

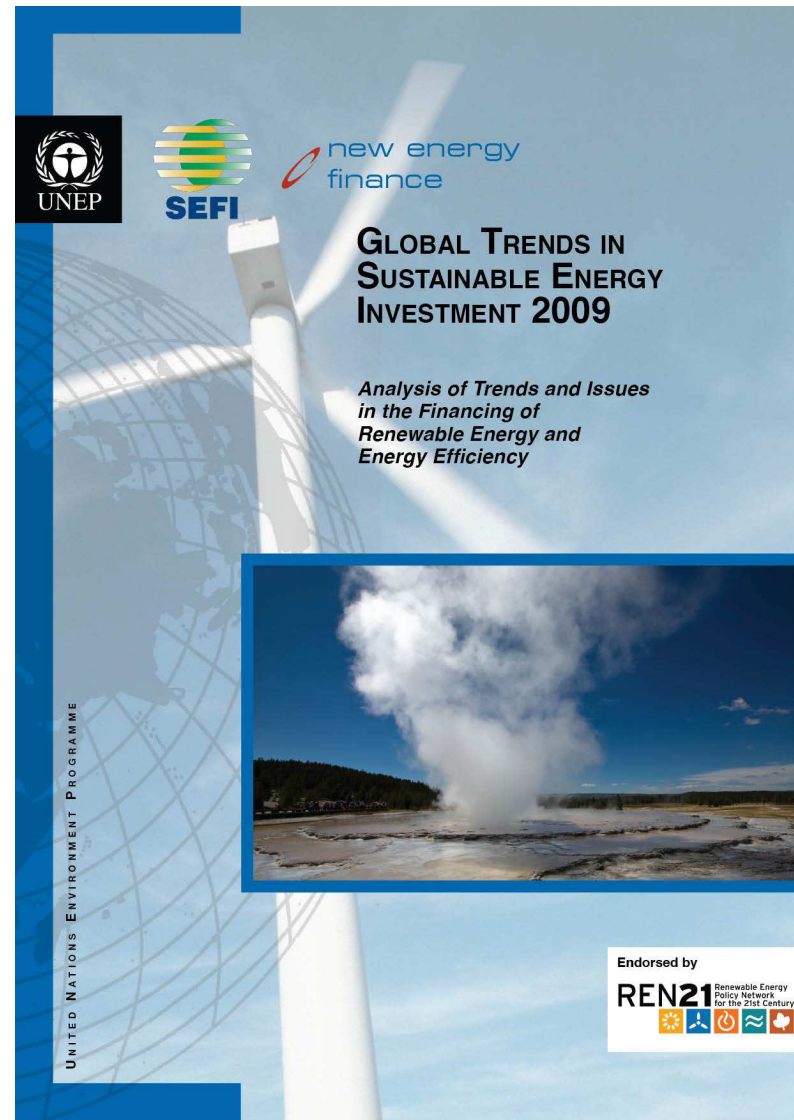
Global Trends in Sustainable Investment 2009

