



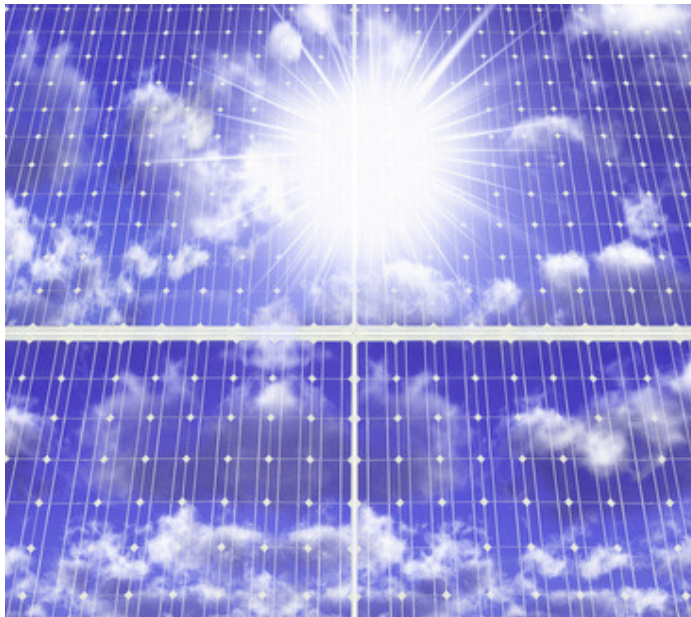
AUSTRALIAN

SNAPSHOT - AUGUST 2011

SOCIALLY RESPONSIBLE INVESTMENT

Is Solar Energy the New Nuclear Energy?

Who could forget the devastating images of Japan we saw three months ago? The most severe earthquake ever recorded shook northwestern Japan on the 11th of March 2011. The quake, which reached level 9.0 on the Richter scale, brought not only destruction and devastation to Honshu, Japan's main island, it also triggered a catastrophic tsunami. A ten meter high wall of water crashed down on Japan's east coast and tore through everything that stood in its way: cars, boats, houses and people. 23,000 people lost their lives in this tragic disaster. 210,000 people had to evacuate and were housed in emergency shelters. 110,000 buildings were raised to the ground¹. But that wasn't all: the severe earthquake also shook the Fukushima Daiichi Nuclear Power Station. After



the failure of the plant's cooling systems and the rising fear of a complete nuclear meltdown, the Japanese government proclaimed a nuclear state of emergency. Prime Minister Naoto Kan ordered the evacuation of all people within a ten kilometer radius of the power station². Three months after the disaster, thousands of outraged Japanese went to the headquarters of power station operator, Tepco, in Tokyo to protest against the use and production of nuclear energy. The head of Greenpeace International, Kumi Naidoo, was among the protestors who demanded that Japan switch to renewable energy as fast as possible. The events in Fukushima gave rise to anti-nuclear energy campaigns and sparked discussion about the switch from nuclear energy to renewable energy worldwide, and especially in Germany³.



¹http://nachrichten.t-online.de/wiederaufbau-in-japan-das-wunder-von-tohoku/id_47141078/index

²<http://www.faz.net/artikel/C30721/erdbeben-in-japan-radioaktivitaet-steigt-im-umkreis-von-japanischem-reaktor-30330151.html>

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The transition from nuclear power to renewable energy

The protests against nuclear energy in Japan have been echoed in Germany. Those protesting have demanded the immediate departure from nuclear energy. At the end of May, the Federal Government made plans for shutting down the nation's nuclear power stations. By 2021 almost all of the nuclear power stations will be turned off. Three power stations will remain active as a reserve until 2022.⁴ Germany is turning to renewable energy as a replacement for nuclear energy and that can be seen all over Germany's roofs. In 2010, more than 100,000 new solar panels were installed across the country, according to the German Association of Solar Energy. Despite this obvious progress, the experts are still disappointed, as federal funding was reduced and suspended lowering the industry's annual results. Nevertheless, experts look optimistically into the coming year. Rising

heating costs and environmental clean-up costs are believed to contribute to a better annual result than 2010, says Carsten König, head of the German Association for Solar Energy⁵. Furthermore, current political actions invigorate the solar industry. The federal government has discarded its projected cut of aids for solar energy plants. The purchase of solar panels by homeowners will still be subsidized by the state.

