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Deloitte Australia CleanTech Index
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Executive summary

Welcome to the Deloitte Australia CleanTech (DACT) Index Quarterly Performance Report for 31 March 2023.

The Deloitte Australia CleanTech (DACT) Index is a quarterly review of cleantech stocks listed in Australia and was launched in 2008. It is compiled from publicly available information provided by the Australian Securities Exchange (ASX). The DACT Index is based on the market capitalisation weighted share price performance of listed companies that operate across a number of defined sub-sectors. The impact of dividends and capital returns are excluded from the Index, which currently comprises 86 companies.

During the first quarter of 2023, financial markets were impacted by further increases to interest rates and sentiment regarding a potential global recession following large scale bank collapses such as Silicon Valley Bank. However, during this period the ASX200 still had positive growth of 2.0% following the 8.7% growth last quarter. The DACT Index also increased in value by 6.6% compared to the previous quarter's decrease of 5.6%. This was primarily driven by an improvement in performance in the Water sub-index.

The 12 month performance of the DACT remained negative, with a 12.8% decrease since Q3 2022, falling behind the ASX200 which shows a 4.3% decrease in the last 12 months.

The DACT has experienced a 55.2% growth over the past three years and 32.9% growth over the past five years. In comparison, the ASX200 has experienced a 41.4% rise over the last three-year and 31.9% five-year growth.

The DACT Index combined market capitalisation of 86 stocks (after rebalancing) for this quarter is \$82.4

billion compared to \$80.0 billion last quarter.

To provide an analysis of the DACT Index, a number of sub-indices have been developed. The Water sub-index was the strongest performing comparatively, recording a 22.0% growth over the last quarter. The strongest performer in Water sector was Reece, a wholesale imports and distribution company, of plumbing and bathroom supplies.

Following a decline in value from the previous quarter, Q3 2023 saw a rise in the DACT index's value, including an increase in the DACT compared to the ASX200. It is anticipated that the importance and momentum for meeting low and zero carbon ambitions will continue to drive long term favourable results for the companies embracing and providing low carbon solutions.



John O'Brien

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The CleanTech sector in Australia

Stocks with both environmental and economic benefits

Cleantech subsectors



Solar
Solar thermal, traditional photovoltaics, concentrating photovoltaics, nanotechnologies



Biogas Generation
Biomass digester gas, landfill gas, biosyngas, waste-to-energy



Smart Grid & Energy Efficiency
Demand response, grid management, energy efficiency, smart homes, VPPs, V2G and IoT



Wind
Onshore, offshore, urban, turbines, developers, tower and blade manufacturers, community wind farms



Energy Storage & Fuel Cells
Energy storage systems, batteries, pumped hydro, fuel cell technologies



Green Buildings
Green building design, precinct design, products and services, rating systems and building management



Biofuel
Corn ethanol, sugar ethanol, cellulosic ethanol, biodiesel, algae production, biotech providers, Sustainable Aviation Fuels



Vehicle Technologies
Hybrid, plug-in hybrid, flex fuel, hydrogen and electric vehicles, recharging and refuelling infrastructure



Biomaterials
Organically based materials and plastics, energy materials and green chemistry



Wave, Tidal, Hydro
Surface and submerges wave technologies, tidal, major and mini-hydro, pumped storage schemes



Water
Utility management, treatment technologies, desalination, water reuse, sensor technologies, water efficiency



Carbon Trading
Environmental offsets, carbon farming, soil management, livestock management and carbon trading



Sustainable Minerals
Sustainable mining, urban mining and recycling of minerals for renewable energy and battery storage technologies



Waste Management Recycling
Residential and industrial waste collection and disposal, recycling and reuse operations



Environmental Service Providers
Environmental engineering, specialist service and equipment providers

The cleantech sector is split into a number of sub-sectors, detailed above. Each of the sub-sectors contains technologies and solutions with both environmental and economic benefits.

