

<u>Name</u>	<u>Description</u>	<u>Sector</u>	<u>Currency</u>	<u>Activity</u>
2G Energy AG	Hydrogen, biogas, and combined heat and power.	ECV	EUR	GERMANY
Abalance	Solar, from planning to operations; also PV products.	RSR	JPY	JAPAN
Acciona SA	Sustainable infrastructure, has separate renewables.	RWD	EUR	SPAIN
AFC Energy	Fuel cells, alkaline has greater H2 fuels tolerance.	ECV	GBP	UK
Aker Offshore Wind	Offshore wind, new floating deepwater technologies.	RWD	NOK	NORWAY
Alfen NV	Electric Vehicle charging, smart grid, energy storage.	EEF	EUR	NETHERLANDS
Ameresco	Energy savings, performance contracts, renewables.	EEF	USD	US
American Superconductor	Wind turbines, and grid power transmission.	RWD	USD	US
Arcosa	Wind tower structures, grid power and infrastructure.	RWD	USD	US
Array Technologies	Solar, ground-mounted axis sun trackers.	RSR	USD	US
Azure Power Global	Solar, India, aims to offer lowest-cost electricity.	RSR	USD	INDIA
Ballard Power Systems	Fuel cells, PEMs used in transportation and more.	ECV	CAD	CANADA
Bloom Energy	Stationary fuel cells, distributed but non-renewable.	ECV	USD	US
Boralex	Renewables generation, operates wind, hydro, solar.	RWD	CAD	CANADA
BYD Co.	Electric vehicles, batteries, rail, and more.	ENS	HKD	CHINA
Cadeler A/S	Offshore windfarm installation vessels, specialized.	RWD	NOK	DENMARK
Canadian Solar	Solar, vertically integrated solar manufacturer, China.	RSR	USD	CANADA
Canoo	Electric delivery vehicles, configurable, multipurpose.	EEF	USD	US
Cell Impact AB	Fuel Cells, stamped bipolar, PEM flow field plates.	ECV	SEK	SWEDEN
Ceres Power	Fuel cells, high temperature steel units.	ECV	GBP	UK
Chargepoint	EV charging, an early leader with global presence.	EEF	USD	US
China Datang Renewable	Wind, among largest listed wind operators in China.	RWD	HKD	CHINA
Corp. Acciona Energias	Renewables, one of world's biggest: wind, solar etc.	RWD	EUR	SPAIN
CropEnergies AG	Bioethanol, from cereals and sugarbeet, Germany.	RBB	EUR	GERMANY
CS Wind	Wind power, both onshore, and also offshore.	RWD	KRW	S. KOREA
Daqo New Energy	Solar, high-purity polysilicon for solar wafers, China.	RSR	USD	CHINA
Doosan Fuel Cell	Fuel cells, high temperature and hydrogen, S. Korea.	ECV	KRW	S. KOREA
Ecopro BM	Battery materials, cathode and precursor for Li-ion.	ENS	KRW	S. KOREA
EDP Renovaveis SA	Wind power, among largest producers in world, Iberia.	RWD	EUR	SPAIN
Electreon Wireless	Wireless road charging, for EVs while driving.	EEF	ILS	ISRAEL
Encavis AG	Solar, large solar park operator, also wind, Germany.	RSR	EUR	GERMANY
Energiekontor AG	Wind farms, also solar parks in Germany.	RWD	EUR	GERMANY