What is renewable energy?

Renewable energy is a central component of the current energy debate. But what exactly is renewable energy and why has it become so important? As the name implies, renewable energy is energy which comes from natural and renewable resources such as sunlight, wind, rain, tides, and geothermal heat. Renewable energy sources are, by definition, sustainable.



³<http://www.spiegel.de/panorama/0,1518,768057,00.html>

⁴<http://www.spiegel.de/politik/deutschland/0,1518,765576,00.html>

⁵http://www.focus.de/immobilien/energiesparen/energie-deutlich-mehr-solaranlagen-auf-deutschen-daechern_aid_586077.html

Regenerative energies, as renewable energies are sometimes called, are becoming ever more important as fossil fuels become scarcer and continue to cause political strife. Fossil fuels like oil, coal and natural gas, which have consistently been used to produce heat and electricity, are quickly running out. As scarcity increases, prices increase as do political tensions. Countries try to avail themselves of renewable energy, so they no longer depend on limited energy resources and consequently on energy exporting countries like Saudi Arabia or Russia. The International Energy Agency (IEA), a Paris-based organization that provides energy analysis to 28 industrialized nations, expects the world's liquid energy sources to hit 'Peak Oil' in the year 2020. This would mean that after having hit this peak, the amounts of conveyed oil would decline, while the world's demand for energy would rise⁶. Efficient usage of renewable energy could solve the dilemma presented by Peak Oil.

A rising demand for 'green' investments

The devastating nuclear meltdown of the nuclear power station Fukushima and worldwide protests against nuclear energy go along with a rising demand for green investments. The German company 'Solar Fuel' was flooded with new orders since the double disaster.

Solar Fuel produces facilities which convert wind and solar electricity into methane. What is known as ecological gas serves as storage for electricity and carbon dioxide neutral fuel. It is not a surprise that Audi has become Solar Fuel's first corporate client. However, private investors want to ride the green wave, too. This can be deduced from the fact that an asset issued by the company 'German Pellets GmbH' worth 80 million Euros was assigned even before the end of its subscription period⁷. This movement toward renewable energy is not just in Germany. According to the Sydney Morning Herald the majority of the Australians ultimately want the supply of energy to fully consist of renewable energy⁸.

Australia builds world's largest solar panel

Australia doesn't just talk the talk. The world's biggest solar panel will soon be installed Down Under with hopes of helping the country's imminent energy problems. Australia's climatic preconditions and thriftless way of life are believed to make the continent suffer from significant en-



⁶ http://de.wikipedia.org/wiki/Erneuerbare_Energie

⁷ <http://www.manager-magazin.de/finanzen/artikel/0,2828,767390,00.html>

⁸ <http://www.smh.com.au/environment/energy-smart/most-want-100-renewable-energy-survey-20110615-1g3ho.html>

ergy problems. The constant need for air conditioning strains the national grid. Australia is also known to produce a vast amount of greenhouse gases. This triggers international disdain, especially since Australia has refused to sign the Kyoto Protocol. The construction of the tremendous solar panel is therefore classified as an important step in Australian energy politics. The construction of the solar panel in Victoria, which will provide 154 megawatt, is supposed to be finished by 2013. Although Australia still is the biggest coal exporting country in the world and obtains most of its energy supply from coal-burning power plants, recent developments show that Down Under is turning to cleaner energy resources⁹. One company that helps to advance this shift in energy is...



