

Sectors & Stock Weightings: WilderHill Progressive Energy Index (WHPRO) for start of Q4 2013. 55 stocks.

Each stock freely moves according to its share price after the rebalance;
*Banded stocks are those under \$400 million in size and weighted at 0.5%.

Alternative Fuel - 17% Sector Weight (8 stocks @2.12% each)

Andersons, ANDE. Ethanol producer, corn-based; rail group is in fuel transport.
Cameco, CCJ. Uranium fuel, one of largest producers; also does fuel processing.
Chesapeake Energy, CHK. Natural gas, one of larger U.S. independent producers.
Denison Mines, DNN. Uranium fuel, also non-U.S.; decommissions, recycling wastes.
Methanex, MEOH. Methanol, liquid fuel can be derived from fossil fuels or organics.
Range Resources, RRC. Natural gas, produces in Appalachian & Gulf Coast regions.
Rentech, RTK. Syngas & fuels from biomass and waste materials; Gas to Liquids.
Southwestern Energy, SWN. Natural gas, U.S. producer, also midstream services.

Conversion & Storage - 21% Sector weight (11 stocks @1.90% each)

Altra Holdings, AIMC. Mechanical power transmission, electromechanical conversion.
Chart Industries, GTLS. Natural gas, LNG; liquefied gas storage/transport, efficiency.
Chicago Bridge & Iron, CBI. Nat. gas; also better containment for next-gen nuclear.
Clean Energy Fuels, CLNE. Natural gas fleet vehicles, integration and distribution.
Covanta Holding, CVA. Incineration, converts waste to energy (WtE); conglomerate.
Energizer, ENR. Lithium, NiMH, various new battery and charger technologies.
EnerSys, ENS. Battery maker, for telecommunications, utilities, motive power.
Golar LNG, GLNG. LNG, major independent carrier, gas transport, regasification.
MasTec, MTZ. Engineering & construction: distribution of electricity, natural gas.
Wabco, WBC. Mechatronics, better vehicle mechanical/energy/braking controllers.
Westport Innovations, WPRT. Enables vehicles' use of natural gas, gaseous fuels.

Better Efficiency - 20% Sector Weight (10 stocks @1.95% each; +1 *banded stock)

Acuity Brands, AYI. LED lights, OLEDs, and controls for indoor & outdoor lighting.
A.O. Smith, AOS. Energy efficiency innovations for water heating & monitoring.
Apogee, APOG. Advanced glass, for better efficiency, green building designs.
Emerson Electric, EMR. Broad work in energy efficiency, storage, lately biofuels.
Esco Technologies, ESE. Power grid, advances 2-way metering & communications.
General Cable, BGC. Power grid, high voltage transmission cable and wire products
Koninklijke Philips Electronics NV, PHG. Efficient LEDs, advanced industrial lighting.
LSB Industries, LXU. Greater energy efficiency in building end-use, heating, cooling.
Regal Beloit, RBC. Energy efficient motors, in commercial, industrial, homes etc.
**Revolution Lighting*, RVL. LED lights, multi-branded array and sign lighting.
Woodward, WWD. Energy controllers, optimization, industrial turbines in generation.

New Energy Activity - 18% Sector weight (9 stocks @1.88% each; +2 *banded)

Eaton, ETN. Hybrids, better electric and fluid power in truck & auto applications.
Foster Wheeler, FWLT. Infrastructure, engineering services in WtE, LNG, CCS.
**Global Power Equipment*, GLPW. Designs, engineering for gas, hydro, nuclear.
GrafTech, GTI. Graphite, advanced electrodes for power generation, fuel cells.
**Hannon Armstrong*, HASI. Capital: Infrastructure & finance for energy efficiency.
Hexcel, HXL. Lighter composites, advanced structural reinforcement materials.
Johnson Controls, JCI. Building controls, also advanced hybrid vehicle systems.
Owens Corning, OC. Materials lightening, building insulation composite materials.

Rockwood Holdings, ROC. Lithium battery recycling, lithium & cobalt supply.
Siemens AG, SI. Conglomerate, is diversified across energy innovation globally.
Veeco Instruments, VECO. Design, manufactures equipment for LED production.

Emission Reduction - 17% Sector Weight (9 stocks @1.83% each +1 *banded stock)

ADA-ES, ADES. Coal emissions reduction, mercury, NOX, CO2, noxious pollutants.
Corning, GLW. Diverse activity includes emissions reduction, filters, and catalysts.
Luxfer Holdings PLC, LXFR. Advanced materials: reduced emissions, gaseous storage.
McDermott, MDR. Infrastructure: reduces coal emissions, constructs WtE facilities.
Nuverra, NES. Natural gas: recycling water & spill prevention; used oil recycling.
**Peerless*, PMFG. Pollution reduction: effluent separation & filtration systems.
Power Solutions, PSIX. Flex-fuel low-emission engines; nat. gas, biogas, hybrid etc.
Sasol Ltd, SSL. Syngas to synthetic fuel; potential CO2 capture/sequestration (CCS).
Tata Motors, TTM. Smaller & 'nano' vehicles, India-based with worldwide sales.
Tenneco, TEN. Automotive end-of-pipe emissions controls, catalytic converters.

Utility - 7% Sector weight (4 stocks @1.75% each)

Companhia Energetica de Minas Cemig, CIG. Brazilian Utility, large hydroelectric.
Centrais Electricas Brasileiras, EBR. Brazilian Utility, large hydro, also nuclear.
Enersis, S.A., ENI. Chile, Argentina, Peru. Utility, lower-CO2 large hydroelectric.
NRG Yield, NYLD. Contracted power generation and thermal, also some renewables.