

<u>Name</u>	<u>Theme</u>	<u>Sector</u>	<u>Activity</u>
Acciona	Sustainability infrastructure, engineering.	SG	SPAIN
Aker Horizons ASA	Offshore and floating wind, green H2, grid.	WI	NORWAY
Alfen NV	Smart power grid, energy storage systems.	SG	NETHER.
Arcadis NV	Engineering, EPC, develops wind projects.	WI	NETHER.
Atkore	Conduit, cables, electrification assemblies.	SG	USA
Belden	Wind cables, turbine data communications.	WM	USA
Boralex Inc	Development and operation of wind farms.	WF	CANADA
Brookfield Renewable Corp.	Pure plays renewables wind, hydro, solar.	WF	USA
China Datang Corp Renewable	Among largest listed wind operators in China.	WF	CHINA
Corporacion Acciona Energias	Wind, global energy exclusively renewables.	WI	SPAIN
CS Wind	Wind power, both onshore, and also offshore.	WF	S. KOREA
Daihen	Transformers, power distribution, inverters.	SG	JAPAN
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
Energix Renewable	Wind, solar, independent power producer.	WF	ISRAEL
Enlight Renewable En.	Builds and operates wind, also solar sites.	WF	ISRAEL
ERG SpA	Wind, going from fossils to clean renewables.	WF	ITALY
Fluence	Energy storage, on intermittent wind in grid.	SG	USA
Fugro NV	Marine geoconsulting, subsea offshore wind.	WI	NETHER.
Greenvolt Energias	Wind, residual biomass & urban demo waste.	WF	PORTUGAL
Hubbell	Electrical gear, modernizes grid, utilities.	SG	USA
Hydro One	Electricity transmission, distribution, Ontario.	SG	CANADA
IMCD NV	Wind lubricants, 100% recycled blade foam.	WM	NETHER.
Infineon Tech AG	Converters and inverters, wind power systems.	WM	GERMANY
Innergex Renewable En.	Independent renewable producer, wind.	WF	CANADA
Landis&Gyr	Smart Grid management, advanced meters.	WM	SWITZER.
LEM Holding	Power measurement, transducers, wind, grid.	WI	CHINA
Littelfuse	Wind controls, sensors, circuit protection.	WM	USA
LS Electric	Offshore wind power, transformers & grid.	WI	S. KOREA
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
Prysmian SpA	Cables for new offshore wind and grid.	SG	ITALY
Quantumscape	Solid state batteries, lithium, grid storage.	SG	USA
Renova Inc	Independent renewable power producer.	WF	JAPAN
Rexel SA	Smart electrical systems, energy efficiency.	WM	FRANCE
SBM Offshore NV	Offshore wind energy installations, wave too.	WF	NETHER.
Scatec ASA	Wind farm, new 5 GW, green H2, ammonia.	WF	NORWAY
Schneider Electric	Advanced grid, wind energy management.	SG	FRANCE
Shihlin Electric	Heavy transformers for grid, EV charging.	WI	TAIWAN
SKF AB	Wind gear rolling bearings, mechatronics.	WM	SWEDEN
SMA Solar Technology	Wind power conversion; green H2 from wind.	SG	GERMANY
Spie SA	Energy infrastructure sustainability, Europe.	SG	FRANCE
Stem	Software, optimizes wind + battery + grid.	SG	USA
Subsea 7 SA	Offshore wind installations, also Seaway 7.	WI	UK
Sumitomo Electric	Power cables for offshore wind, grid, SiC.	WM	JAPAN
Ta Ya Electric Wire	Power cables, wires, magnetic wires, grid.	SG	TAIWAN
Takaoka Toko	Wind power use on the grid, transformers.	SG	JAPAN
TE Connectivity	On+Offshore wind connectivity, sensors.	WM	SWITZER.
TECO Electric & Mach,	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
Toyo Tanso	Graphite, nanotubes, in wind, H2 storage.	WM	JAPAN
TPI Composites Inc	Wind blade manufacturer, assemblies.	WM	USA
Vestas Wind Systems	One of first, largest, wind turbine makers.	WI	DENMARK
WESCO International	Utility electric for grid, assists renewables.	WM	USA
Wolfspeed	Silicon Carbide SiC in wind, better efficiency.	WI	USA

1 Deletion for Latter Q4 2023: SGL

4 Additions for Latter Q4 2023: Aker, Atkore, Daihen, Ta Ya

61 components = $100/61 = 1.6393\%$ Weight each

<u>4 WilderHill Wind (WNX) Sectors</u>	<u>#</u>
SMARTER GRID (SG)	19
WIND FARMS (WF)	15
WIND INNOVATION (WI)	14
<u>WIND MATERIALS (WM)</u>	<u>13</u>
Total =	61