First Global Energy PLC

First Global Energy PLC (Frankfurt Stock Exchange: FGE) has a strategic focus on acquiring global energy-related assets that can be vertically integrated into its business model. FGE's vision is to provide all aspects of the energy supply chain from a diverse range of energy sources with its main focus on the renewable energy sector. FGE currently has many large-scale energy acquisition asset opportunities in the pipeline, which is a result of the FGE management team's energy experience, key influential networks with major global energy players, and various international govern-

ment authorities. Through the global reach of these extensive networks, FGE is also a key facilitator in the initiation of many significant energy projects, which include a number that have been mandated by government authorities. FGE is strategically positioned as a conduit connecting many parts of the energy supply chain, which increases the growth and scope of the company within Australia and abroad. In 2011 FGE acquired Solar SA Pty Ltd, a retail solar energy company within South Australia with 5 years experience. In addition FGE recently acquired another South Australian Solar energy company, Advance Energy Savings Pty Ltd, a retail solar energy provider and home improvements expert with 6 years experience. With the acquisition of these two companies, Solar SA has realized substantial operational synergies and has quickly become a leader in the retail solar industry in South Australia, with a current combined EBIT of \$3-4m per year. As part of Solar SA's business growth strategy, they have

 ⁹<http://www.spiegel.de/wissenschaft/mensch/0,1518,444726,00.html>



just recently opened 2 new retail sites in regional South Australia, and are also in active negotiations for interstate solar retail opportunities. With a target of opening 7 more retail solar sites throughout Australia over the next 2-3 year period. Each new site is forecasted to generate an additional \$3-4m EBIT per year. As part of FGE's exclusive license agreement with Kotak, FGE will also be expanding into the distribution of solar panels and other solar products, including Solar Lanterns, Hot Water Systems, Invertors, and LED Lights to other solar energy retailers within Australia and Asia Pacific. Our initial conservative profit forecasts for the distribution arm of FGE range between EBIT of \$2-3m per year. FGE is also in negotiations with Malaysian government authorities to provide Turnkey Solar Power Plants (Solar Farms) starting from 500KW per solar farm. FGE has recently entered into an exclusive license agreement with KOTAK URJA™ Private Limited, for the exclusive supply of solar panels and other solar products within Australia and Asia Pacific. KOTAK URJA™ is based in Bangalore, India as part of the KOTAK family enterprise, and are a group concern which is engaged in diverse commercial activities not only in India but globally as well. They are involved in the areas of

Exports-Imports of Textile Raw materials & Finished Products, Energy Solutions, Engineering Goods, Agricultural Products & Minerals and, Financial and Insurance solutions through various group concerns. KOTAK URJA™ has made tremendous contributions over many generations, thereby saving over 48 MW plus Thermal & PV energy every year. Over 1.2 million tons of CO² savings are achieved regularly. KOTAK URJA™ as part of their license agreement with FGE also provides favorable financial terms on the supply of all solar products to FGE for the retail and distribution supply. They will also be partnering with FGE for the supply of solar panels for large Turnkey Solar Farms. When considering the motto, "as electricity prices increase the payback period for solar decreases", the pending Australian Carbon Tax, and accompanying billion dollar renewable subsidy program, these factors point to the narrowing of the solar sector timetable towards grid parity, whereby unsubsidized solar power will cost no more than "dirty" power. This provides an optimistic future for solar energy, with FGE perfectly positioned to benefit.

Further information available at:
www.fgeplc.com

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Company Fact Sheets



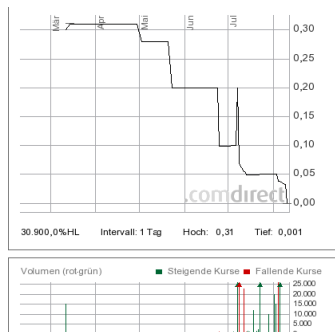
First Global Energy Ltd, Ratios



◇ Symbol: FRA	1GX
◇ Website:	www.fgeplc.com
◇ 52 week high	0,310
◇ 52 week low	0,001

