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Deloitte Australia CleanTech Index
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Brought to you by:

John O'Brien
Partner | Financial Advisory
CleanTech Specialist
Tel: +61 419 826 372
e-mail: johnobrien@deloitte.com.au

Executive summary

Welcome to the Deloitte Australia CleanTech (DACT) Index Quarterly Performance Report for 30 September 2021.

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.

As the Covid-19 outbreak continues to spiral, the Australian share market dropped towards the end of this quarter. However, the quarterly performance of the ASX200 grew by 0.3% compared to 3.1% last quarter. Meanwhile, the DACT Index fell by 5.6% compared to its growth of 11.8% last quarter. This was primarily driven by falls in Water, Renewable Energy and Waste sub-indices. Each of which had high ranking constituents experience share prices drops for the quarter. For example, Reece the 2nd ranked market cap company in the DACT index had a share price fall of 19%.

The 12 month performance of the DACT remained strong, with an impressive 40.5% gain on the previous year. Meanwhile, the ASX200 expanded by 26.1% from this time last year. This demonstrates the continued resilience of the cleantech sector over the long-term.

The DACT has experienced a 40.1% growth over the past three years and 63.7% growth over the past five years. In comparison, the ASX200 has experienced a 25.8% three-year growth and 43.4% five-

year growth.

To provide an analysis of the DACT Index, a number of sub-indices have been developed.

The Efficiency & Energy Storage sub-index was the strongest performing sub-index recording an impressive 50.1% growth over the last quarter, followed by the Sustainable Minerals sub-index with a 17.8% improvement.

The DACT Index combined market capitalisation of 86 stocks is \$80.2 billion compared to \$84.4 billion last quarter.

This demonstrates a comprehensive and positive picture of the Australian cleantech sector backed by a strong long-term performance.



John O'Brien

Partner | Financial Advisory
Energy Transition & Decarbonisation

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, peer-to-peer trading, energy efficiency, home automation, 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



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 and recycling of minerals for renewable energy and battery storage technologies



Waste Management Recycling

Residential and industrial waste collection and disposal, recycling 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'.

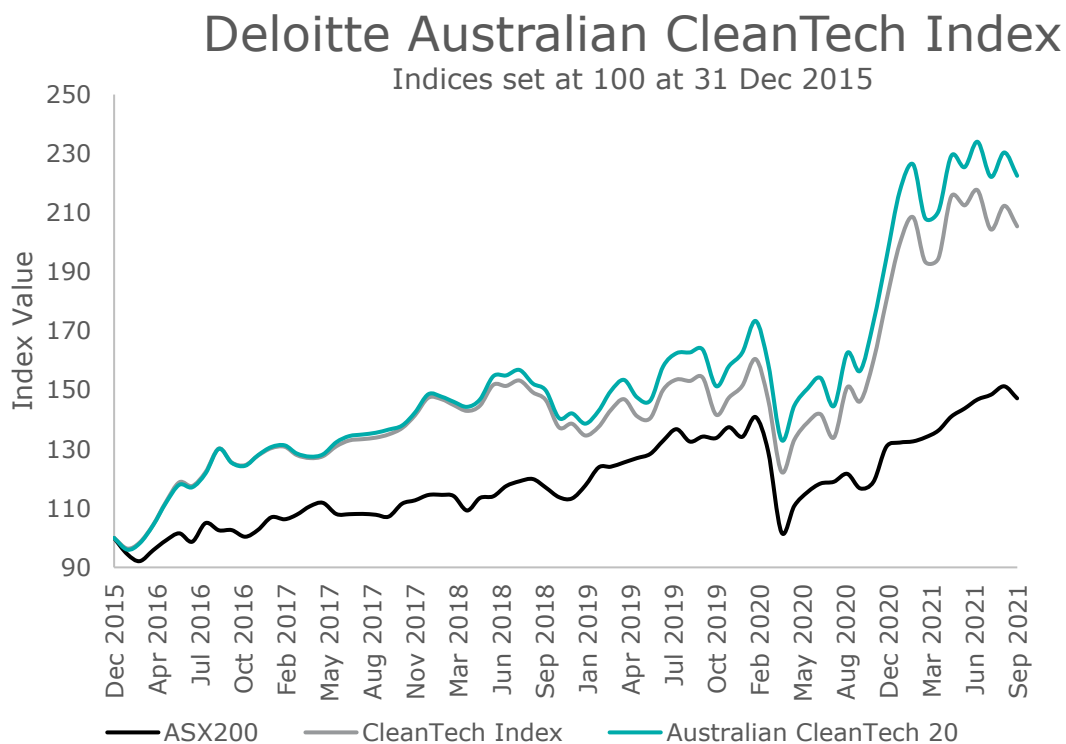
There are currently 86 companies falling under the coverage of the Index: Rubicon Water (RWL) was added to the list, whilst Integrated Energy Solutions (IGE), Tilt Renewables (TLT), Actinogen Medical Limited (ACW) and Galaxy Resources Limited (GZY) are no longer part of the index. Galaxy Resources Limited merged with Orocobre (ORE) on 26 August 2021, Actinogen Medical Limited no longer performs clean tech activities, and Integrated Energy Solutions and Tilt Renewables are no longer listed on the ASX. It is noted that the name of Bass Metals has been changed to Greenwing Resources Limited. The index combined market capitalisation after rebalancing of \$82.7 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 – 30 September 2021