Enlight Renewable	Solar & wind power, clean energy storage infrastructure.	RSR	ILS	ISRAEL
Enphase	Inverters, micro-products for solar panels, storage.	RSR	USD	US
Eolus Vind	Wind power, also consulting services for wind.	RWD	SEK	SWEDEN
Eos Energy	Batteries, zinc chemistry for stationary grid storage.	ENS	USD	US
Evgo	EV charging, an early leader in fast charging.	EEF	USD	US
Fastned BV	EV charging, uses wind and solar power, Europe.	EEF	EUR	NETHERLANDS
First Solar	Thin film solar, CdTe low-cost alternate to polysilicon.	RSR	USD	US
Fisker	Electric cars, electric SUVs, with contract manufacturer.	ENS	USD	US
Flat Glass Group	PV panel glass, solar plants engineering & construction	RSR	HKD	CHINA
Freyr Battery SA	Batteries, decarbonization includes cell manufacturing.	ENS	USD	NORWAY
FTC Solar	Solar, ground mounted trackers; also PV software.	RSR	USD	US
FuelCell Energy	Fuel cells, high temperature and hydrogen.	ECV	USD	US
Ganfeng Lithium	Lithium, production of compounds, metals, for batteries.	ENS	HKD	CHINA
GenCell Ltd.	Fuel cells, hydrogen from ammonia, remote power.	ECV	ILS	ISRAEL
Gevo	Biofuels, lower carbon liquid fuels, renewable sources.	RBB	USD	US
Grenergy Renovables SA	Solar projects, and wind, batteries, Spain, Latin America.	RSR	EUR	SPAIN
GS Yuasa	Battery technologies, also lithium for EVs, Japan.	ENS	JPY	JAPAN
Gurit Holding AG	Composite Materials in wind, lightens cars, planes.	RWD	CHF	SWITZERLAND
Hannon Armstrong	Energy efficiency, capital & finance for infrastructure.	EEF	USD	US
Ijin Materials	Rechargeable battery materials, elecfoils for batteries..	ENS	KRW	S. KOREA
Innergex Renewable	Renewable power, run-of-river hydro, wind, solar.	ROH	CAD	CANADA
ITM Power plc	Fuel cells, uses PEM technology; also hydrogen.	ECV	GBP	UK
Itron	Meters, Utility energy monitor, measuring & manage.	EEF	USD	US
JinkoSolar	Solar, wafers through solar modules, China OEM.	RSR	USD	CHINA
Joby Aviation	Electric Aircraft, more efficient transportation.	EEF	USD	US
Kingspan Group plc	Efficient Buildings, insulation for conservation, Ireland.	EEF	EUR	IRELAND
Landis+Gyr Group AG	Advanced meters, modernizing grid, Switzerland.	EEF	CHF	SWITZERLAND
Li-Cycle	Recycling lithium-ion batteries, recover raw material.	ENS	USD	US
Lilium NV	Electric Aircraft, vertical takeoff and landing.	EEF	USD	GERMANY
Lion Electric	Electric Vehicles, urban trucks, buses, V2G.	ENS	USD	CANADA
Lithium Americas	Lithium, projects in Nevada USA, and in Argentina.	ENS	USD	US
Livent	Lithium, production of compounds, batteries.	ENS	USD	US
Lordstown Motors	Electric Vehicles, pickup trucks, telematics.	ENS	USD	US

Lucid	Electric Vehicles, premium, higher-voltage, range.	EEF	USD	US
Maxeon Solar	Solar panel manufacturer, a spinoff from Sunpower.	RSR	USD	US
McPhy Energy	Hydrogen, electrolyzers using water, H2 storage.	ECV	EUR	FRANCE
Mercury NZ	Clean power, 100% renewable hydro, geothermal.	ROH	NZD	NEW ZEALAND
Meridian Energy	Hydroelectric power stations, some wind, New Zealand.	ROH	NZD	NEW ZEALAND
Motech	Solar, cells and modules manufacturing.	RSR	TWD	TAIWAN
MP Materials	Rare Earths, US sourced strategic Neodymium, NdPr.	ECV	USD	US
Nel ASA	Hydrogen, in fuel cell vehicles, renewably, Norway.	ECV	NOK	NORWAY
Neoen SA	Renewable energy, mainly in solar, some wind.	RSR	EUR	FRANCE
Nexans SA	Cables, for grid power infrastructure.	EEF	EUR	FRANCE
Nibe Industrier AB	Heating & cooling, sustainable technologies, Sweden.	EEF	SEK	SWEDEN
Nio	Electric Vehicles, design, manufacture, premium EVs.	ENS	USD	CHINA
NKT A/S	AC/DC cables, grid infrastructure improvements.	EEF	DKK	DENMARK
Nordex SE	Wind turbines, based in Germany/Europe, worldwide.	RWD	EUR	GERMANY
Novozymes A/S	Biofuels, enzymes used in partnerships, Denmark.	RBB	DKK	DENMARK
Ormat	Geothermal, works too in recovered heat energy.	ROH	USD	US
Orsted A/S	Sustainable wind, also biomass, thermal, Denmark.	RWD	DKK	DENMARK
Piedmont Lithium	Lithium, US-based source for battery-grade lithium.	ENS	USD	US
Plug Power	Small fuel cells, e.g. in forklifts; drop in replacements.	ECV	USD	US
Pod Point	EV Charging, UK, Norway, home and business.	EEF	GBP	UK
Powercell Sweden	Fuel cells, transportation, marine, stationary uses.	ECV	SEK	SWEDEN
Proterra	Electric transit buses, EV charging solutions.	EEF	USD	US
Prysmian SpA	Cables, renewable power transmission, global.	EEF	EUR	ITALY
Quantumscape	Lithium metal batteries, solid state, quicker charge.	ENS	USD	US
ReneSola	Solar, project developer and operator, worldwide.	RSR	USD	CHINA
Renewable Energy Group	Biodiesel, natural fats, oils, grease to biofuels.	RBB	USD	US
Renova	Wind, Solar, Biomass, power generation in Asia.	RWD	JPY	JAPAN
Rivian	Electric trucks and vehicles, fast charging network.	ENS	USD	US
Samsung SDI	Batteries, innovative energy storage, EVs, South Korea.	ENS	KRW	S. KOREA
Scatec ASA	Solar power, develops, owns and operates worldwide.	RSR	NOK	NORWAY
SFC Energy AG	Fuel cells, direct methanol (DMFC) technology.	ECV	EUR	GERMANY
Shoals Technologies	Solar, electric balance of system, wiring, combiners.	RSR	USD	US
Siemens Gamesa	Wind, onshore & offshore, turbines, gearboxes, Spain	RWD	EUR	SPAIN