Source: Boerse Frankfurt, 10 August

Company Highlights



Source: Comdirect, 10 August

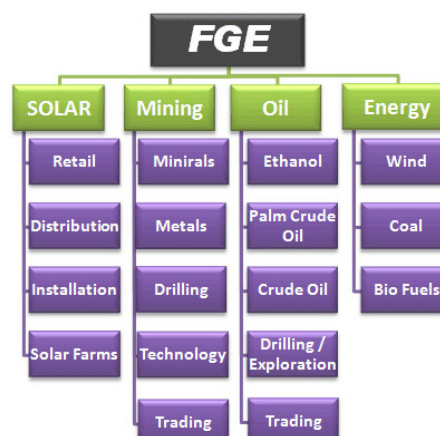
- ◇ Aims in acquiring assets to be vertically intergrated
- ◇ High quality solar energy products
- ◇ Significant inroads in Australian solar markets. In negotiation with Malaysian government to provide solar farms.
- ◇ Significant consolidated EBIT of \$3-4m per year
- ◇ Diversified income streams and asset base

Field of Activity

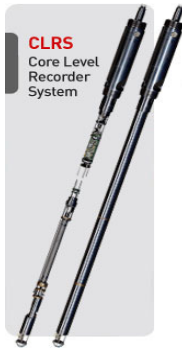
First Global Energy PLC is a publically listed company on the Frankfurt Stock Exchange deutsche borse under the code 1GX. First Global Energy PLC has 100% ownership of the Australian Company "First Global Energy Ltd". FGE Ltd is the Australian trading company. FGE is an "energy" company and its strategic focus is to acquire energy related assets. The company aims in acquiring assets that can be vertically integrated.

First Global Energy has exclusive contracts with 3 of the large manufactures to supply Solar Energy related products in Australia/NZ. All our products are of the highest quality product and are all certified to meet standards of the market it resides in.

FGE



Coretrack Ltd, Ratios



◇ Symbol: Sydney	CKK
◇ Website:	www.coretrack.com.au
◇ Market Capitalization (10 August)	19.45 Mio. AUD
◇ Receipts from customers (12 months)	782.000 AUD

Source: Comdirect, appendix 4C quarterly report

Company Highlights



Source: Comdirect, Australian securities exchange, 10 August

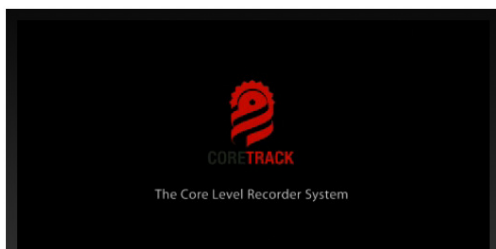
- ◇ Core Level Recorder System
- ◇ Real time measurement
- ◇ A drilling company with a unique technology in the process of being commercialised
- ◇ Coretrack and its subsidiary Globe Drill Pty Ltd are currently in commercial negotiations with various companies

Field of Activity & News

Coretrack is an ASX listed company that provides technical solutions to the energy industry in the form of down hole tools, products and services. Since the company's conception, Coretrack has focused primarily on building and introducing its highly anticipated integrated core tracking tool, the Core Level Recorder System (CLRS) into the commercial market.

- ◇ 01 August 2011: CEO Position
<http://www.asx.com.au/asxpdf/20110801/pdf/42044gbr985hvd.pdf>
- ◇ 28 July 2011: Whicher Range Contract Goes Unconditional
<http://www.asx.com.au/asxpdf/20110728/pdf/4200vrhy9328qh.pdf>
- ◇ 28 July 2011: Independent Experts' Reports Received on GT3000
<http://www.asx.com.au/asxpdf/20110728/pdf/4200rdky4z56x4.pdf>

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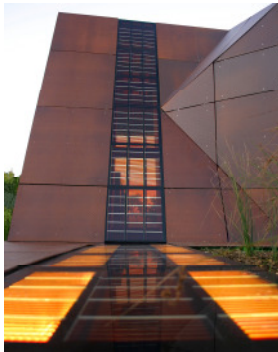


