

Equity	Energy Renaissance Theme		
GE		\$	1.00
Hannon Armstrong (HASI)		\$	0.50
Casella Waste (CWST)		\$	0.25
Exxon (XOM)		\$	1.00
Kinder Morgan Inc (KMI)		\$	0.50
Semgroup (SEMG)		\$	0.50
Spectra (SE)		\$	0.50
Cheniere (LNG)		\$	0.25
Approach Resources (AREX)		\$	0.50
Haliburton (HAL)		\$	0.50
China Gas (384 HK, non-US)		\$	0.50
American Water Works (AWK)		\$	0.50
IHS (IHS)		\$	0.50
CREE INC (CREE)		\$	0.50
Lyondell Basell (LYB)		\$	0.25
Dupont (DD)		\$	0.25
Worley Parsons (WOR.AU, non-US)		\$	0.25
[Sunedison (SUNE)]			
[Solar City (STCY)]			
[Tesla (TSLA)]			
<b>Equity Sub Total</b>		\$	<b>8.25</b>
<b>Commodities/OTC</b>	Brent Crude 13mo Twin Win	\$	2.00
	OTC Short Brent Option*	\$	1.00
	2yr WTI Call *	\$	1.00
	Short AUD (hedge)*	\$	0.25
<b>Energy Renaissance Sub Total</b>		\$	<b>12.50</b>