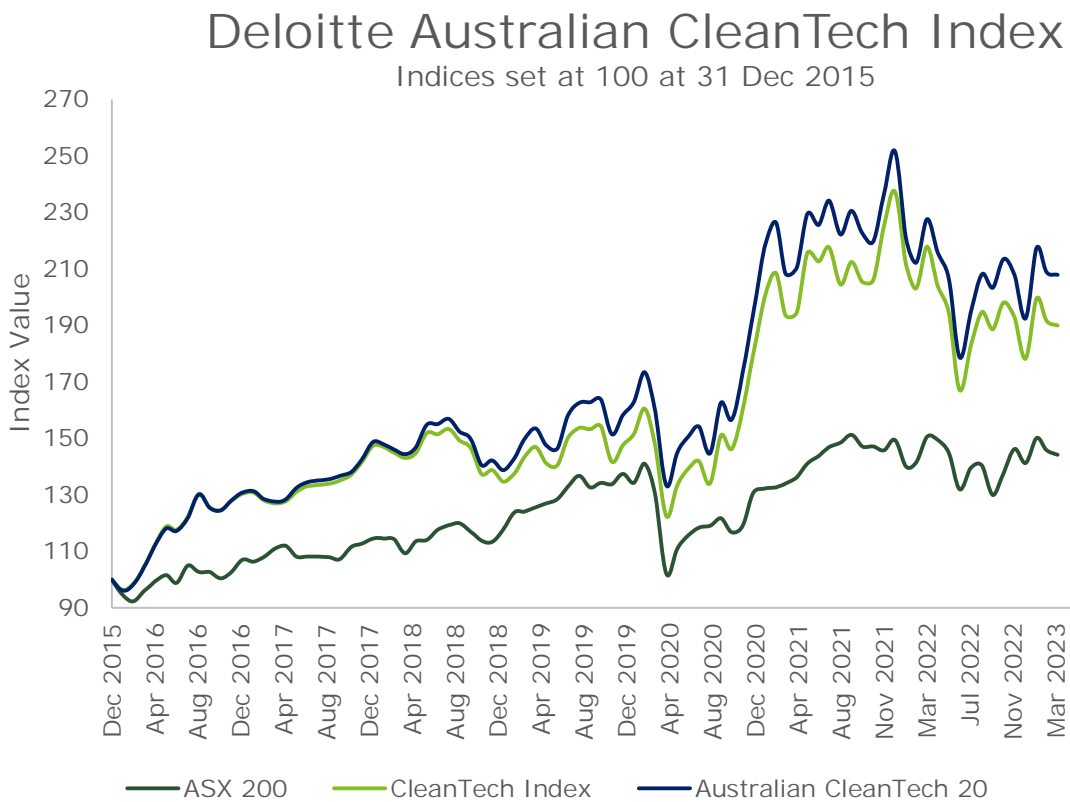
The cleantech sector is fundamentally different to Socially Responsible Investments (SRI) or Environmental, Social and Governance (ESG) performance. SRI and ESG look at incremental improvements in company performance and can be seen as 'operational hygiene' measures that find the best in class. Cleantech focuses on companies whose output positively enhances the communities and ecologies in which they reside. It is about doing 'more good' rather than 'less bad'.

There are currently 86 companies falling under the coverage of the Index, with a delisting of New Energy Solar since the previous report. The index combined market capitalisation, after rebalancing, of \$82.4 billion presents a comprehensive picture of the Australian cleantech sector in a single measure. To provide a focus on the performance of the larger, more liquid stocks, we also track the performance of the largest twenty companies by market capitalisation. The composition of the DACT20 is rebalanced every quarter and highlights any differences between the smaller and larger stocks.

Market wrap – 31 March 2023

The performance of the DACT Index over the March 2023 quarter is detailed below.

% Change	Last Quarter	12 Months	3 Years	5 Years
ASX200	2.0%	(4.3%)	41.4%	31.9%
DACT Index	6.6%	(12.8%)	55.2%	32.9%
DACT20	8.1%	(8.7%)	56.1%	44.0%



Positive contributions to the DACT Index

Over the last quarter, only 30 of the 86 companies positively contributed to the DACT Index. The top positive contributors to the Index during this quarter were Reece, Mercury NZ and Pilbara Minerals Limited.

