS
Ganfeng Lithium	Lithium, production of compounds, metals, for batteries.	ENS
Greencoat UK Wind plc	Infrastructure fund, invested in U.K. wind power assets.	RWD
GreenPower Motor	Electric vehicles, transit, school and charter buses.	ENS
Grenergy Renovables SA	Solar projects, and wind, batteries, Spain, Latin America.	RSR
GS Yuasa	Battery technologies, also lithium for EVs, Japan.	ENS
Gurit Holding AG	Composite Materials in wind, lightens cars, planes.	RWD
Hannon Armstrong	Energy efficiency, capital & finance for infrastructure.	EEF
Ijijn Materials	Rechargeable battery materials, elecfoils for batteries..	ENS
Innergex Renewable	Renewable power, run-of-river hydro, wind, solar.	ROH
ITM Power plc	Fuel cells, uses PEM technology; also hydrogen.	ECV
Itron	Meters, Utility energy monitor, measuring & manage.	EEF
JinkoSolar	Solar, wafers through solar modules, China OEM.	RSR

Kingspan Group plc	Efficient Buildings, insulation for conservation, Ireland.	EEF
Landis+Gyr Group AG	Advanced meters, modernizing grid, Switzerland.	EEF
Lithium Americas	Lithium, projects in Nevada USA, and in Argentina.	ENS
Livent	Lithium, production of compounds, batteries.	ENS
Lordstown Motors	Electric Vehicles, pickup trucks, telematics.	ENS
Maxeon Solar	Solar panel manufacturer, a spinoff from Sunpower.	RSR
McPhy Energy	Hydrogen, electrolyzers using water, H2 storage.	ECV
Mercury NZ	Clean power, 100% renewable hydro, geothermal.	ROH
Meridian Energy	Hydroelectric power stations, some wind, New Zealand.	ROH
Motech	Solar, cells and modules manufacturing.	RSR
Nel ASA	Hydrogen, in fuel cell vehicles, renewably, Norway.	ECV
Neoen SA	Renewable energy, mainly in solar, some wind.	RSR
Nibe Industrier AB	Heating & cooling, sustainable technologies, Sweden.	EEF
Nio	Electric Vehicles, design, manufacture, premium EVs.	ENS
Nordex SE	Wind turbines, based in Germany/Europe, worldwide.	RWD
Novozymes A/S	Biofuels, enzymes used in partnerships, Denmark.	RBB
Ormat	Geothermal, works too in recovered heat energy.	ROH
Orsted A/S	Sustainable wind, also biomass, thermal, Denmark.	RWD
Plug Power	Small fuel cells, e.g. in forklifts; drop in replacements.	ECV
PNE AG	Wind Farms, both onshore & offshore; also hydrogen.	RWD
Powercell Sweden	Fuel cells, transportation, marine, stationary uses.	ECV
Prysmian SpA	Cables, renewable power transmission, global.	EEF
Quantumscape	Lithium metal batteries, solid state, quicker charge.	ENS
ReneSola	Solar, project developer and operator, worldwide.	RSR
Renewable Energy Group	Biodiesel, natural fats, oils, grease to biofuels.	RBB
Renewables Infrastructure	Wind Farm & Solar Park revenues assets, U.K.	RWD
Renova	Wind, Solar, Biomass, power generation in Asia.	RWD
Royal DSM	Biofuels, reduction of CO2 and methane emissions.	RBB
Samsung SDI	Batteries, innovative energy storage, EVs, South Korea.	ENS
Scatec ASA	Solar parks, develops, owns and operates worldwide.	RSR
Siemens Gamesa	Wind, onshore & offshore, turbines, gearboxes, Spain	RWD
Signify NV	Lighting, systems increasing efficiency, Netherlands.	EEF
Sino-American Silicon	Solar, semi-conductor silicon wafer materials, Taiwan.	RSR
SMA Solar Technologies	Inverters for solar, industrial scale storage, Germany.	RSR
Sociedad Quimica Chile	Lithium, a key element in advanced batteries, Chile.	ENS
SolarEdge	Inverters, panel-level solar optimizers, micro-inverters.	RSR
Solaria Energia	Solar, renewable power generation, Iberia.	RSR
Solarpack Corporacion	Solar plants, engineering and operations, globally.	RSR
Sunnova	Residential solar and energy storage installation.	RSR
SunPower	Solar, efficient PV panels with rear-contact cells.	RSR
Sunrun	Residential solar, leasing, PPA or purchase rooftop PV.	RSR
Terna SpA	Transmission of electricity, increasingly is renewables.	EEF
Tilt Renewables	Wind Farms, Australia and New Zealand, some solar.	RWD
TPI Composites	Wind Blades; also light-weighting for transportation.	RWD
TransAlta Renewables	Renewables, operating wind power, some hydro.	RWD