*Presentation to
SEF Alliance Members*

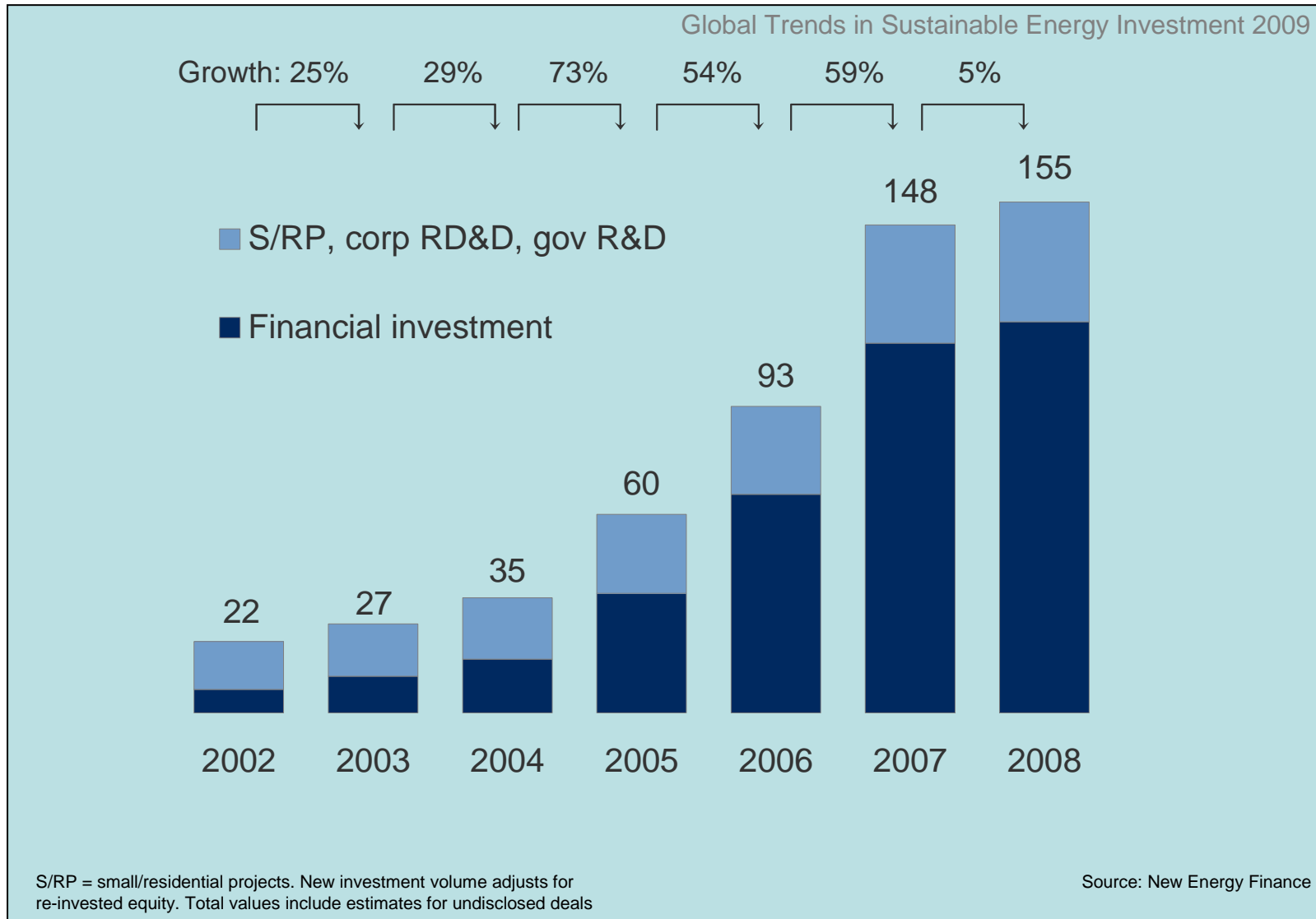
11 June 2009

*Ethan Zindler
Head of Research, NA
New Energy Finance*

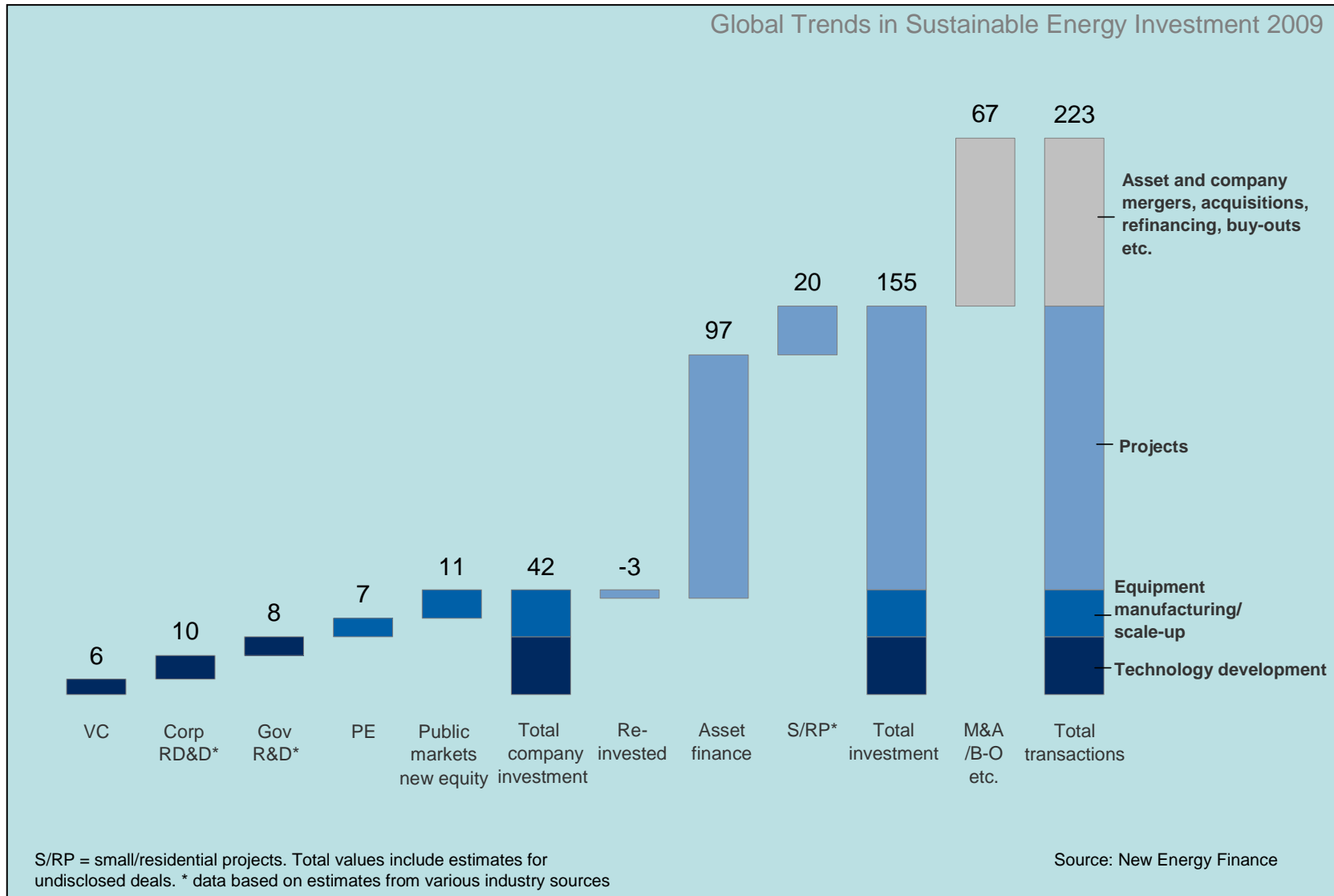
ethan.zindler@newenergyfinance.com



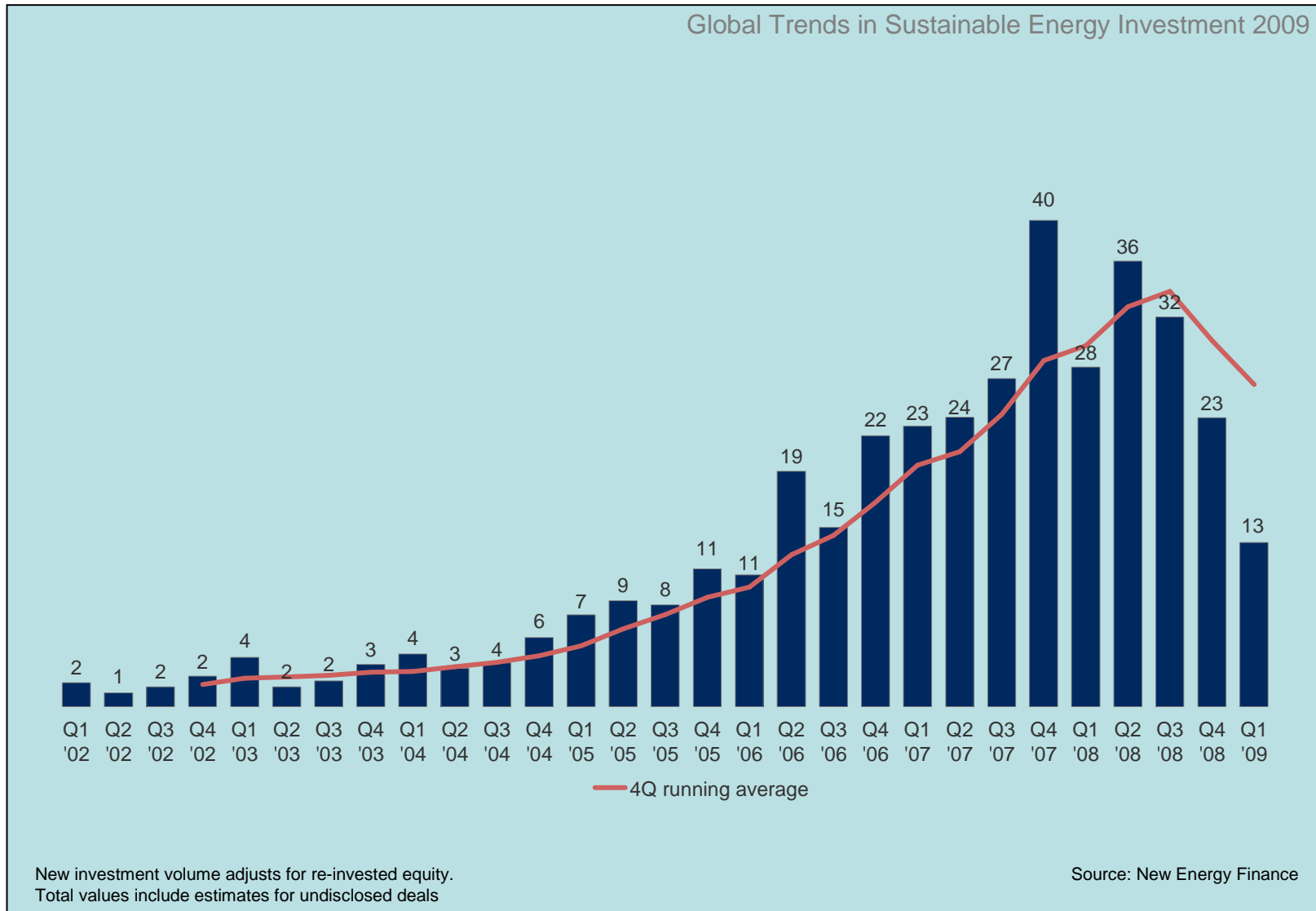
Global New Investment in Sustainable Energy, 2002-2008, \$ billions