Reece Limited's activities include wholesale, import and distribution of plumbing and bathroom supplies. Its large contributions to the DACT for the quarter follows strong contributions from the previous quarter.

Mercury NZ Limited (ASX: MCY) is an electricity company in New Zealand. Mercury invest in, develop and produce electricity from only renewable energy sources. It operates nine Hydro stations on the Waikato River, five Geothermal power stations in the Central North Island and three wind farms across the country.

Pilbara Minerals Limited (ASX: PLS) is a lithium and tantalum producer. The company's primary project is the Pilgangoora project located in the Pilbara region of Western Australia, with a 2 million tonne per annum mining and processing operation.

The companies that recorded the largest percentage share price increases for the period up to 31 March 2023 were:

- Energy Action 203.8%
- Bluglass 130.8%
- Aeris Environmental 46.4%

Table 1: Largest positive contributions to the DACT Index in the March 2023 quarter

Company	Change in Market Cap Contribution (\$m)
Reece	2067
Mercury NZ	1214
Pilbara Minerals Limited	570
Reliance Worldwide Corp	564
Sims Metal Management	455
Piedmont Lithium Ltd	442
Allkem Limited	408
Nanosonics	242

Source: Deloitte analysis, ASX, Capital IQ

Table 2: Largest share price increases in the March 2023 quarter

Company	Share Price Performance
Energy Action	203.8%
Bluglass	130.8%
Aeris Environmental	46.4%
Australian Vanadium	44.0%
Piedmont Lithium Ltd	38.0%
Mpower Group Ltd	31.3%
RedFlow	27.9%
Reliance Worldwide Corp	24.3%

Source: Deloitte analysis, ASX, Capital IQ

Negative contributions to the DACT Index

The largest negative contribution on a market capitalisation basis to the DACT Index for the March 2023 quarter came from Cleanaway Waste.

Cleanaway Waste (ASX:CWY) is an Australian waste management company operating in over 250 locations in Australia. The drop in contribution was driven by a labour shortage for the period which has impacted the company's net profits.¹

Table 3: Largest negative contributions to the DACT Index in the March 2023 quarter

Company	Change in Market Cap Contribution (\$m)
Cleanaway Waste	(557)
Jervois Mining	(435)
Ioneer	(189)
5E Advanced Materials	(167)
Syrah Resources	(151)
Magnis Resources	(112)
Neometals	(111)
Australian Ethical Investment	(100)

Source: Deloitte analysis, ASX, Capital IQ

The companies that recorded the largest percentage share price decreases for the March 2023 quarter were Jervois Mining and SECOS Group.

Jervois Mining is an Australian mining company, specialising in supply of cobalt and nickel. Jervois Mining has reportedly been impacted by falling cobalt prices and U.S. inflation on construction costs.²

Table 4: Largest share price decreases in the March 2023 quarter

Company	Share Price Performance
Jervois Mining	(76.0%)
SECOS Group	(49.6%)
Cobalt Blue Holdings	(37.1%)
Volt Resources	(33.3%)
5E Advanced Materials	(32.2%)
Magnis Resources	(31.1%)
Graphex Mining	(30.8%)
Papyrus Australia	(30.6%)

Source: Deloitte analysis, ASX, Capital IQ



¹ Simon Evans, Australian Financial Review, Managers become garbos as Cleanaway tries to fill 670 jobs. (See [Link](#))

² Bryce Crocker, Jervois, Jervois suspends final construction at Idaho Cobalt Operations. (See [Link](#))