The performance of the DACT Index over the September 2021 quarter is detailed below.

% Change	Last Quarter	12 Months	3 Years	5 Years
ASX200	0.3%	26.1%	25.8%	43.4%
DACT Index*	(5.6%)	40.5%	40.1%	63.7%
DACT20	(4.9%)	42.2%	48.5%	77.5%



*This index calculation methodology has been slightly amended for this edition, which has caused a small restating of earlier results.

Positive contributions to the DACT Index

Over the last quarter, only 45 of the 86 companies positively contributed to the DACT Index. The top three positive contributors to the Index during this quarter were Novonix, Pilbara Minerals Limited and Greenwing Resources Limited (formerly Bass Metals).

Novonix (ASX: NVX) is a lithium-ion battery company. Explored further in the focus company case study (on page 6).

Pilbara Minerals Limited (ASX: PLS) is a lithium and tantalum producer, that has operations focused on the Pilgangoora project. This project is a lithium and tantalum mining and processing operation near Port Hedland in the Pilbara region of WA.

Greenwing Resources Limited (ASX:GW1) is an Australian metals and mining company. Its main business segment is in graphite mining, with some exposure to lithium.

The companies that recorded the largest percentage share price increases for the three months to 30 September 2021 were:

- Novonix 199.6%
- Papyrus Australia 131.8%
- Sparc Technologies 127.8%

Table 1: Largest positive contributions to the DACT Index in the September 2021 quarter

Company	Change in Market Cap Contribution (\$m)
Novonix	1792
Pilbara Minerals Limited	1739
Greenwing Resources Ltd	1425
Orocobre	764
Pioneer	531
Calix	404
Australian Ethical Investment	294
Cleanaway Waste	247

Source: Deloitte analysis, ASX, Capital IQ

Table 2: Largest share price increases in the September 2021 quarter

Company	Share Price Performance
Novonix	199.6%
Papyrus Australia	131.8%
Sparc Technologies	127.8%
Renascor Resources Ltd	98.5%
Calix	95.5%
EnviroSuite	88.9%
Carbonxt	80.8%
Ioneer	80.0%

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 September 2021 quarter came from Reece.

Reece (ASX: REH) is a distributor of plumbing, bathroom, heating, ventilation, waterworks, air conditioning and refrigeration products in Australia, New Zealand and the US. Reece Limited activities include wholesale, imports, distribution,

marketing and retail.

Reece's loss in share price of and market capitalisation followed the announcement of the company's FY21 financial results.

The companies that recorded the largest percentage share price decreases for the 2021 September quarter were Buddy Platform and First Graphite.