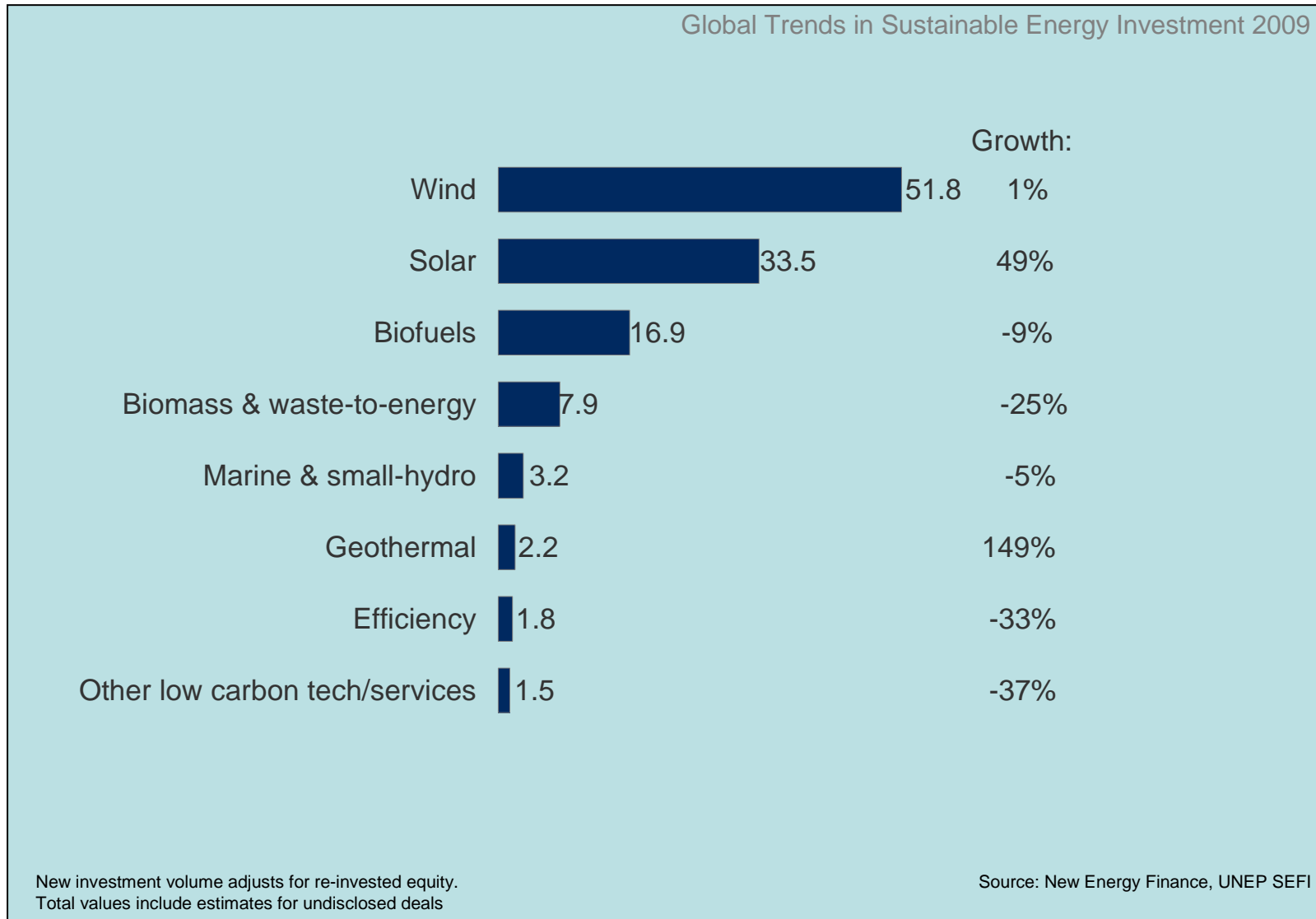
Global Transactions in Sustainable Energy, 2008, \$ billions



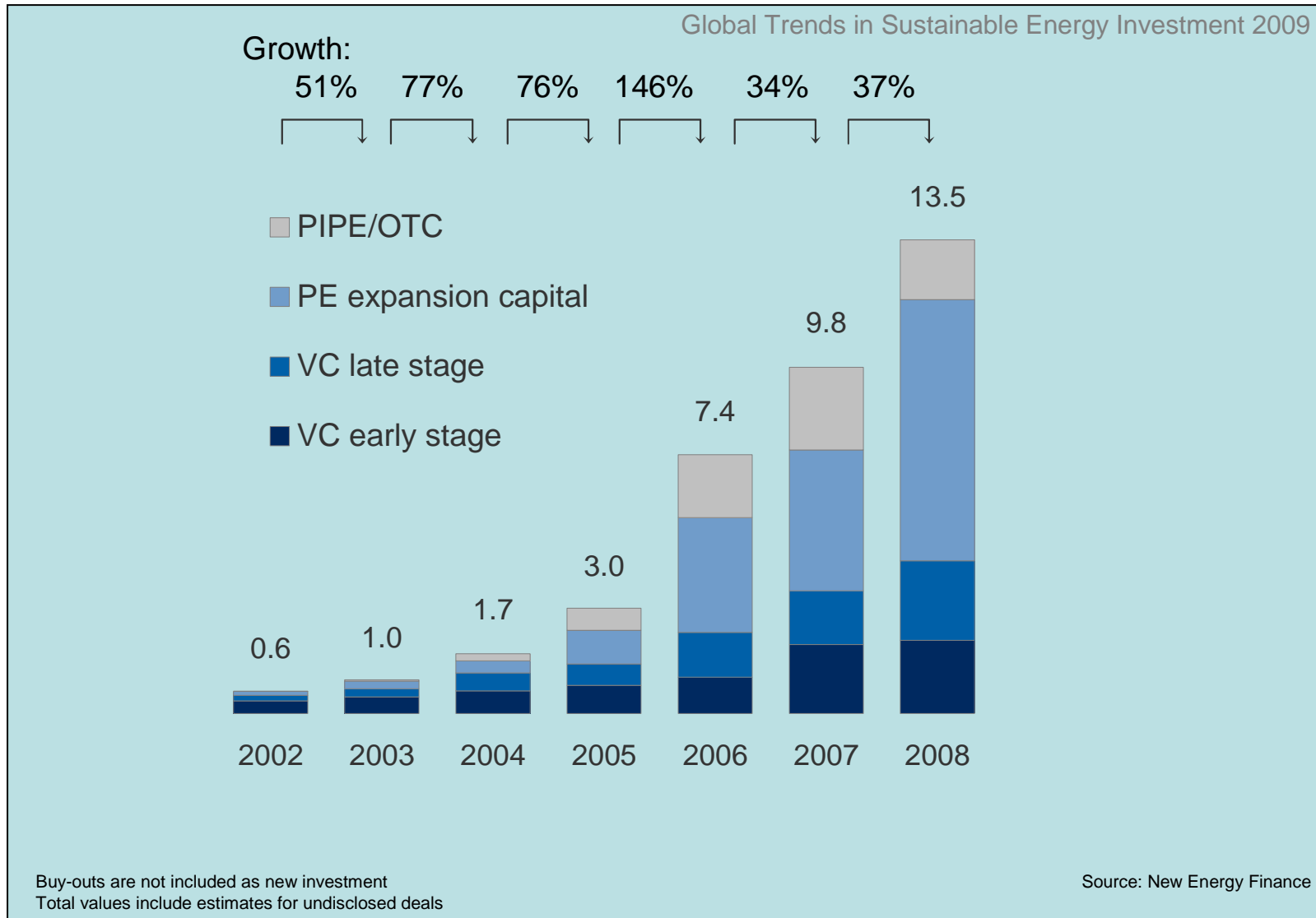
Global Financial New Investment Quarterly Trend, Q1 2002 - Q1 2009, \$ billions