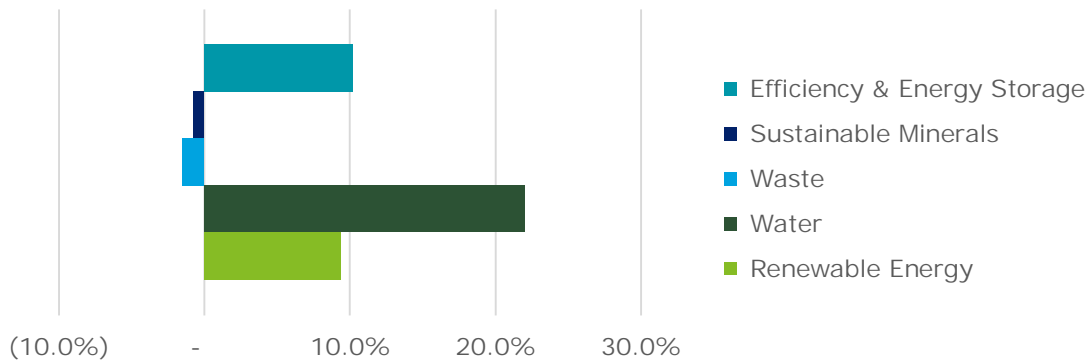
Sub-indices performance

To allow a more granular analysis of the DACT Index, a number of sub-indices have been developed. The performance of these sub-indices over the last five financial years and during Q3 of FY2023 is shown in the table and charts below.

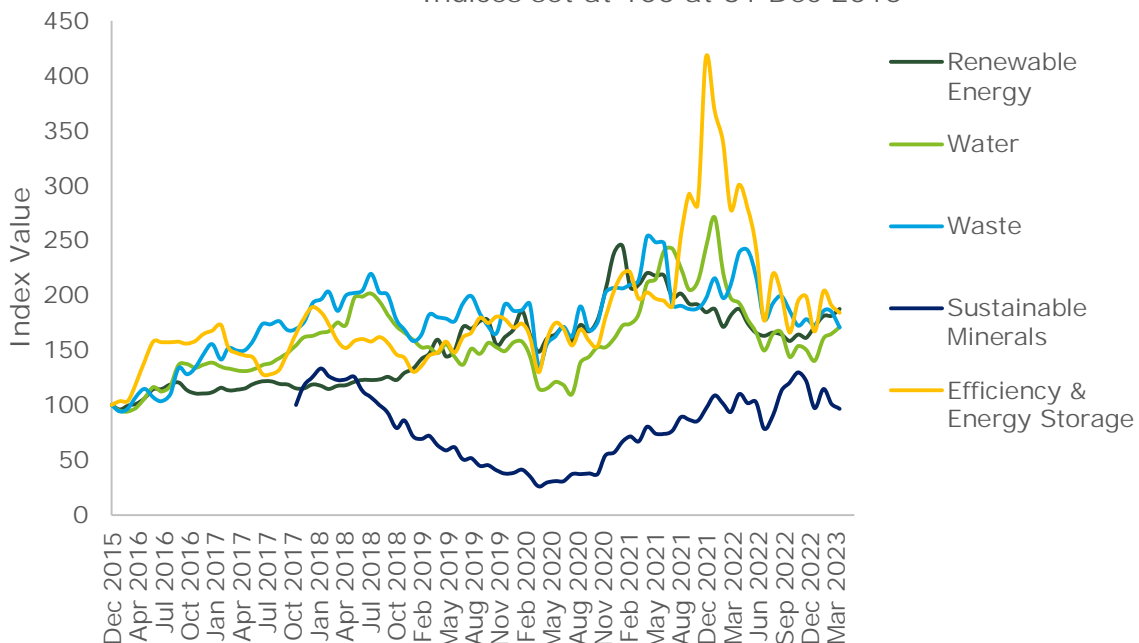
The performance of the DACT Index over the March 2023 quarter is detailed below.

