

Global Industrial Infrastructure

Agriculture, Construction & Mining Equip.

Team Members:

Lawrence T. De Maria, CFA
Ben Elias

<u>Company Name</u>	<u>Ticker</u>
Agco Corp.	AG
All AM Latina Logistica	ALLL11 BZ
Areva SA	CEI FP
Bucyrus International	BUCY
Cameco Corp.	CCO CN
Caterpillar Inc.	CAT
Charter Plc.	CHTR LN
CNH Global NV	CNH
Cummins Inc.	CMI
Deere & Co.	DE
Demag Cranes AG	D9C GR
EnergySolutions, Inc.	ES
GEA Group AG	G1A GR
Joy Global Inc.	JOYG
KonesCranes Oyl	KCR1V FH
Log-In Logista	LOGN3 BZ
Manitowoc Company Inc.	MTW
Terex Corp.	TEX
Weg SA	WEGE3 BZ
Wilson Sons Ltd.	WSO11 BZ

Building, Power & Water Infrastructure

Team Members:

Michael Coleman, CFA
Chase Jacobson

<u>Company Name</u>	<u>Ticker</u>
Encore Wire corp.	WIRE
General Cable Corp.	BGC
Hurco Companies	HURC
Johnson Controls	JCI
Lennox International Inc.	LII
Lincoln Electric	LECO
Lindsay Corp.	LNN
LSB Industries	LXU
Pentair Inc.	PNR
Quanta Services	PWR
Tetra Tech	TTEK
Valmont Industries	WMI
Wabco	WBC
Watts Water Technologies	WTS
Wesco International Inc.	WCC

Engineering & Construction

Team Members:

Chase Jacobson
Michael Coleman, CFA

<u>Company Name</u>	<u>Ticker</u>
AECOM	ACM
Chicago Bridge & Iron	CBI
Fluor Corp.	FLR
Foster Wheeler Ltd.	FWLT
Jacobs Engineering	JEC
The Shaw Group	SGR
Bouygues SA	EN FP
Eiffage SA	FGR FP
Hochtief AG	HOT GR
Vinci SA	DG FP

Multi-Industry**Team Members:**

Nicholas P. Heymann
Lawrence De Maria, CFA
Ben Elias, CFA

Company Name	Ticker
3M Co.	MMM
ABB Ltd.	ABB
Alstom SA	ALO FP
Black & Decker Corp.	BDK
Bombardier, Inc.	BDRBF
Cooper Industries Ltd.	CBE
Danaher Corp.	DHR
Eaton Corp.	ETN
Emerson Electric Co.	EMR
General Electric Co.	GE
Honeywell International Inc.	HON
Ingersoll-Rand Co.	IR
ITT Corporation	ITT
Rockwell Automation Inc.	ROK
Roper Industries, Inc.	ROP
Siemens AG	SIE GR
SPX Corp.	SPW
United Technologies Corp.	UTX