Financial New Investment, by Technology, 2008 and growth on 2007, \$ billions

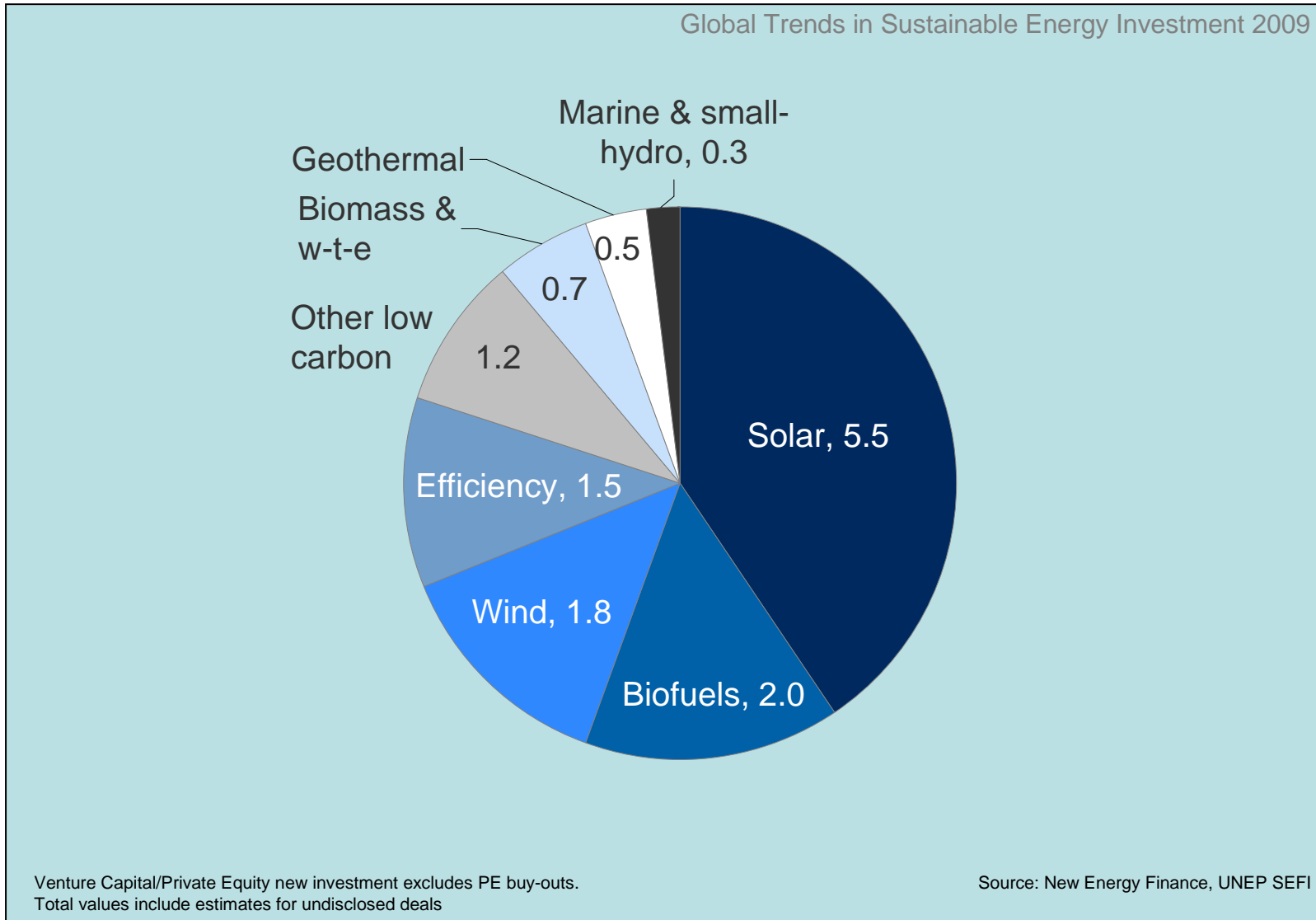


VC/PE New Investment, by Stage, 2002-2008, \$ billions

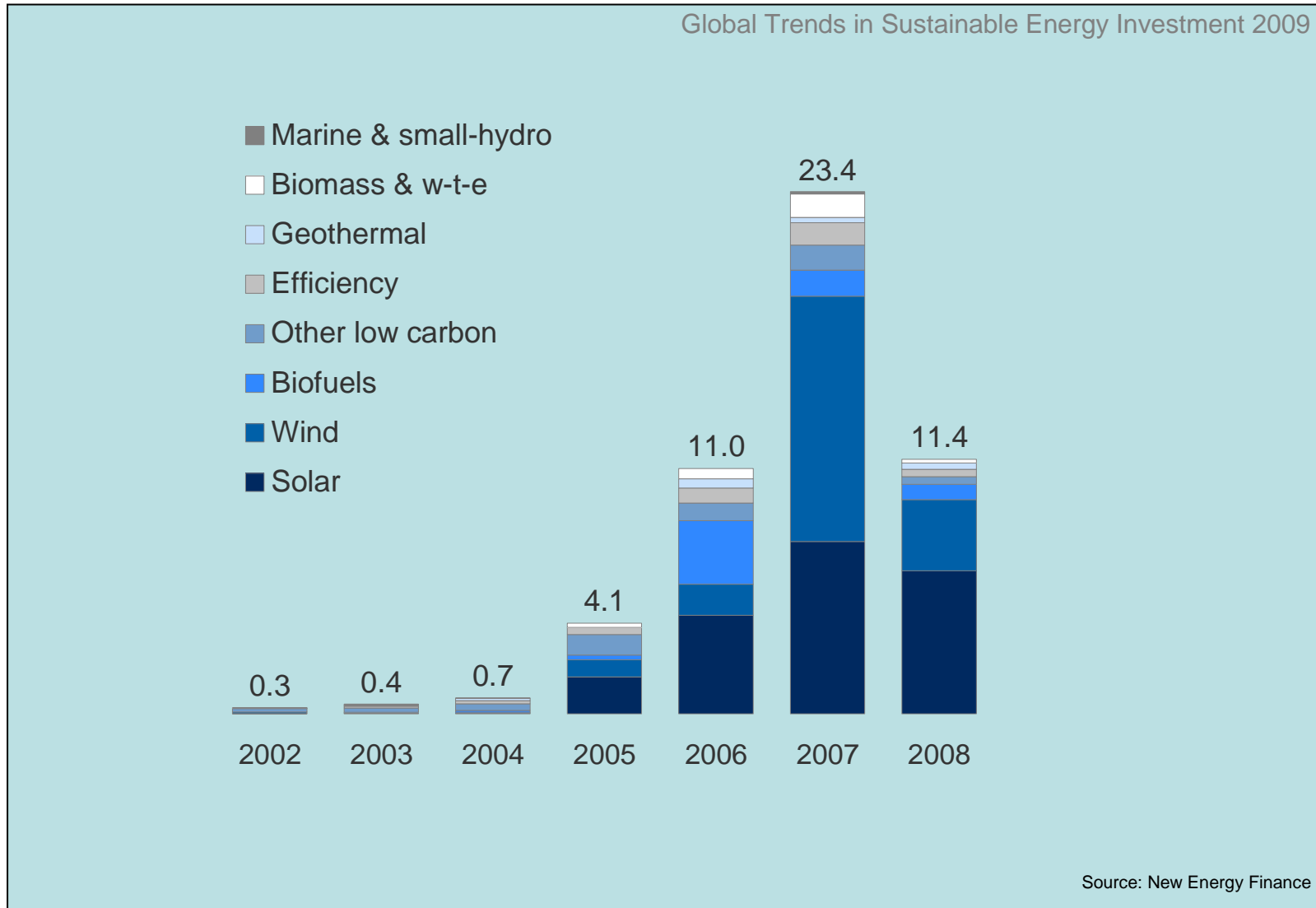