% Change	Last Quarter	12 Months	3 Years	5 Years
Renewable Energy	9.4%	(0.0%)	26.5%	59.8%
Water	22.0%	(11.3%)	48.2%	(2.3%)
Waste	(1.5%)	(28.6%)	25.8%	(8.2%)
Sustainable Minerals	(0.7%)	(12.2%)	274.8%	(21.3%)
Efficiency & Energy Storage	10.2%	(38.9%)	41.7%	16.1%
Other	(13.1%)	(46.9%)	54.8%	(16.4%)

Deloitte Australian CleanTech Index
Sub-Indices Performance Q3 FY2023



Deloitte Australian CleanTech Index
Indices set at 100 at 31 Dec 2015



DACT20 Index

DACT20 Component Companies on 31 March 2023

The 20 largest Index constituents by market capitalisation on 31 March 2023 are provided in the table below. These companies will form the constituents of the DACT20 until the Index is rebalanced again on 30 June 2023.

Each of the constituents in the DACT20 has a market capitalisation of more than \$330m with an average market capitalisation of \$3.93 billion.

Market Cap Ranking	Company	Ticker
1	Meridian Energy	MEZ
2	Pilbara Minerals Limited	PLS
3	Reece	REH
4	Mercury NZ	MCY
5	Allkem Limited	AKE
6	Contact Energy	CEN
7	Cleanaway Waste	CWY
8	Sims Metal Management	SGM
9	Reliance Worldwide Corp	RWC
10	Piedmont Lithium Ltd	PLL
11	Nanosonics	NAN
12	Syrah Resources	SYR
13	Calix	CXL
14	Novonix	NVX
15	Ioneer	INR
16	Renascor Resources Ltd	RNU
17	Beacon Lighting Corp	BLX
18	5E Advanced Materials	5EA
19	Australian Ethical Investment	AEF
20	Neometals	NMT

Companies included in the DACT Index as at 31 March 2023

Rank	Code	Company	Subsector	Share Price	Share Price	Mkt Cap	Mkt Cap*	Quarterly	Quarterly
				Dec-22	Mar-23	Dec-22	Mar-23	Market Cap Change	Share Price Performance
				\$	\$	(\$m)	(\$m)	(\$m)	(%)
1	MEZ	Meridian Energy	Renewable Energy	5.02	4.99	13,525.3	13,444.5	(80.8)	(0.6%)
2	PLS	Pilbara Minerals Limited	Sustainable Minerals	3.75	3.94	11,242.4	11,812.0	569.6	5.1%
3	REH	Reece	Water	14.15	17.35	9,140.7	11,207.8	2,067.1	22.6%
4	MCY	Mercury NZ	Renewable Energy	5.14	5.95	7,706.2	8,920.6	1,214.4	15.8%
5	AKE	Allkem Limited	Sustainable Minerals	11.24	11.88	7,165.8	7,573.8	408.0	5.7%
6	CEN	Contact Energy	Renewable Energy	7.25	7.29	6,038.9	6,072.2	33.3	0.6%
7	CWY	Cleanaway Waste	Waste	2.63	2.38	5,854.4	5,297.9	(556.5)	(9.5%)
8	SGM	Sims Metal Management	Waste	13.09	15.51	2,460.7	2,915.7	454.9	18.5%
9	RWC	Reliance Worldwide Corp	Water	2.96	3.68	2,319.7	2,883.9	564.2	24.3%
10	PLL	Piedmont Lithium Ltd	Sustainable Minerals	0.645	0.89	1,164.7	1,607.1	442.4	38.0%
11	NAN	Nanosonics	Efficiency & Energy Storage	4.29	5.09	1,295.7	1,537.3	241.6	18.6%
12	SYR	Syrah Resources	Sustainable Minerals	2.06	1.835	1,381.4	1,230.5	(150.9)	(10.9%)
13	CXL	Calix	Efficiency & Energy Storage	4.47	4.74	806.6	855.3	48.7	6.0%
14	NVX	Novonix	Efficiency & Energy Storage	1.47	1.265	715.6	615.8	(99.8)	(13.9%)
15	INR	Ioneer	Sustainable Minerals	0.38	0.29	797.4	608.5	(188.9)	(23.7%)
16	RNU	Renascor Resources Ltd	Sustainable Minerals	0.215	0.235	542.0	592.4	50.4	9.3%
17	BLX	Beacon Lighting Corp	Efficiency & Energy Storage	2.13	1.72	475.7	384.1	(91.6)	(19.2%)
18	5EA	5E Advanced Materials	Sustainable Minerals	1.18	0.8	517.9	351.1	(166.8)	(32.2%)
19	AEF	Australian Ethical Investment	Others	3.89	3	438.7	338.3	(100.4)	(22.9%)
20	NMT	Neometals	Sustainable Minerals	0.8	0.6	442.2	331.6	(110.5)	(25.0%)
21	MNS	Magnis Resources	Sustainable Minerals	0.37	0.255	359.0	247.4	(111.6)	(31.1%)