Table 3: Largest negative contributions to the DACT Index in the September 2021 quarter

Company	Change in Market Cap Contribution (\$m)
Reece	(2894)
Sims Metal Management	(658)
Meridian Energy	(635)
Piedmont Lithium Ltd	(465)
Mercury NZ	(328)
Buddy Platform	(72)
Jervois Mining	(68)
Reliance Worldwide Corp	(63)

Source: Deloitte analysis, ASX, Capital IQ

Table 4: Largest share price decreases in the September 2021 quarter

Company	Share Price Performance
Buddy Platform	(55.8%)
First Graphite	(37.9%)
Pearl Global	(34.7%)
Clearvue Technologies	(31.8%)
Piedmont Lithium Ltd	(28.8%)
Roto-Gro International	(27.5%)
Leaf Energy	(27.3%)
Mpower Group Ltd	(23.8%)

Source: Deloitte analysis, ASX, Capital IQ



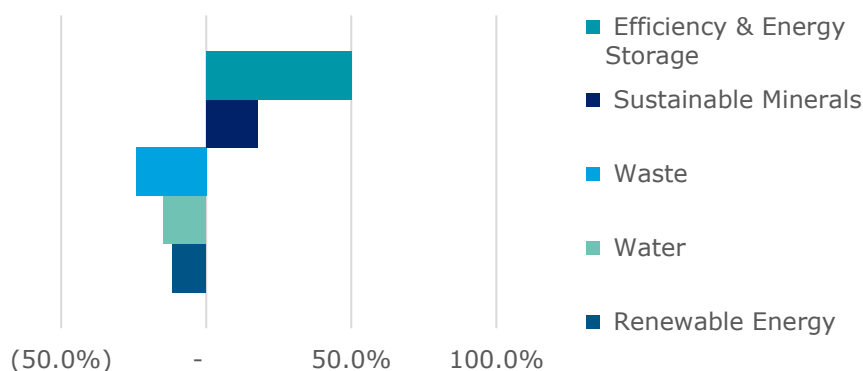
Sub-indices performance

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 1Q of FY2022 is shown in the table and charts below.

The performance of the DACT Index over the September 2021 quarter is detailed below.

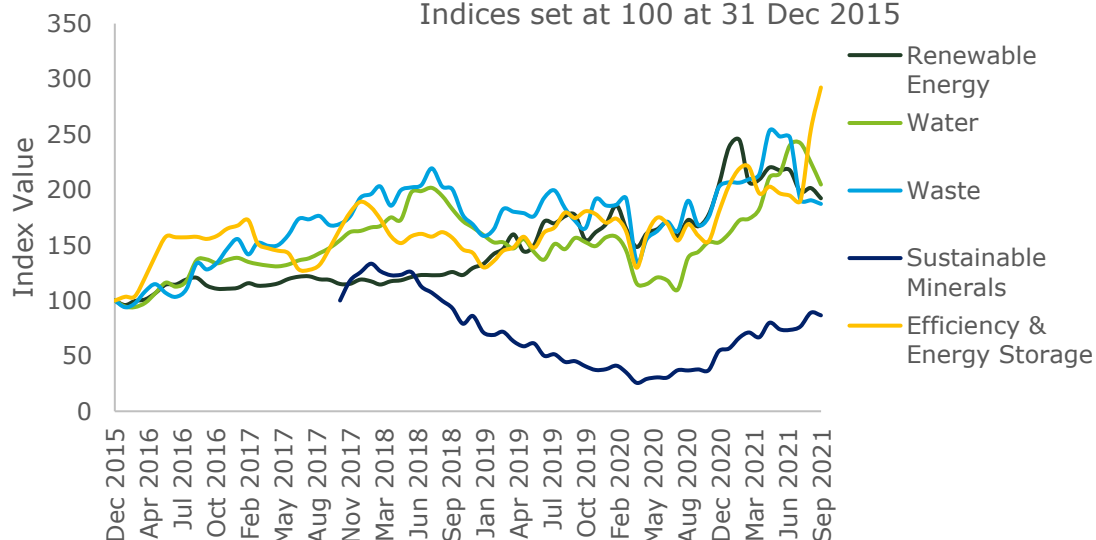
% Change	Last Quarter	12 Months	3 Years	5 Years
Renewable Energy	(11.6%)	15.1%	53.0%	69.6%
Water	(14.8%)	42.3%	12.2%	49.3%
Waste	(24.2%)	11.3%	(6.6%)	46.2%
Sustainable Minerals	17.8%	128.7%	(6.9%)	N/A
Efficiency & Energy Storage	50.1%	84.2%	86.5%	87.7%