VC/PE New Investment, by Technology, 2008

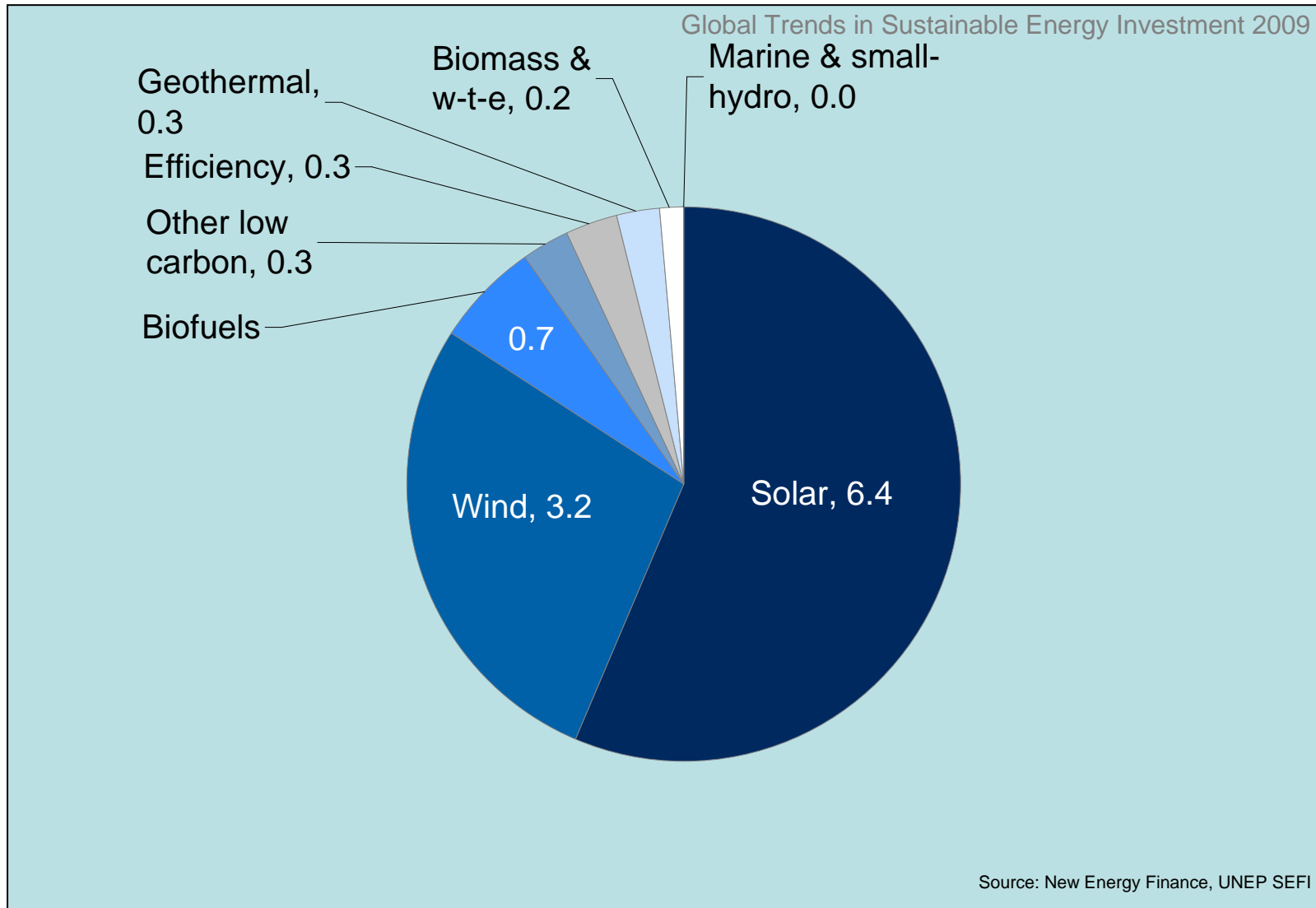
\$ billions



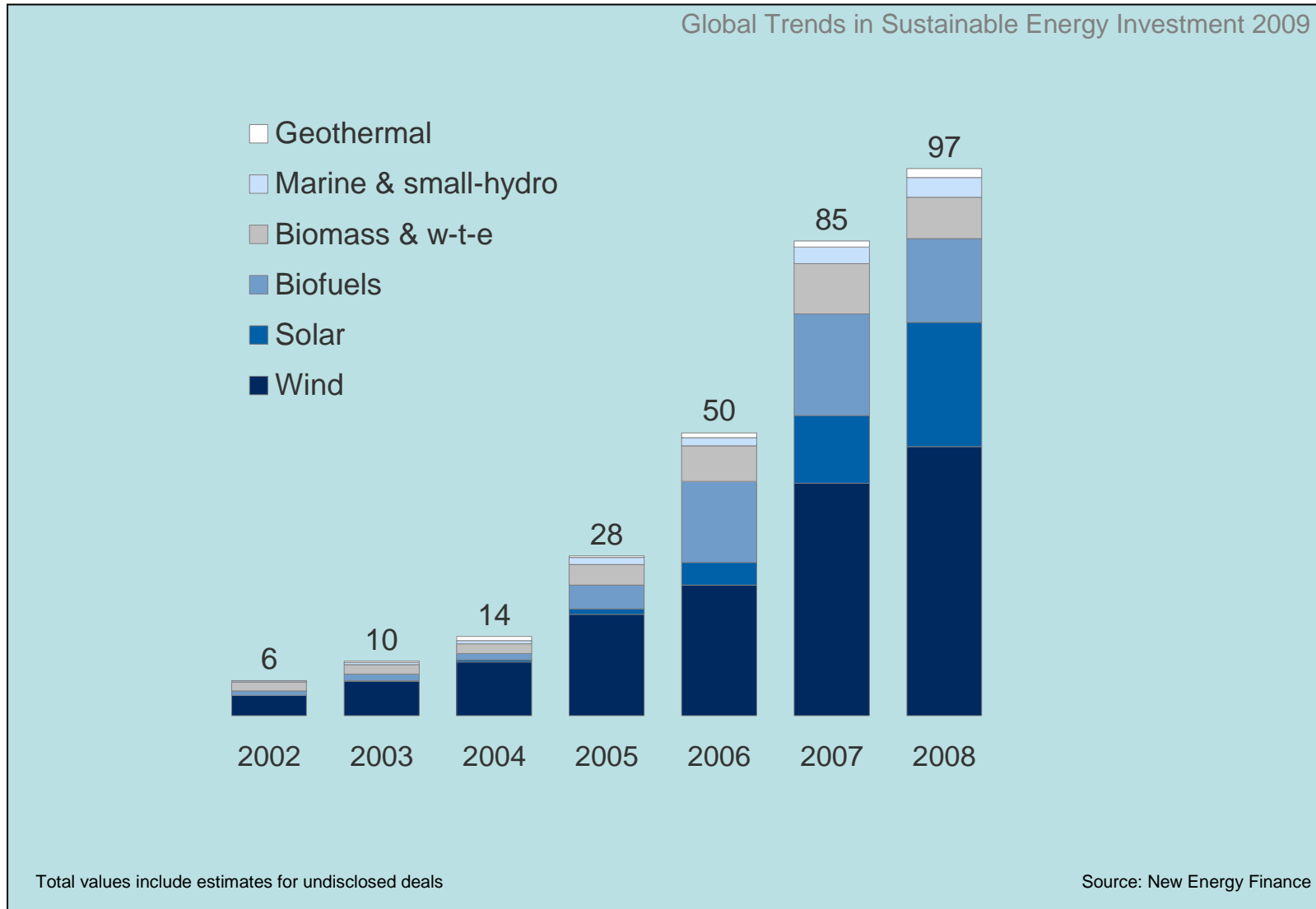
Public Market New Investment, by Technology, 2002-2008, \$ billions