- Note: Market Capitalisation has been rebalanced to account for changes in shares on issue, mergers, acquisitions and any other inorganic market capitalisation changes

Companies included in the DACT Index as at 31 March 2023

Rank	Code	Company	Subsector	Share Price	Share Price	Mkt Cap	Mkt Cap*	Quarterly	Quarterly
				Dec-22	Mar-23	Dec-22	Mar-23	Market Cap Change	Share Price Performance
				\$	\$	(\$m)	(\$m)	(\$m)	(%)
22	GNX	Genex Power	Renewable Energy	0.135	0.165	187.0	28.6	41.6	22.2%
23	LPI	Lithium Power International	Sustainable Minerals	0.44	0.35	276.8	220.2	(56.6)	(20.5%)
24	D2O	Duxton Water	Water	1.62	1.79	190.6	210.6	20.0	10.5%
25	SRL	Sunrise Energy Metals	Renewable Energy	1.92	1.89	172.9	170.2	(2.7)	(1.6%)
26	LIS	LiS-Energy	Efficiency & Energy Storage	0.32	0.255	204.9	163.3	(41.6)	(20.3%)
27	AVL	Australian Vanadium	Sustainable Minerals	0.025	0.036	108.6	156.4	47.8	44.0%
28	JRV	Jervois Mining	Sustainable Minerals	0.275	0.066	571.8	137.2	(434.6)	(76.0%)
29	COB	Cobalt Blue Holdings	Sustainable Minerals	0.58	0.365	214.6	135.1	(79.6)	(37.1%)
30	BKT	Black Rock Mining	Sustainable Minerals	0.135	0.135	132.7	132.7	-	-
31	FLC	Fluence Corp	Water	0.165	0.19	107.3	123.6	16.3	15.2%
32	EVS	EnviroSuite	Others	0.13	0.092	163.8	115.9	(47.9)	(29.2%)
33	RWL	Rubicon Water	Water	0.875	0.66	150.4	113.4	(37.0)	(24.6%)
34	VMT	Vmoto	Others	0.395	0.35	112.0	99.2	(12.8)	(11.4%)
35	HZR	Hazer Group	Efficiency & Energy Storage	0.57	0.495	97.2	84.4	(12.8)	(13.2%)
36	BLG	Bluglass	Efficiency & Energy Storage	0.026	0.06	34.8	80.4	45.5	130.8%
37	EGR	EcoGraf Limited	Sustainable Minerals	0.22	0.175	99.1	78.8	(20.3)	(20.5%)
38	GAP	Gale Pacific	Efficiency & Energy Storage	0.2850	0.285	78.8	78.8	-	-
39	RFT	Rectifier Technologies	Efficiency & Energy Storage	0.041	0.05	56.4	68.8	12.4	22.0%
40	TMT	Technology Metals Australia	Sustainable Minerals	0.35	0.32	73.4	67.1	(6.3)	(8.6%)
41	EGL	Environmental Group	Others	0.21	0.2	67.8	64.5	(3.2)	(4.8%)
42	PPG	Pro-Pac Packaging	Efficiency & Energy Storage	0.33	0.335	62.4	63.4	0.9	1.5%
43	SDV	SciDev	Waste	0.375	0.315	71.2	59.8	(11.4)	(16.0%)

* Note: Market Capitalisation has been rebalanced to account for changes in shares on issue, mergers, acquisitions and any other inorganic market capitalisation changes

