

<u>Name</u>	<u>Description</u>	<u>Sector</u>	<u>Activity</u>
Acciona	Sustainability infrastructure, engineering.	SG	SPAIN
Alfen NV	Smart power grid, energy storage systems.	SG	NETHER.
Allis Electric	Transformers in grid, switchgear, inverters.	SG	TAIWAN
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
Cadeler A/S	Offshore wind construction, maintenance.	WF	DENMARK
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
DEME Group NV	Offshore wind infrastructure, undersea cable.	WI	BELGIUM
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
Energiekontor AG	Wind farms developer and operator, solar too.	WF	GERMANY
Energix Renewable	Wind, solar, independent power producer.	WF	ISRAEL
Enlight Renewable Energy Ltd	Builds and operates wind, also solar sites.	WF	ISRAEL
Eos Energy	Zinc batteries, safer alternative to Li-ion.	SG	USA
ERG SpA	Wind, going from fossils to clean renewables.	WF	ITALY
Fluence	Energy storage, using intermittent wind in grid.	SG	USA
Fortune Electric	Wind power transmission, grid transformers.	WI	TAIWAN
Fujikura	Power cables, overhead transmission lines.	WM	JAPAN
Furukawa Electric	Cable connectors, electrical conductors.	WM	JAPAN
Grenergy Renovables	Wind, development, construction, operation.	WF	SPAIN
HD Hyundai Electric	Power transformers, circuit breakers for grid.	WM	S. KOREA
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
JL Mag Rare Earth	Rare Earths, NdFeB permanent magnets, China.	WM	CHINA
Landis&Gyr	Smart Grid management, advanced meters.	WM	SWITZER.
LEM Holding	Power measurement, transducers, wind, grid.	WI	CHINA
LG Energy Solution	Batteries, ESS for strenghtening the grid.	SG	S. KOREA
Littelfuse	Wind controls, sensors, circuit protection.	WM	USA
LS Electric	Offshore wind power, transformers & grid.	WI	S. KOREA
Meridian Energy Ltd	Wind, hydropower, Utility in New Zealand.	WF	NEW ZEALAND
Mersen SA	Carbon brushes in wind power, & graphite.	WM	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
Prysmian SpA	Cables for new offshore wind and grid.	SG	ITALY
Quantumscape	Solid state batteries, lithium, grid storage.	SG	USA
Renew Energy Global	Utility scale wind in India, also green H2.	WF	INDIA
Renova Inc	Independent renewable power producer.	WF	JAPAN
Rexel SA	Smart electrical systems, energy efficiency.	WM	FRANCE
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
Sinbon Electronics	Heavy duty wind connectors, cables, grid.	WM	TAIWAN
SKF AB	Wind gear rolling bearing, seals, mechatronics.	WM	SWEDEN
SMA Solar Technology	Wind power conversion; green H2 from wind.	SG	GERMANY
Spie SA	Energy infrastructure sustainability, Europe.	SG	FRANCE
SSAB AB	Green steel development, in wind towers.	WM	SWEDEN
Sumitomo Electric	Power cables for offshore wind, grid, SiC.	WM	JAPAN
Ta Ya Electric Wire	Power cables, wires, magnetic wires, grid.	SG	TAIWAN
Taihan Electric Wire	Submarine cables wind, solar; high voltage.	WI	S. KOREA
TECO Electric & Machinery	Turbines for wind energy, and EV motors.	WM	TAIWAN
Terna Rete	Europe's largest independent grid operator.	SG	ITALY
Timken	Engineered bearings, friction management.	WI	USA
Tocalo Co. Ltd.	Advanced surface coatings in wind, lubricity.	WI	JAPAN
Toray Industries	Carbon fiber for wind turbine blades.	WI	JAPAN
Toyo Tanso	Graphite, nanotubes, in wind, H2 storage.	WM	JAPAN
Vaisala Oyj	Weather intelligence, wind forecasting.	WI	FINLAND
Valmont	Strengthening grid, for more wind & solar.	SG	USA
Vestas Wind Systems A/S	One of first, largest, wind turbine makers.	WI	DENMARK
Voltronic Power	Power converters, inverters, energy storage.	WM	TAIWAN
Wasion Holdings	Advanced metering, energy distribution.	SG	CHINA
WESCO International	Utility electric for grid, assists renewables.	WM	USA
Willdan Group	Engineering, grid optimization, efficiency EPC.	SG	USA

Rebalance for Latter Q3 2025:

Deletion: Wolfspeed

Addition: JL Mag

71 components = 1.40845% Equal Weight each

4 WilderHill Wind (WNX) Sectors

SMARTER GRID (SG)

WIND FARMS (WF)

#

22

13

WIND INNOVATION (WI)	17
<u>WIND MATERIALS (WM)</u>	<u>19</u>
Total =	71