Public Markets New Investment, by Technology, 2008 \$ billions

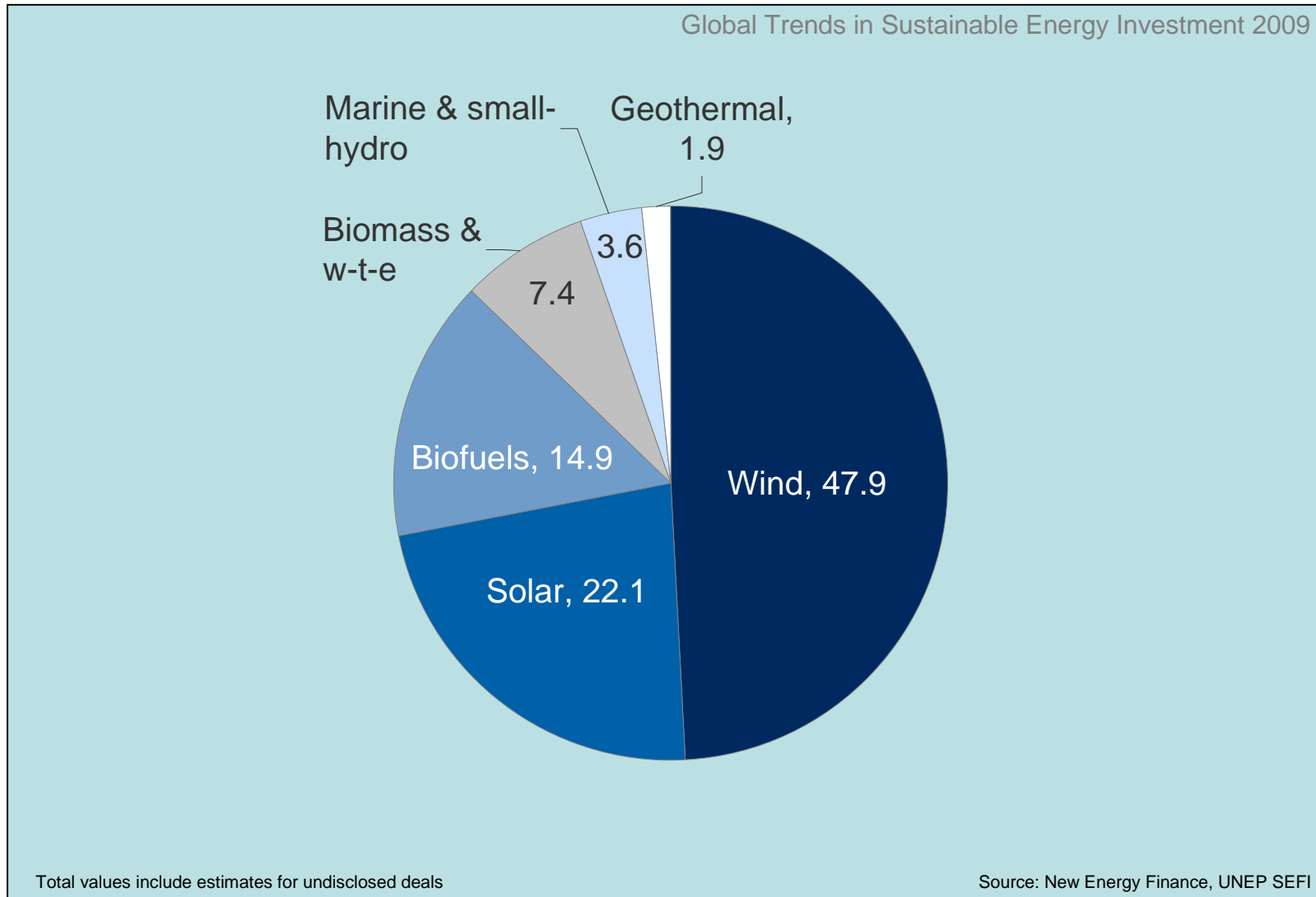


Asset Financing New Build, by Technology, 2002-2008, \$ billions

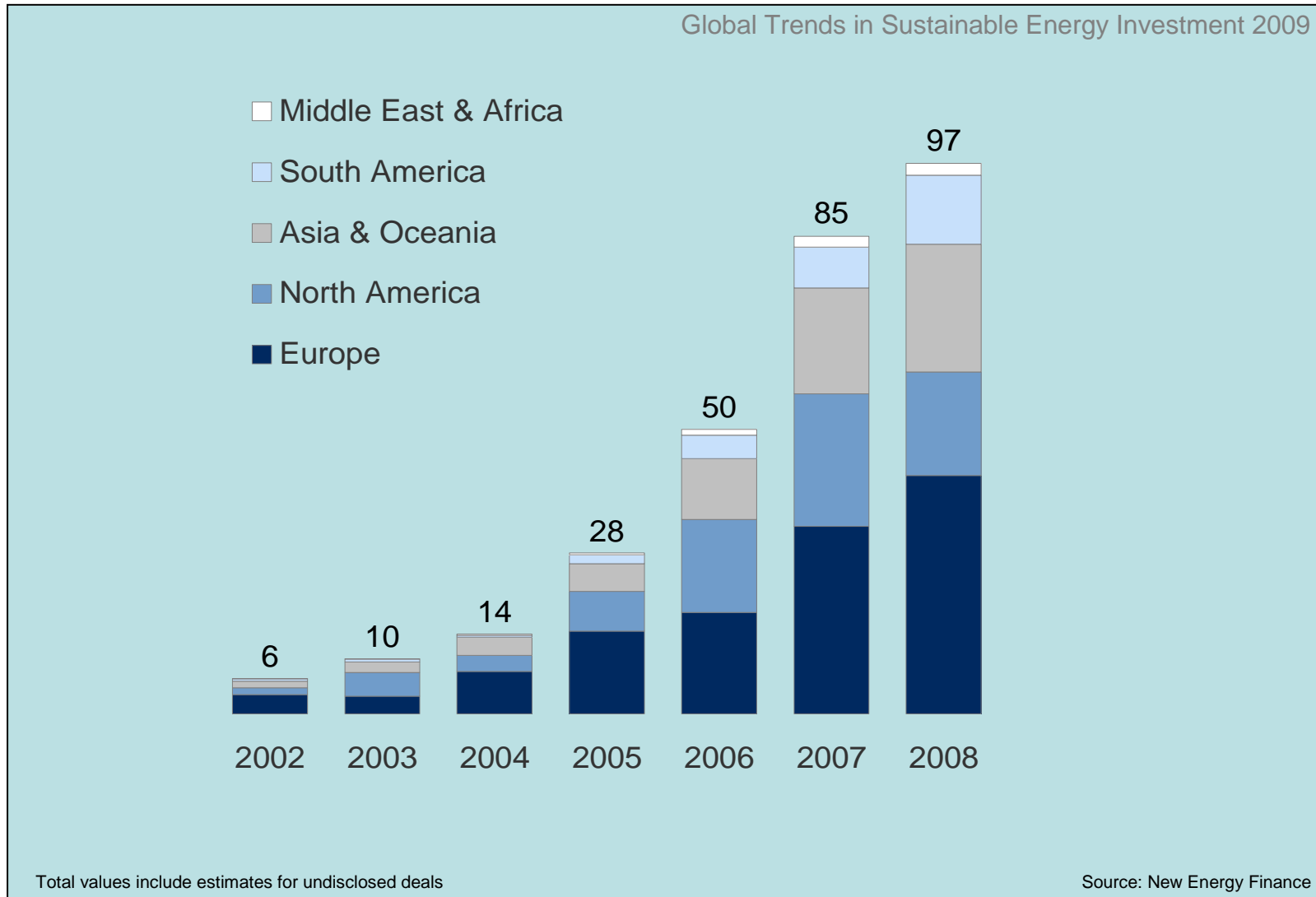


Asset Finance New Build, by Technology, 2008

\$ billions



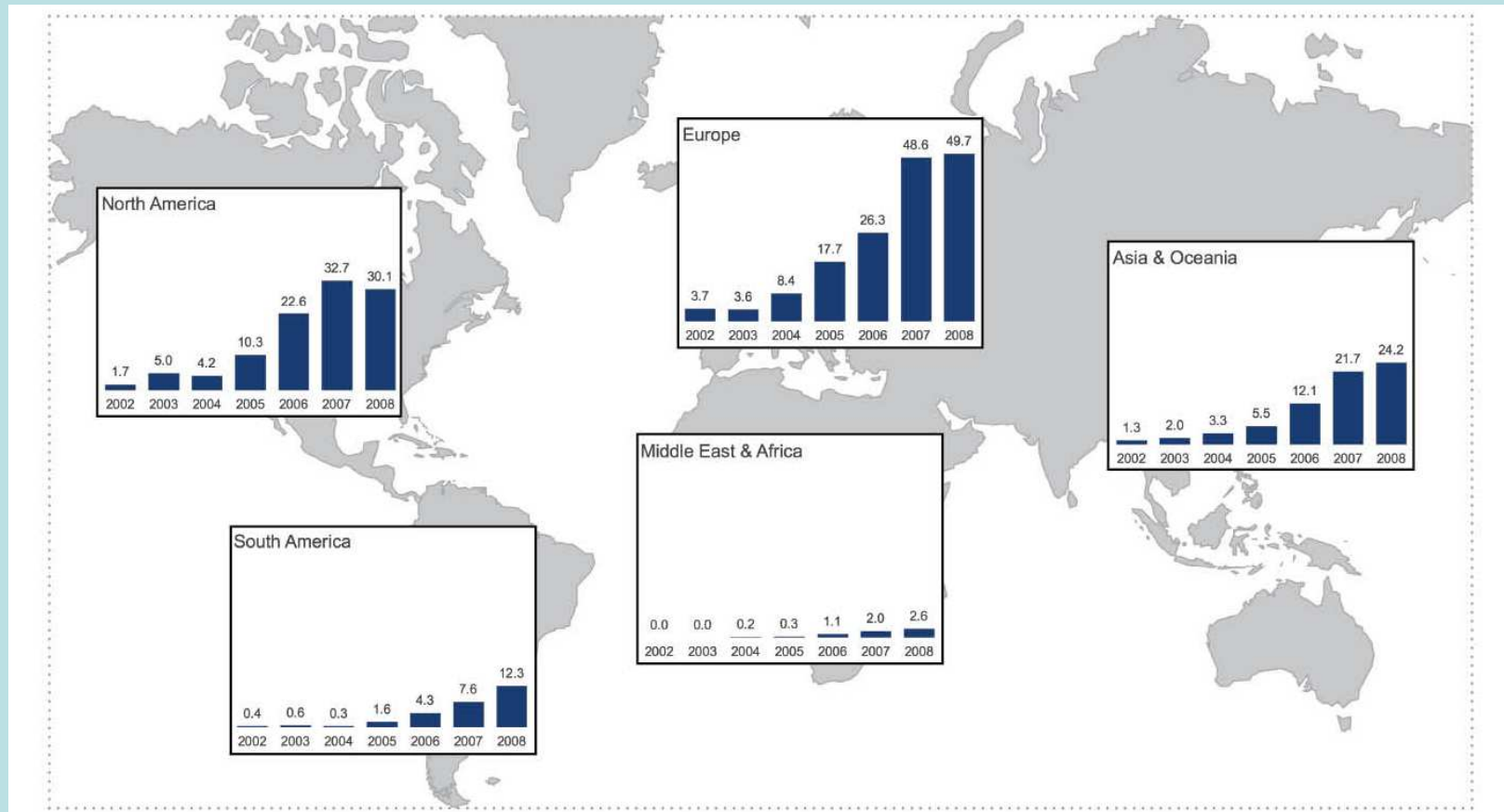
