

| <b><u>Wind Energy WNX - component</u></b> | <b><u>Theme</u></b>                             | <b><u>Sector</u></b> | <b><u>Activity</u></b> |
|---|---|----------------------|------------------------|
| 5E Advanced Materials                     | Boron, can be used in wind blades, motors.      | WM                   | USA                    |
| Abb Ltd.                                  | Wind turbines, generators and converters.       | WM                   | SWITZER.               |
| Acciona                                   | Sustainability infrastructure, engineering.     | SG                   | SPAIN                  |
| Aker Horizons                             | Sustainable energy includes wind, hydrogen.     | WI                   | NORWAY                 |
| Arcadis NV                                | Engineering, EPC, develops wind projects.       | WI                   | NETHER.                |
| Boralex Inc                               | Development and operation of wind farms.        | WF                   | CANADA                 |
| Brookfield Renewable Corp.                | Pure plays renewables wind, hydro, solar.       | WF                   | USA                    |
| Bumhan Fuel Cell                          | Offshore cable systems, grid. S. Korea.         | WM                   | S. KOREA               |
| China Datang Corp Renewable Power         | Among largest listed wind operators in China.   | WF                   | CHINA                  |
| China High Speed Transmission             | Wind turbine gearboxes, heavy duty.             | WM                   | CHINA                  |
| Corporacion Acciona Energias Ren.         | Wind, global energy exclusively renewables.     | WI                   | SPAIN                  |
| CS Bearing                                | Bearings, slewing rings used in wind turbines.  | WM                   | S. KOREA               |
| CS Wind                                   | Wind power, both onshore, and also offshore.    | WF                   | S. KOREA               |
| Dongkuk Structures                        | Wind tower steel structures.                    | WM                   | S. KOREA               |
| EDP Renovaveis SA                         | Wind, among the world's largest generators.     | WI                   | PORTUGAL               |
| Elia Group SA                             | High voltage power transmission, Europe/UK.     | SG                   | BELGIUM                |
| Encavis AG                                | Wind energy plants across Europe, solar too.    | WF                   | GERMANY                |
| Energiekontor AG                          | Wind Farm Developer, and group ownership.       | WF                   | GERMANY                |
| Energy Vault                              | Energy storage, re-purposing old wind blades.   | WI                   | USA                    |
| Enlight Renewable Energy Ltd              | Builds and operates wind, also solar sites.     | WF                   | ISRAEL                 |
| FREYR                                     | Wind used for new green battery manufacture.    | SG                   | NORWAY                 |
| Fugro NV                                  | Marine geoconsulting, subsea offshore wind.     | WI                   | NETHER.                |
| Greenvolt Energias                        | Wind, residual biomass & urban demo waste.      | WF                   | PORTUGAL               |
| Grenergy Renovables SA                    | Wind projects in Chile, Peru, elsewhere.        | WF                   | SPAIN                  |
| Innergex Renewable Energy Inc             | Independent renewable producer, wind.           | WF                   | CANADA                 |
| JL Mag Rare Earth                         | Rare Earths, in wind turbines, EVs, fuel cells. | WI                   | CHINA                  |
| Navitas Semiconductor                     | Inverters, power efficiency, newer GaN vs SiC.  | SG                   | USA                    |
| Neoen SA                                  | Wind, a lead French independent producer.       | WF                   | FRANCE                 |
| Nexans SA                                 | Subsea cables for offshore wind farms.          | SG                   | FRANCE                 |
| NKT A/S                                   | High voltage DC offshore wind, cables.          | SG                   | DENMARK                |
| Nordex SE                                 | One of world's largest wind turbine makers.     | WI                   | GERMANY                |
| Orsted A/S                                | Renewable energy - transitioned from fossils.   | WI                   | DENMARK                |

|                                  |  |    |          |
|----------------------------------|--|----|----------|
| OX2 AB                           | Wind power generation, Europe.                   | WF | SWEDEN   |
| PNE AG                           | Wind in Power to X, including direct green H2.   | WI | GERMANY  |
| Prysmian SpA                     | Cables for new offshore wind and grid.           | SG | ITALY    |
| Renew Energy Global              | Utility scale wind farms, India.                 | WF | INDIA    |
| Renova Inc                       | Independent renewable power producer.            | WF | JAPAN    |
| SBM Offshore NV                  | Offshore wind energy installations, wave too.    | WF | NETHER.  |
| Schneider Electric               | Advanced grid, wind energy management.           | SG | FRANCE   |
| SGL Carbon SE                    | Composite and graphite materials in wind.        | WM | GERMANY  |
| SKF AB                           | Wind gear rolling bearings, seals, mechatronics. | WM | SWEDEN   |
| SMA Solar Technology             | Wind power conversion; green H2 from wind.       | SG | GERMANY  |
| Stem                             | Software, optimizes wind + battery + grid.       | SG | USA      |
| Subsea 7 SA                      | Offshore wind installations, also Seaway 7.      | WI | UK       |
| TECO Electric & Machinery        | Turbines for wind energy, and EV motors.         | WM | TAIWAN   |
| Terna Rete                       | Europe's largest independent grid operator.      | SG | ITALY    |
| Toray Industries                 | Carbon fiber for wind turbine blades.            | WI | JAPAN    |
| TPI Composites Inc               | Wind blade manufacturer, assemblies.             | WM | USA      |
| Unison Co Ltd                    | Wind turbine manufacturing, S Korea.             | WM | S. KOREA |
| Vestas Wind Systems A/S          | One of first, largest, wind turbine makers.      | WI | DENMARK  |
| Xinjiang Goldwind Science & Tech | Wind turbine maker onshore & offshore, China.    | WM | CHINA    |

51 components = 100/51 = 1.96078% Weight each

#### **WNX For Latter Q3 2022 - 51 Components**

8 Deletes: Infrastructure & Energy, Siemens Gamesa, Azure, Cadeler, Fastned, Gurit, Hexagon Comp., Voltaia

11 Adds: 5E Advanced, Arcadis, Bumhan, CS Bearing, Fugro, Navitas, PNE AG, SBM, Stem, Subsea 7, TECO

#### **4 WilderHill Wind Index Sectors**

|                            | <b>#</b>  |
|----------------------------|-----------|
| SMARTER GRID (SG)          | 11        |
| WIND FARMS (WF)            | 15        |
| WIND INNOVATION (WI)       | 13        |
| <u>WIND MATERIALS (WM)</u> | <u>12</u> |
| Total =                    | 51        |