Deloitte Australian CleanTech Index
Sub-Indices Performance 2Q FY2022



Deloitte Australian CleanTech Index

Indices set at 100 at 31 Dec 2015



DACT20 Index

DACT20 Component Companies on 30 September 2021

The 20 largest Index constituents by market capitalisation on 30 September 2021 are provided in the table below. These companies will form the constituents of the DACT20 until the Index is rebalanced again on 31 December 2021.

Each of the constituents in the DACT20 has a market capitalisation of more than \$450m with an average market capitalisation of \$3.7 billion.

Market Cap Ranking	Company	Ticker
1	Meridian Energy	MEZ
2	Reece	REH
3	Mercury NZ	MCY
4	Contact Energy	CEN
5	Pilbara Minerals Limited	PLS
6	Cleanaway Waste	CWY
7	Reliance Worldwide Corp	RWC
8	Orocobre	ORE
9	Novonix	NVX
10	Sims Metal Management	SGM
11	Nanosonics	NAN
12	Greenwing Resources Ltd	GW1
13	Australian Ethical Investment	AEF
14	Ioneer	INR
15	Piedmont Lithium Ltd	PLL
16	Calix	CXL
17	American Pacific Borates Ltd	ABR
18	Syrah Resources	SYR
19	Beacon Lighting Corp	BLX
20	Neometals	NMT

Companies included in the DACT Index as at 30 September 2021

Rank Sep-21	Code	Company	Subsector	Share Price June-21 \$	Share Price Sep-21 \$	Mkt Cap June-21 (\$m)	Mkt Cap* Sep-21 (\$m)	Quarterly Market Cap Change (\$m)	Quarterly Share Price Performance (%)
1	MEZ	Meridian Energy	Renewable Energy	4.95	4.72	13,656.1	13,021.5	(634.5)	(4.6%)
2	REH	Reece	Water	23.61	19.13	15,251.7	12,357.7	(2,894.0)	(19.0%)
3	MCY	Mercury NZ	Renewable Energy	6.38	6.15	9,086.5	8,759.0	(327.6)	(3.6%)
4	CEN	Contact Energy	Renewable Energy	7.79	7.91	6,426.3	6,525.3	99.0	1.5%
5	PLS	Pilbara Minerals Limited	Sustainable Minerals	1.45	2.05	4,203.5	5,942.9	1,739.4	41.4%
6	CWY	Cleanaway Waste	Waste	2.64	2.76	5,436.9	5,684.0	247.1	4.5%
7	RWC	Reliance Worldwide Corp	Water	5.26	5.18	4,119.5	4,056.9	(62.7)	(1.5%)
8	ORE	Orocobre	Sustainable Minerals	6.47	8.69	2,226.7	2,990.7	764.0	34.3%
9	NVX	Novonix	Efficiency & Energy Storage	2.22	6.65	898.2	2,690.6	1,792.4	199.5%
10	SGM	Sims Metal Management	Waste	16.6	13.33	3,340.0	2,682.1	(657.9)	(19.7%)
11	NAN	Nanosonics	Efficiency & Energy Storage	5.87	6.31	1,769.6	1,902.2	132.6	7.5%
12	GW1	Greenwing Resources Ltd	Sustainable Minerals	0.005	0.33	21.9	1,447.0	1,425.1	6,500.0%
13	AEF	Australian Ethical Investment	Others	8.44	11.06	948.5	1,243.0	294.5	31.0%
14	INR	Ioneer	Sustainable Minerals	0.35	0.63	663.8	1,194.9	531.1	80.0%
15	PLL	Piedmont Lithium Ltd	Sustainable Minerals	1.025	0.73	1,614.0	1,149.5	(464.5)	(28.8%)
16	CXL	Calix	Efficiency & Energy Storage	2.67	5.22	423.3	827.6	404.3	95.5%
17	ABR	American Pacific Borates Ltd	Sustainable Minerals	1.14	1.48	433.0	562.2	129.2	29.8%
18	SYR	Syrah Resources	Sustainable Minerals	1.035	1.065	515.6	530.6	14.9	2.9%
19	BLX	Beacon Lighting Corp	Efficiency & Energy Storage	1.9	2.14	424.3	477.9	53.6	12.6%
20	NMT	Neometals	Sustainable Minerals	0.48	0.855	261.8	466.3	204.5	78.1%
21	JRV	Jervois Mining	Sustainable Minerals	0.575	0.49	461.5	393.3	(68.2)	(14.8%)
22	EGR	EcoGraf Limited	Sustainable Minerals	0.57	0.705	256.4	317.1	60.7	23.7%