Asset Financing New Build, by Region, 2002-2008, \$ billions



Financial New Investment by Region, 2002-2008

\$ billions

Global Trends in Sustainable Energy Investment 2009

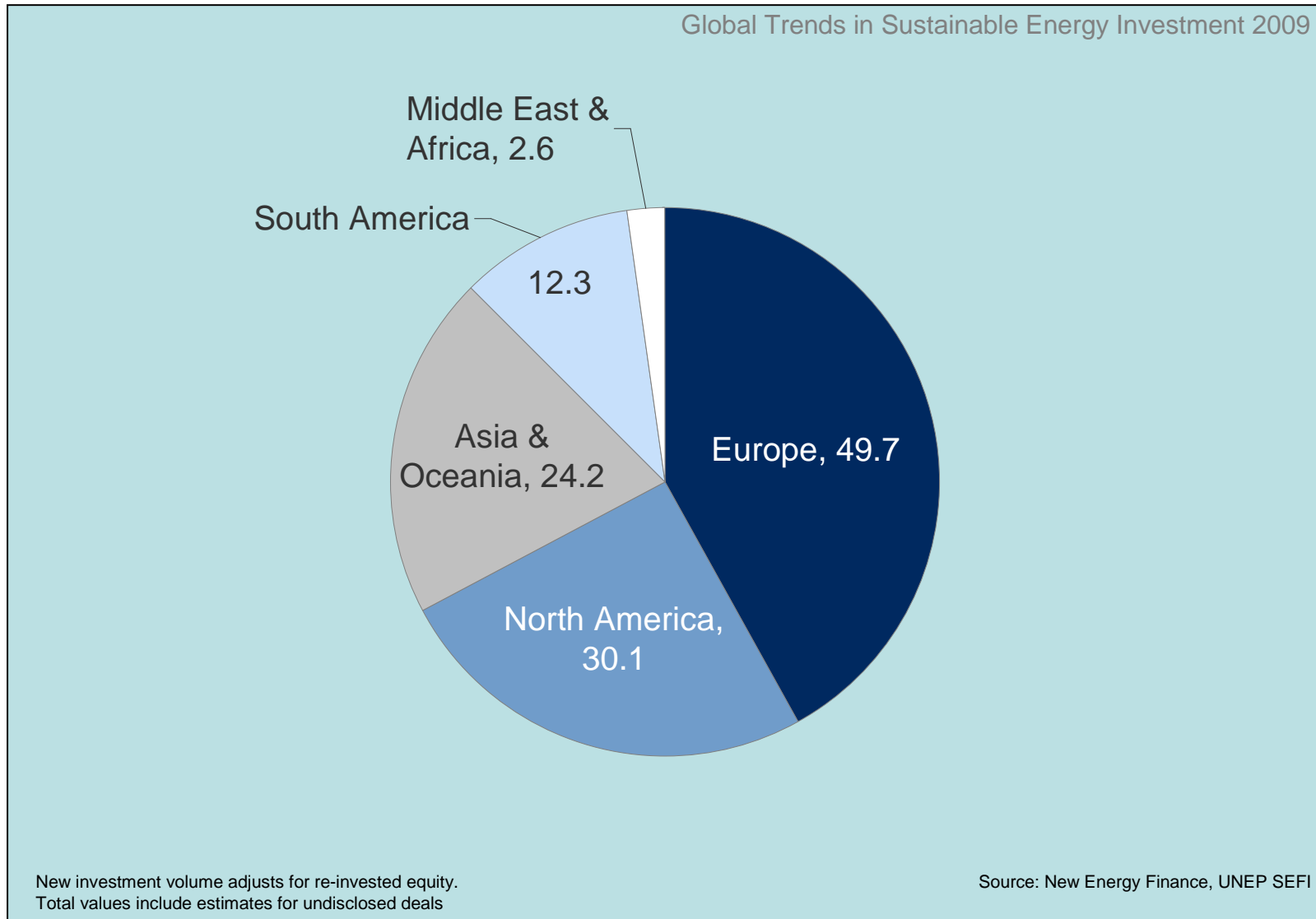


New investment volume adjusts for re-invested equity.
Total values include estimates for undisclosed deals

