

Sectors & Stock Weightings: WilderHill Progressive Energy Index (WHPRO)
for start of Q2 2018. 42 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 - 26% Sector Weight (8 stocks @3.12% each +2 *banded)

Andersons, ANDE. Ethanol producer, corn-based; rail group is in fuel transport.
Chesapeake Energy, CHK. Natural gas, one of larger U.S. independent producers.
**Clean Energy Fuels*, CLNE. Natural gas fuel integration; for use in fleet vehicles.
Cosan, CZZ. Biofuels, Brazil-based using sugarcane feedstock, ethanol exporter.
Green Plains Energy, GPRE. Biofuel, ethanol; using U.S. domestic feedstock.
Methanex, MEOH. Methanol, liquid fuel may be derived from fossil fuels or organics.
**Pacific Ethanol*, PEIX. Biofuels, major U.S. producer of lower-carbon fuels.
Range Resources, RRC. Natural gas, produces in Appalachian & Gulf Coast regions.
Rex American, REX. Biofuels, with subsidiaries is a major U.S. ethanol producer.
Southwestern Energy, SWN. Natural gas, U.S. producer, also midstream services.

Conversion & Storage - 23% Sector weight (9 stocks @2.55% each)

Altra Holdings, AIMC. Mechanical power transmission, electromechanical conversion.
Chart Industries, GTLS. Natural gas, LNG; liquefied gas storage/transport, efficiency.
Covanta Holding, CVA. Incineration, converts waste to energy (WtE); conglomerate.
EnerSys, ENS. Battery maker, for telecommunications, utilities, motive power.
FMC, FMC. Lithium producer for carbonate, metal, expanding hydroxide capacity.
Freeport-McMoRan, FCX. Lithium producer; copper; also battery-grade cobalt JV.
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.

Better Efficiency - 18% Sector Weight (7 stocks @2.57% each)

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.
Regal Beloit, RBC. Energy efficient motors, in commercial, industrial, homes etc.
Woodward, WWD. Energy controllers, optimization, industrial turbines in generation.

Emission Reduction - 13% Sector Weight (4 stocks @2.87% each +3 *banded)

**CECO Environmental*, CECE. End-of-pipe emissions controls and pollution reduction.
Corning, GLW. Diverse, activity includes emissions reduction, filters, and catalysts.
**Kandi Technologies*, KNDI. Developing small gasoline and urban electric vehicles.
**Luxfer Holdings PLC*, LXFR. Advanced material, reduced emissions, gaseous storage.
McDermott, MDR. Natural Gas; fewer emissions/CO2 vs. coal; EPCI in LNG facilities.
Tata Motors, TTM. Smaller & 'nano' vehicles, India-based with worldwide sales.
Tenneco, TEN. Automotive end-of-pipe emissions controls, catalytic converters.

New Energy Activity - 10% Sector weight (4 stocks @2.37% each +1 *banded stock).

Eaton, ETN. Hybrids, better electric and fluid power in truck & auto applications.
**Hudson*, HDSN. Refrigerant HFCs reclamation; reduces potent greenhouse gases.
Heritage Crystal Clean, HCCI. Oil re-refining, modern waste reuse and recycling.

Lydall, LDL. Thermal and filtration separation; innovative energy efficiency.

Owens Corning, OC. Materials lightening, building insulation composite materials.

Utility - 10% Sector weight (4 stocks @2.50% each)

Avangrid, AGR. Electricity & Natural Gas, generation, storage, distribution.

Companhia Energetica de Minas Cemig, CIG. Brazil Utility, large hydroelectric.

Hannon Armstrong, HASI. Energy efficiency, capital & finance for infrastructure.

NRG Yield, NYLD. Contracted power generation and thermal, also some renewables.