* 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 30 September 2021

Rank Sep-21	Code	Company	Subsector	Share Price June-21 \$	Share Price Sep-21 \$	Mkt Cap June-21 (\$m)	Mkt Cap* Sep-21 (\$m)	Quarterly Market Cap Change (\$m)	Quarterly Share Price Performance (%)
23	NEW	New Energy Solar	Renewable Energy	0.835	0.8	298.4	285.9	(12.5)	(4.2%)
24	MNS	Magnis Resources	Sustainable Minerals	0.26	0.31	221.4	263.9	42.6	19.2%
25	RNU	Renascor Resources Ltd	Sustainable Minerals	0.068	0.135	127.8	253.6	125.9	98.5%
26	GNX	Genex Power	Renewable Energy	0.22	0.235	235.4	251.4	16.0	6.8%
27	EVS	EnviroSuite	Others	0.09	0.17	101.0	190.8	89.8	88.9%
28	D2O	Duxton Water	Water	1.42	1.435	170.2	172.0	1.8	1.1%
29	PPG	Pro-Pac Packaging	Efficiency & Energy Storage	0.2	0.2	162.2	162.2	-	-
30	BKT	Black Rock Mining	Sustainable Minerals	0.14	0.19	118.7	161.1	42.4	35.7%
31	SES	SECOS Group	Efficiency & Energy Storage	0.255	0.295	136.7	158.1	21.4	15.7%
32	PET	Phoslock Environmental Technologies	Water	0.245	0.245	153.1	153.1	-	-
33	SFG	Seafarms Group	Others	0.064	0.06	155.0	145.4	(9.7)	(6.3%)
34	SRL	Sunrise Energy Metals	Renewable Energy	1.79	1.59	159.9	142.0	(17.9)	(11.2%)
35	HZR	Hazer Group	Efficiency & Energy Storage	0.86	0.935	125.0	135.9	10.9	8.7%
36	LER	Leaf Energy	Others	0.11	0.08	179.1	130.2	(48.8)	(27.3%)
37	SDV	SciDev	Waste	0.85	0.8	134.6	126.7	(7.9)	(5.9%)
38	VMT	Vmoto	Others	0.3400	0.41	94.7	114.2	19.5	20.6%
39	FLC	Fluence Corp	Water	0.19	0.18	118.7	112.5	(6.2)	(5.3%)
40	LIT	Lithium Australia	Sustainable Minerals	0.1	0.12	90.7	108.8	18.1	20.0%
41	GAP	Gale Pacific	Efficiency & Energy Storage	0.41	0.375	112.9	103.3	(9.6)	(8.5%)
42	LPI	Lithium Power International	Sustainable Minerals	0.185	0.325	55.7	97.9	42.2	75.7%
43	FGR	First Graphite	Sustainable Minerals	0.29	0.18	156.6	97.2	(59.4)	(37.9%)
44	COB	Cobalt Blue Holdings	Sustainable Minerals	0.27	0.325	74.1	89.2	15.1	20.4%