Signify NV	Lighting, systems increasing efficiency, Netherlands.	EEF	EUR	NETHERLANDS
Sino-American Silicon	Solar, semi-conductor silicon wafer materials, Taiwan.	RSR	TWD	TAIWAN
SK IE Technology	Battery materials, separators and ceramic coated.	ENS	KRW	S. KOREA
SMA Solar Technologies	Inverters for solar, industrial scale storage, Germany.	RSR	EUR	GERMANY
Sociedad Quimica Chile	Lithium, a key element in advanced batteries, Chile.	ENS	USD	CHILE
SolarEdge	Inverters, panel-level solar optimizers, micro-inverters.	RSR	USD	US
Solaria Energia	Solar, renewable power generation, Iberia.	RSR	EUR	SPAIN
SolTech Energy Sweden	Building-integrated solar, also solar leasing in China.	RSR	SEK	SWEDEN
Stem	Smart battery storage, AI energy management.	ENS	USD	US
Sunnova	Residential solar and energy storage installation.	RSR	USD	US
SunPower	Solar, efficient PV panels with rear-contact cells.	RSR	USD	US
Sunrun	Residential solar, leasing, PPA or purchase rooftop PV.	RSR	USD	US
Terna SpA	Transmission of electricity, increasingly is renewables.	EEF	EUR	ITALY
TPI Composites	Wind Blades; also light-weighting for transportation.	RWD	USD	US
United Renewable Energy	Solar, also energy storage, hydrogen and fuel cells.	RSR	TWD	TAIWAN
Universal Display	Organic light emitting diodes, efficient displays.	EEF	USD	US
Verbio Vereinigte BioEn.	Biofuels, manufacturer supplier to Germany, Europe.	RBB	EUR	GERMANY
Verbund AG	Electricity supplier, hydro, a large provider for Austria.	ROH	EUR	AUSTRIA
Vestas Wind Systems	Wind, wind turbine manufacturing & services, Denmark.	RWD	DKK	DENMARK
Wallbox NV	EV charging, can be bidirectional for vehicle to home.	EEF	USD	SPAIN
West Holdings	Solar, Japan-focused residential and commercial PV.	RSR	JPY	JAPAN
Wolfspeed	Electrifying high power systems, SiC, GaN.	EEF	USD	US
Xebec Adsorption	Gases for new renewable energies, hydrogen.	RBB	CAD	CANADA
Xinjiang Goldwind	Wind, large turbine manufacturer, China.	RWD	HKD	CHINA
Xinyi Energy Holdings	Solar Farms, a spin-off from Xinyi solar glass, China.	RSR	HKD	CHINA
Xinyi Solar Holdings	Solar, ultra-clear glass products, China.	RSR	HKD	CHINA
Xpeng Motors	Electric Vehicles, internet and autonomous features.	ENS	USD	CHINA

125 stocks/100 = Individual WEIGHT EACH COMPONENT = 0.800000

0.80000000

13 Additions: 1798.HK, CADLR.OL, ELWS.TA, EKTG.DE, FASTN.AS, LILM, LCID, NEXS.PA, NKT.CO, PODP.L, PTR.A, RIVN, WBX

13 Deletions: CAV1V.HE, FKR.MI, UKWG.L, GRN.TO, GP, HPUR.OL, ALHRS.PA, REE, DSMN.AS, RNW.TO, SUNW, VLTA.PA, WLDN

NEX SECTORS Q1 2022: SECTOR

		<u>#</u>	<u>% Approx. Weight</u>
Energy Conversion	ECV	16	13%
Energy Efficiency	EEF	25	20%
Energy Storage	ENS	22	18%
Renewables - Biofuels &	RBB	6	5%
Renewables - Other	ROH	5	4%
Renewable - Solar	RSR	31	25%
Renewable - Wind	RWD	20	16%
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		125	100%