👉 **CLRS Animation**
http://www.ckklimited.com/images/file/annual-reports/ckk_annual_report_2010.pdf



👉 **Annual Report 2010**
http://www.ckklimited.com/images/file/annual-reports/ckk_annual_report_2010.pdf

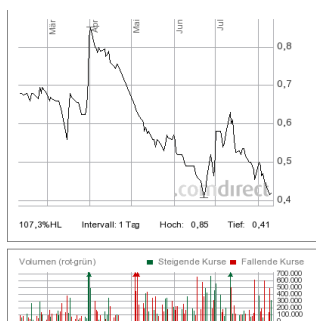
Dyesol, Ratios



◇ Symbol: ASX	DYE
◇ Website:	www.dyesol.com
◇ Market Capitalization (10 August)	60.01 Mio. AUD
◇ Receipts from customers (12 months)	1.897 Mio AUD

Source: Comdirect, appendix 4C quarterly report

Chart & SRI - Highlights



Source: Comdirect, Australian securities exchange, 10 August

- ◇ Commercialization of dye solar cells
- ◇ Leading supplier of 3rd generation solar technology
- ◇ Lowest embodied energy of any solar technology
- ◇ Minimized energy and water usage in manufacturing operations

Field of Activity & News

Dyesol works in the commercialization of dye solar cells for energy production. Dyesol develops & produces materials that are necessary for dye solar cells. Dyesol market test and lab instruments and provide consulting & technical services.

Dyesol operates in the B2B area. For example, Corus - the worlds fifth biggest steelmaker - and Dyesol in a joint production plant work together to produce steel using a dye solar cell coating technology that will produce power.

- ◇ 10 August 2011: DyeTec Solar Fully Equipped
<http://www.asx.com.au/asxpdf/20110810/pdf/4209t5gkzm9py.pdf>
- ◇ 29 July 2011: June 2011 Quarterly Report and Appendix 4C
<http://www.asx.com.au/asxpdf/20110729/pdf/4202m4xfq5yj0w.pdf>
- ◇ 21 June 2011: Strategic Vision - Buildings as Power Stations
<http://www.asx.com.au/asxpdf/20110621/pdf/41zbcj83swg0zd.pdf>

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👉 **'Dyesol takes research to Japan and creates solar steel in Wales'**
http://www.pv-magazine.com/news/details/beitrag/dyesol-takes-research-to-japan-and-creates-solar-steel-in-wales_100003343/



👉 **'Investor Update: Australian solar innovation wins R&D grants in Japan'**
<http://www.climatespectator.com.au/commentary/green-deals-dye-cast>

Fairs & Congresses



13th Renewable Energy Finance Forum

20th - 21st September 2011, London, United Kingdom

The Renewable Energy Finance Forum - London is Europe's largest and most established event for renewable energy finance and investment.

The two-day event will unite investors with senior executives from across the renewable energy and technology sectors, to provide delegates with cutting-edge insight as well as unparalleled networking opportunities.

QUICK FACTS

WHEN?

20th - 21st September 2011

MORE INFORMATION

<http://www.euromoneyenergy.com/EventDetails/0/3963/13th-Renewable-Energy-Finance-Forum-London.html>

WHERE?

London, United Kingdom

Climate Action in the New Global Economic Order

10th - 11th October 2011, London, United Kingdom

The 15th Annual Chatham House Conference on Climate Change will assess the prospects for progress on climate action at the UN talks in Durban and in other spheres.

What progress can be expected at the UN talks in Durban and what level of climate change are they on track to prevent?

As developed countries cut back on spending, what are the prospects for action on climate?

How do national climate plans link in with the global framework?

QUICK FACTS

WHEN?

10th - 11th October 2011

MORE INFORMATION

<http://www.chathamhouse.org/climatechange2011>

WHERE?

London, United Kingdom