* 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 30 September 2021

Rank Sep-21	Code	Company	Subsector	Share Price June-21 \$	Share Price Sep-21 \$	Mkt Cap June-21 (\$m)	Mkt Cap* Sep-21 (\$m)	Quarterly Market Cap Change (\$m)	Quarterly Share Price Performance (%)
45	QTM	Quantum Energy	Renewable Energy	0.053	0.077	59.8	86.9	27.1	45.3%
46	MPP	Metro Performance Glass	Efficiency & Energy Storage	0.4	0.42	82.5	86.6	4.1	5.0%
47	VRC	Volt Resources	Sustainable Minerals	0.035	0.034	83.3	80.9	(2.4)	(2.9%)
48	WOA	Wide Open Agriculture	Others	0.8	0.7	86.1	75.3	(10.8)	(12.5%)
49	RFX	RedFlow	Efficiency & Energy Storage	0.058	0.0595	70.8	72.7	1.8	2.6%
50	AVL	Australian Vanadium	Sustainable Minerals	0.019	0.023	55.7	67.4	11.7	21.1%
51	DEM	De.Mem	Water	0.3	0.3	65.0	65.0	-	-
52	CPV	Clearvue Technologies	Renewable Energy	0.44	0.3	92.4	63.0	(29.4)	(31.8%)
53	TMT	Technology Metals Australia	Sustainable Minerals	0.30	0.4	45.1	60.1	15.0	33.3%
54	BUD	Buddy Platform	Efficiency & Energy Storage	0.043	0.019	129.0	57.0	(72.0)	(55.8%)
55	HRL	HRL Holdings	Renewable Energy	0.115	0.115	56.8	56.8	-	-
56	PO3	Purifloh Ltd	Water	1.52	1.63	47.9	51.4	3.5	7.2%
57	OEC	Orbital Corporation	Others	0.83	0.65	64.5	50.5	(14.0)	(21.7%)
58	CCE	Carnegie Clean Energy	Renewable Energy	0.002	0.003	29.4	44.1	14.7	50.0%
59	EDE	Eden Innovations	Efficiency & Energy Storage	0.024	0.021	50.0	43.7	(6.2)	(12.5%)
60	SPN	Sparc Technologies	Sustainable Minerals	0.27	0.615	19.0	43.3	24.3	127.8%
61	RFT	Rectifier Technologies	Efficiency & Energy Storage	0.028	0.031	38.5	42.6	4.1	10.7%
62	TON	Triton Minerals	Sustainable Minerals	0.032	0.037	36.3	42.0	5.7	15.6%
63	EGL	Environmental Group	Others	0.085	0.14	23.5	38.8	15.2	64.7%
64	CG1	Carbonxt	Others	0.13	0.235	21.1	38.2	17.1	80.8%
65	MVL	Graphex Mining	Sustainable Minerals	0.052	0.071	26.4	36.1	9.7	36.5%
66	KPO	Kalina Power	Renewable Energy	0.031	0.03	35.5	34.3	(1.1)	(3.2%)

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Companies included in the DACT Index as at 30 September 2021