Companies included in the DACT Index as at 31 March 2023

Rank	Code	Company	Subsector	Share Price	Share Price	Mkt Cap	Mkt Cap*	Quarterly	Quarterly
				Dec-22	Mar-23	Dec-22	Mar-23	Market Cap Change	Share Price Performance
				\$	\$	(\$m)	(\$m)	(\$m)	(%)
44	RFX	RedFlow	Efficiency & Energy Storage	0.215	0.275	38.6	49.4	10.8	27.9%
45	FGR	First Graphite	Sustainable Minerals	0.1125	0.084	65.4	48.8	(16.6)	(25.3%)
46	TON	Triton Minerals	Sustainable Minerals	0.036	0.03	49.8	41.5	(8.3)	(16.7%)
47	LIT	Lithium Australia	Sustainable Minerals	0.045	0.033	55.0	40.3	(14.7)	(26.7%)
48	CPV	Clearvue Technologies	Renewable Energy	0.18	0.18	39.1	39.1	-	-
49	VRC	Volt Resources	Sustainable Minerals	0.015	0.01	58.2	38.8	(19.4)	(33.3%)
50	SPN	Sparc Technologies	Sustainable Minerals	0.495	0.45	42.2	38.4	(3.8)	(9.1%)
51	MPP	Metro Performance Glass	Efficiency & Energy Storage	0.18	0.195	32.3	34.9	2.7	8.3%
52	SFG	Seafarms Group	Others	0.008	0.0065	38.9	31.6	(7.3)	(18.8%)
53	SES	SECOS Group	Efficiency & Energy Storage	0.12	0.058	61.6	31.1	(30.5)	(49.6%)
54	DEM	De.Mem	Water	0.115	0.125	28.1	30.6	2.4	8.7%
55	PET	Phoslock Environmental Technologies	Water	0.036	0.042	22.5	26.2	3.7	16.7%
56	GW1	Greenwing Resources Ltd	Sustainable Minerals	0.275	0.205	34.7	25.9	(8.8)	(25.5%)
57	WOA	Wide Open Agriculture	Others	0.19	0.18	27.1	25.7	(1.4)	(5.3%)
58	LER	Leaf Energy	Others	0.02	0.014	36.2	25.3	(10.9)	(30.0%)
59	PWN	Parkway Minerals NL	Water	0.01	0.011	22.1	24.3	2.2	10.0%
60	PV1	Provaris Energy	Renewable Energy	0.046	0.044	25.2	24.1	(1.1)	(4.3%)
61	CCE	Carnegie Clean Energy	Renewable Energy	0.002	0.0015	31.3	23.5	(7.8)	(25.0%)
62	ETR	Entyr Limited	Waste	0.016	0.019	19.4	23.0	3.6	18.8%
63	RNE	ReNu Energy	Renewable Energy	0.05	0.051	22.0	22.4	0.4	2.0%
64	BUD	Buddy Platform	Efficiency & Energy Storage	0.006	0.006	21.1	21.1	-	-
65	EVG	Evion Group NL	Sustainable Minerals	0.071	0.067	20.1	19.0	(1.1)	(5.6%)

* Note: Market Capitalisation has been rebalanced to account for changes in shares on issue, mergers, acquisitions and any other inorganic market capitalisation changes