United Renewable Energy	Solar, also energy storage, hydrogen and fuel cells.	RSR
Universal Display	Organic light emitting diodes, efficient displays.	EEF
Veeco instruments	Thin film equipment LEDs, energy efficient electronics.	EEF
Verbio Vereinigte BioEn.	Biofuels, manufacturer supplier to Germany, Europe.	RBB
Verbund AG	Electricity supplier, hydro, a large provider for Austria.	ROH
Vestas Wind Systems A/S	Wind, wind turbine manufacturing & services, Denmark.	RWD
West Holdings	Solar, Japan-focused residential and commercial PV.	RSR
Willdan Group	Energy efficiency in infrastructure, engineering.	EEF
Xebec Adsorption	Gases for new renewable energies, hydrogen.	EEF
Xinjiang Goldwind	Wind, large turbine manufacturer, China.	RWD
Xinyi Energy Holdings	Solar Farms, a spin-off from Xinyi solar glass, China.	RSR
Xinyi Solar Holdings	Solar, ultra-clear glass products, China.	RSR
Xpeng Motors	Electric Vehicles, internet and autonomous features.	ENS

### WEIGHT EACH COMPONENT for Q1 2021

102 stocks/100 = Individua

0.98039216

Deletions for Q1 2021: 9517.T, 2393.TW, 086520.KQ, GREEN.S.

Adds for Q1: 2GBG.DE, 1772.HK, 6865.HK, 336260.KS, 020150.KS, 6244.TWO, 3576.TW, ALFEN.AS, AR AMSC.OQ, DSMN.AS, ENLT.TA, EOSE.OQ, FSR.N, GP.OQ, GREG.MC, LTHM.N, QS,N, RIDE.OQ, SOL.N, :

102 Stocks for Start of Q1 2021.

<u>NEX SECTOR WEIGHTS fo SECTOR</u>		<u>QUANT</u>
Energy Conversion	ECV	11
Energy Efficiency	EEF	16
Energy Storage	ENS	15
Renewables - Biofuels	RBB	6
Renewables - Other	ROH	5
Renewable - Solar	RSR	28
Renewable - Wind	RWD	21
		<hr/> 102

<u>Currency</u>	<u>Activity</u>
EUR	GERMANY
EUR	SPAIN
EUR	FRANCE
EUR	NETHERLANDS
USD	US
USD	US
USD	US
USD	US
USD	INDIA
CAD	CANADA
USD	US
CAD	CANADA
HKD	CHINA
USD	CANADA
EUR	FINLAND
GBP	BRITAIN
USD	US
EUR	GERMANY
KRW	S. KOREA
USD	CHINA
KRW	S. KOREA
EUR	SPAIN
EUR	GERMANY
ILS	ISRAEL
USD	US
SEK	SWEDEN
USD	US
EUR	ITALY
USD	US
HKD	CHINA
USD	US
USD	US
HKD	CHINA
GBP	BRITAIN
USD	CANADA
EUR	SPAIN
JPY	JAPAN
CHF	SWITZERLAND
USD	US
KRW	S. KOREA
CAD	CANADA
GBP	BRITAIN
USD	US
USD	CHINA

EUR	IRELAND
CHF	SWITZERLAND
USD	US
USD	US
USD	US
USD	US
EUR	FRANCE
NZD	NEW ZEALAND
NZD	NEW ZEALAND
TWD	TAIWAN
NOK	NORWAY
EUR	FRANCE
SEK	SWEDEN
USD	CHINA
EUR	GERMANY
DKK	DENMARK
USD	US
DKK	DENMARK
USD	US
EUR	GERMANY
SEK	SWEDEN
EUR	ITALY
USD	US
USD	CHINA
USD	US
GBP	BRITAIN
JPY	JAPAN
EUR	NETHERLANDS
KRW	S. KOREA
NOK	NORWAY
EUR	SPAIN
EUR	NETHERLANDS
TWD	TAIWAN
EUR	GERMANY
USD	US
USD	US
EUR	SPAIN
EUR	SPAIN
USD	US
USD	US
USD	US
EUR	ITALY
NZD	NEW ZEALAND
USD	US
CAD	CANADA

TWD	TAIWAN
USD	US
USD	US
EUR	GERMANY
EUR	AUSTRIA
DKK	DENMARK
JPY	JAPAN
USD	US
CAD	CANADA
HKD	CHINA
RSR	CHINA
HKD	CHINA
USD	CHINA

RY.OQ,  
SPK.MC.

**% Approx. Weight**

**11%**

**16%**

**15%**

**6%**

**5%**

**27%**

**20%**

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**100%**