Rank Sep-21	Code	Company	Subsector	Share Price June-21 \$	Share Price Sep-21 \$	Mkt Cap June-21 (\$m)	Mkt Cap* Sep-21 (\$m)	Quarterly Market Cap Change (\$m)	Quarterly Share Price Performance (%)
67	AEI	Aeris Environmental	Others	0.15	0.14	36.6	34.1	(2.4)	(6.7%)
68	BAT	Battery Minerals	Sustainable Minerals	0.016	0.014	33.6	29.4	(4.2)	(12.5%)
69	VPR	Volt Power Group	Efficiency & Energy Storage	0.003	0.003	28.0	28.0	-	-
70	BEM	BlackEarth Minerals	Sustainable Minerals	0.094	0.125	20.6	27.4	6.8	33.0%
71	BLG	Bluglass	Efficiency & Energy Storage	0.03	0.034	23.7	26.8	3.2	13.3%
72	PWN	Parkway Minerals NL	Water	0.012	0.012	26.8	26.8	-	-
73	PPY	Papyrus Australia	Waste	0.022	0.051	9.4	21.8	12.4	131.8%
74	14D	1414 Degrees	Efficiency & Energy Storage	0.095	0.1	19.0	20.0	1.0	5.3%
75	TTI	Traffic Technologies	Efficiency & Energy Storage	0.04	0.035	19.3	16.9	(2.4)	(12.5%)
76	MPR	Mpower Group Ltd	Renewable Energy	0.08	0.061	17.5	13.3	(4.2)	(23.8%)
77	NC6	Nanollose	Waste	0.09	0.089	13.4	13.2	(0.1)	(1.1%)
78	PG1	Pearl Global	Waste	0.049	0.032	18.2	11.9	(6.3)	(34.7%)
79	EAX	Energy Action	Efficiency & Energy Storage	0.265	0.32	7.2	8.6	1.5	20.8%
80	RGI	Roto-Gro International	Others	0.04	0.029	11.2	8.1	(3.1)	(27.5%)
81	SIS	Simble Sense	Efficiency & Energy Storage	0.032	0.025	8.8	6.9	(1.9)	(21.9%)
82	POW	Protean Wave Energy	Renewable Energy	0.01	0.01	6.5	6.5	-	-
83	RNE	ReNu Energy	Renewable Energy	0.056	0.048	7.4	6.4	(1.1)	(14.3%)
84	CL8	Carly Holdings Limited	Others	0.064	0.058	7.0	6.3	(0.7)	(9.4%)
85	RAN	Range International	Waste	0.013	0.012	5.9	5.4	(0.5)	(7.7%)
86	RWL	Rubicon Water	Water	-	1.75	-	300.8	New Inclusion	New Inclusion

* 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 Energy Team

As one of Australia's leading professional services firms, Deloitte Touché Tohmatsu and its affiliates provide audit, tax, consulting and financial advisory services through approximately 9,000 people across the country.

Deloitte's Energy & Climate Advisory 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 networks, retailers, regulators and government.

We know the market, and have helped many energy sector participants, new entrants, investors, large consumers and governments with a diverse range of solutions, including strategy, forecasting, planning and both financial and energy market modelling.

Disclaimer of liability

This Index has been prepared as general information only and does not consider the specific objectives, situation or needs of anyone including any member of its target audience. You should not rely on the information in the DACT Index or disclose it or refer to it in any document.

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For more information regarding the Deloitte Australia CleanTech Index, please contact:

John O'Brien

Partner, Energy Transition & Decarbonisation
Financial Advisory

Tel: +61 419 826 372

e-mail: johnobrien@deloitte.com.au

Contact us

Please feel free to contact any of the following to discuss how we can achieve your Energy Transition goals:



John O'Brien
Partner, Energy Transition
Financial Advisory
T: 0419 826 372
E: johnobrien@deloitte.com.au



Sandra James
Partner, Energy Transition
Financial Advisory
T: 0408 799 360
E: sanjames@deloitte.com.au



Matt Judkins
Partner, Energy Transition
Financial Advisory
T: 0424 173 550
E: mjudkins@deloitte.com.au



Georgine Roodenrys
Partner, Energy Transition
Financial Advisory
T: 0407 944 738
E: groodenrys@deloitte.com.au



William Rayward-Smith
Partner, Energy Transition
Financial Advisory
T: 0427 548 813
E: wrayward-smith@deloitte.com.au



Chris Rae
Principal
Energy Transition
Financial Advisory
T: +61 8 8407 7177
E: crae@deloitte.com.au



Su Yin Lim
Director
Energy Transition
Financial Advisory
T: 0433 277 791
E: suylin@deloitte.com.au



Elizabeth Boylan
Director
Energy Transition
Financial Advisory
T: 0428 352 067
E: eboyland@deloitte.com.au



Riccardo Pagliarella
Director
Energy Transition
Financial Advisory
T: 0455 095 968
E: rpagliariella@deloitte.com.au



Alex Oeser
Director
Energy Transition
Deloitte Access Economics
T: 0414 206 930
E: aoeser@deloitte.com.au



Rachel Leaver
Associate Director
Energy Transition
Financial Advisory
T: 0438 187 332
E: rleaver@deloitte.com.au



Srini Rao
Associate Director
Energy Transition
Financial Advisory
T: +61 7 3308 7402
E: sbejjipalli@deloitte.com.au



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