Companies included in the DACT Index as at 31 March 2023

Rank	Code	Company	Subsector	Share Price Dec-22 \$	Share Price Mar-23 \$	Mkt Cap Dec-22 (\$m)	Mkt Cap* Mar-23 (\$m)	Quarterly Market Cap Change (\$m)	Quarterly Share Price Performance (%)
66	KPO	Kalina Power	Renewable Energy	0.015	0.012	22.7	18.2	(4.5)	(20.0%)
67	CG1	Carbonxt	Others	0.072	0.064	19.8	17.6	(2.2)	(11.1%)
68	OEC	Orbital Corporation	Others	0.18	0.155	18.8	16.2	(2.6)	(13.9%)
69	VPR	Volt Power Group	Efficiency & Energy Storage	0.002	0.0015	21.4	16.1	(5.4)	(25.0%)
70	PPY	Papyrus Australia	Waste	0.049	0.034	23.0	16.0	(7.0)	(30.6%)
71	EDE	Eden Innovations	Efficiency & Energy Storage	0.005	0.005	13.6	13.6	-	-
72	14D	1414 Degrees	Efficiency & Energy Storage	0.076	0.065	15.4	13.1	(2.2)	(14.5%)
73	MVL	Graphex Mining	Sustainable Minerals	0.026	0.018	18.3	12.7	(5.6)	(30.8%)
74	BAT	Battery Minerals	Sustainable Minerals	0.004	0.004	11.7	11.7	-	-
75	EPX	EP&T Global Limited	Efficiency & Energy Storage	0.025	0.026	10.7	11.1	0.4	4.0%
76	AEI	Aeris Environmental	Others	0.028	0.041	6.9	10.1	3.2	46.4%
77	TTI	Traffic Technologies	Efficiency & Energy Storage	0.016	0.012	11.6	8.7	(2.9)	(25.0%)
78	NC6	Nanollose	Waste	0.051	0.0485	7.6	7.2	(0.4)	(4.9%)
79	PO3	Purifloh Ltd	Water	0.295	0.22	9.3	6.9	(2.4)	(25.4%)
80	EAX	Energy Action	Efficiency & Energy Storage	0.079	0.24	2.1	6.5	4.3	203.8%
81	MPR	Mpower Group Ltd	Renewable Energy	0.016	0.021	4.7	6.2	1.5	31.3%
82	RAN	Range International	Waste	0.006	0.006	5.6	5.6	-	-
83	SIS	Simble Sense	Efficiency & Energy Storage	0.013	0.012	5.8	5.4	(0.4)	(7.7%)
84	POW	Protean Wave Energy	Renewable Energy	0.008	0.008	5.2	5.2	-	-
85	CL8	Carly Holdings Limited	Others	0.022	0.025	4.5	5.1	0.6	13.6%
86	RGI	Roto-Gro International	Others	0.22	0.22	4.3	4.3	-	-

* Note: Market Capitalisation has been rebalanced to account for changes in shares on issue, mergers, acquisitions and any other inorganic market capitalisation changes

Compilation of the DACT Index

Compilation of the DACT Index

The quarterly DACT Index is compiled from publicly available information provided by the ASX on the share prices and market capitalisation of each cleantech listed company.

A company is included on the DACT Index if the majority of its revenues are from a recognised cleantech sub-sector.

The information on cleantech listed companies is extracted to provide a market capitalisation weighted share price index for all cleantech companies, broadly in line with the methodology adopted for the compilation of the ASX 200 Index. The impact of dividends and capital returns has been excluded from the DACT Index.

The base period of the DACT Index is 31 December 2015, and for the purposes of the Index this month is given a notional value of 100. If a company has been delisted during a particular period, no data will be included for that month and all subsequent months until the company is relisted. Historical information regarding the company will continue to be included in the calculation of the DACT index.

The positive and negative contributions to the DACT Index are determined on the basis of a company's size by market capitalisation relative to the total size of the index and its share price performance from the time the firm was added to the DACT Index.

About Deloitte's Climate & Sustainability Team

As one of Australia's leading professional services firms, Deloitte Touche Tohmatsu and its affiliates provide audit, tax, consulting and financial advisory services through approximately 14,000 people across the country.

The Deloitte Climate & Sustainability team has the experience and expertise to help the energy industry face the challenges of today and tomorrow. We have a diverse team of experts from a wide range of backgrounds, including industry, finance, regulators and government.

We know the market and understand the future trends to help clients across every sector to navigate the immense disruption to the economy that is only just starting. Our diverse range of services include strategy, forecasting, planning, financial and energy market modelling, innovation, workforce transformation, decarbonisation planning and physical risk assessments.

Disclaimer of liability

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