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# WisdomTree Battery Solutions UCITS ETF



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The WisdomTree Battery Solutions UCITS ETF gives investors a way to capture the energy transition megatrend by accessing the broad set of exciting innovations happening in the battery value chain.

The transition away from fossil fuels towards more sustainable energy sources is only possible with more effective energy storage. Lithium-ion batteries present themselves as the most well-established solution for this. Rapid innovation in battery technology is creating a pathway for numerous industries to decarbonise and open new frontiers of growth.

The key drivers of growth in battery solutions are:



**Electric vehicles (EV):** With road transportation responsible for a large proportion of the world's carbon emissions, decarbonising this sector has become a top priority for governments around the world. Not only are batteries becoming more efficient to reduce range anxiety for EV drivers, innovations like solid-state batteries, bidirectional charging, hydrogen fuel cells, and battery swapping could transform how people use their vehicles and how the vehicles interact with the electrical grid.



**Renewable energy:** Rapid development of solar and wind to decarbonise the energy sector creates the challenge of managing intermittency. Grid-scale energy storage can facilitate reliable energy supply even when the sun isn't shining, or the wind isn't blowing. Again, lithium-ion batteries are the dominant technology used in such storage systems. But an electricity grid dependent on renewables will require a wide range of solutions capable of both short and long duration storage. Further innovation in battery types is facilitating this.

The **WisdomTree Battery Solutions UCITS ETF** provides targeted exposure across the battery value chain covering 37 different subsectors across raw materials, manufacturing, emerging technology, and enablers. Designed to evolve with the battery value chain, the ETF provides a diversified approach capturing key components from today's production, but also the emerging technologies set to shape the landscape for years to come.

The WisdomTree Battery Solutions UCITS ETF defines the battery value chain as follows:



**Raw Materials:** Mining companies extract critical minerals such as lithium, cobalt, manganese, nickel and graphite which are essential in battery cell production and other clean energy technologies.



**Manufacturing:** Processors and refiners purify the raw materials before assembling them into core battery components like cathodes and anodes.



**Emerging Technology:** Pioneering firms developing the next generation of battery solutions are building solid-state batteries, hydrogen fuel cells, and even software that enhances the performance of grid-scale storage assets.



**Enablers:** Enabling companies are designing the ecosystem that will support a battery-powered world, ranging from EV charging infrastructure and grid services to specialists in battery recycling once units reach the end of their lifetime.

## Partnership for expertise in the battery value chain

### Wood Mackenzie

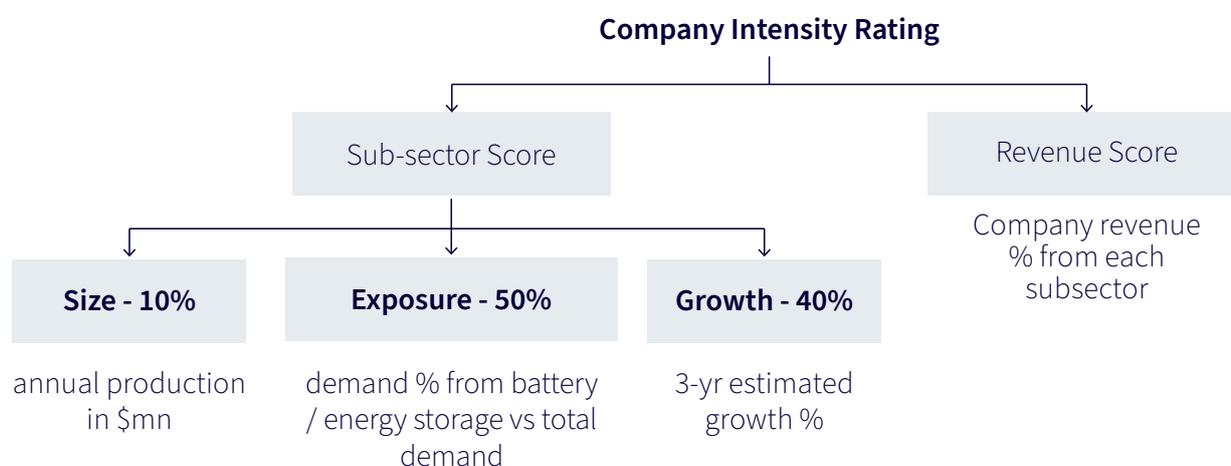
Wood Mackenzie is a leading energy transition research and consulting firm that has been providing quality data, analytics and insights used to power the energy and natural resources industry for nearly 50 years.

Their expertise in energy, chemicals, metals and mining helps us to identify a universe of companies in the battery value chain, meaning we can provide a robust and evolving strategy that delivers a differentiated and targeted exposure to the battery solutions theme. These companies then go through a robust evaluation process at each rebalancing to determine their inclusion and weighting in the final portfolio.

## Index methodology highlight – the intensity rating

The WisdomTree Battery Solutions UCITS ETF tracks the WisdomTree Battery Solutions Index. The strategy can invest in up to 37 different subsectors across the four categories of the value chain described above.

Each company’s inclusion and weighting in the index depends on its ‘intensity rating’. A company’s intensity rating is driven not only by the exposure of the company to the battery value chain (revenue score), but an assessment of the subsector in the battery value chain that the company belongs to (sub-sector score). The sub-sector score, informed by our expert partners, Wood Mackenzie, is based on size, exposure, and growth potential of the subsector.



The index tilts towards pure play companies based on their revenue exposure to the theme and is rebalanced twice a year.

For a complete overview of the index construction, please refer to the [index methodology](#).

## ESG considerations

These companies are then subjected to the ESG screening criteria defined within the WisdomTree ESG framework. For information on the WisdomTree approach to Environmental, Social and Governance (ESG), visit our [responsible investing page](#).

## Why WisdomTree Battery Solutions UCITS ETF?

- Captures segments of the battery value chain **poised for growth** as technological advancement and the energy transition create a wave of demand in the coming decades.
- **Informed by industry experts** who classify the universe into categories and subsectors and determine each company’s intensity rating based on the perceived degree of a company’s involvement in the battery value chain.
- Provides a diversified exposure to as many as 37 unique subsectors within the **battery energy value chain** with a tilt towards pure play companies in the space.

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### Fund Information: WisdomTree Battery Solutions UCITS ETF

Ticker	Exchange	ISIN	Bloomberg Code	Listing Currency	Base Currency	TER%
VOLT	LSE	IE00BKLF1R75	VOLT LN	USD	USD	0.40
CHRG	LSE	IE00BKLF1R75	CHRG LN	GBx	USD	0.40
VOLT	Borsa Italiana	IE00BKLF1R75	VOLT IM	EUR	USD	0.40
VOLT	SIX	IE00BKLF1R75	VOLT SW	USD	USD	0.40
W1TA	Xetra	IE00BKLF1R75	VOLT GY	EUR	USD	0.40
VOLT	Euronext Paris	IE00BKLF1R75	VOLT FP	EUR	USD	0.40

TER: Total Expense Ratio.

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