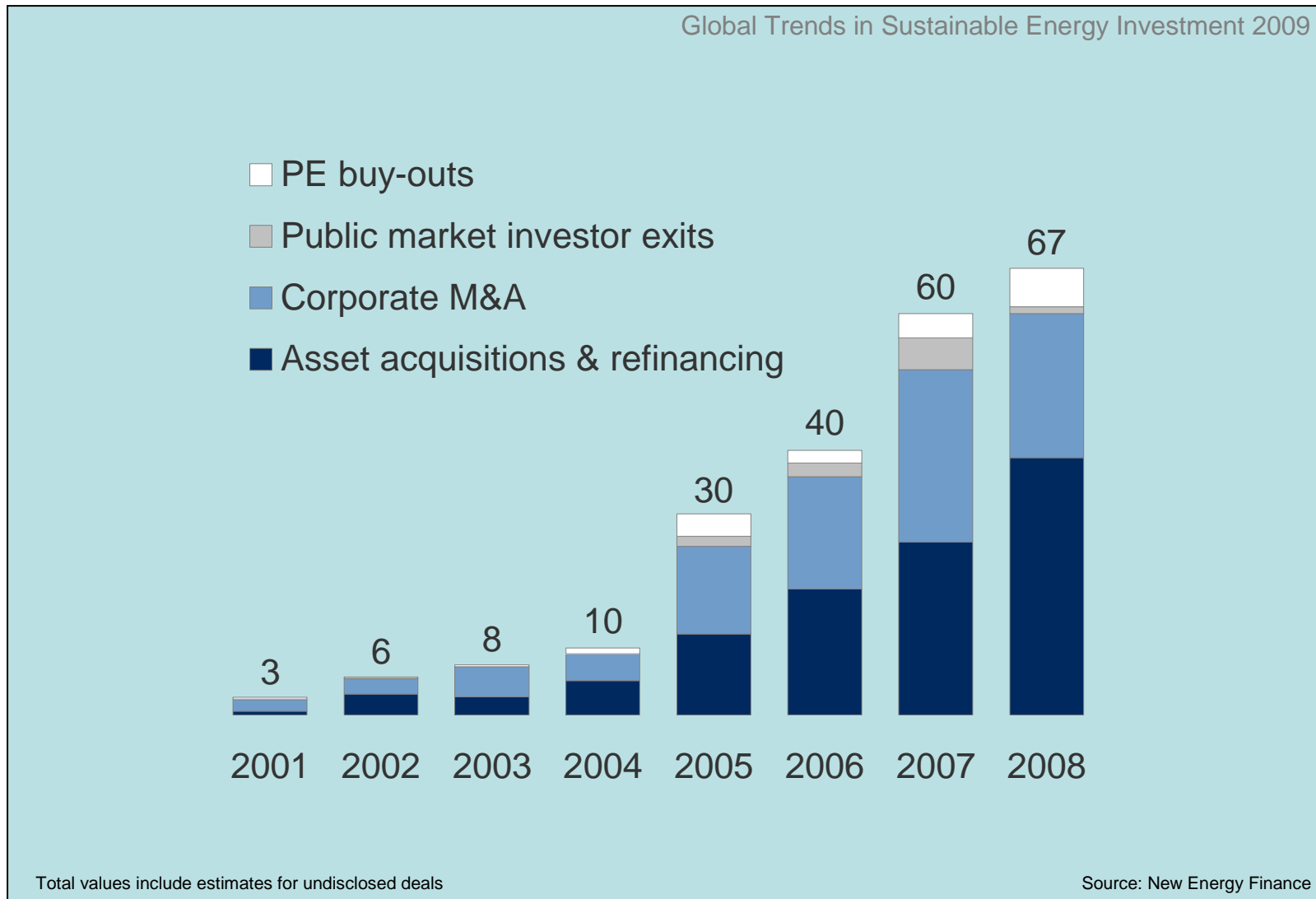
Source: New Energy Finance, UNEP SEFI

Financial New Investment by Region, 2008

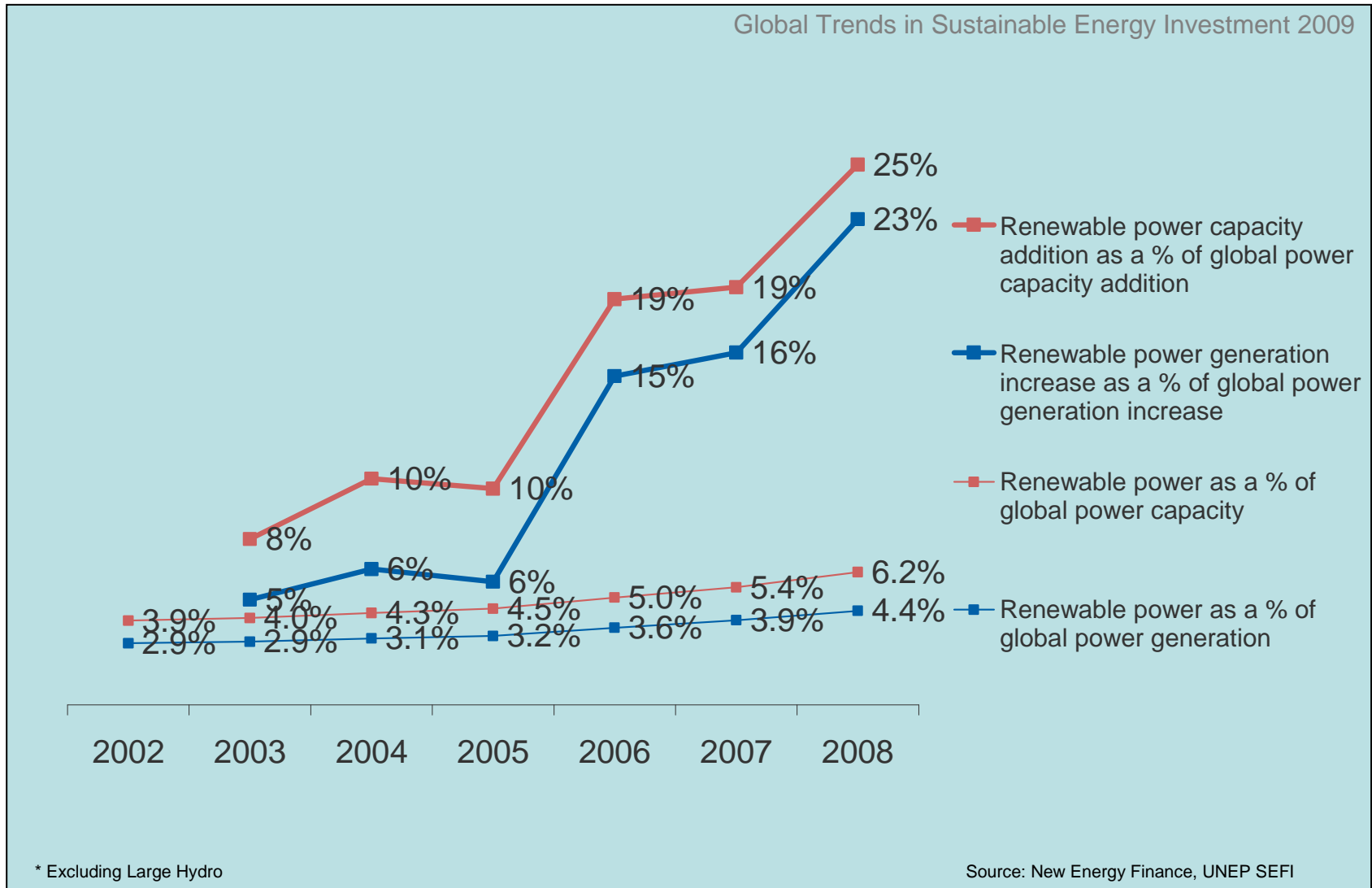
\$ billions



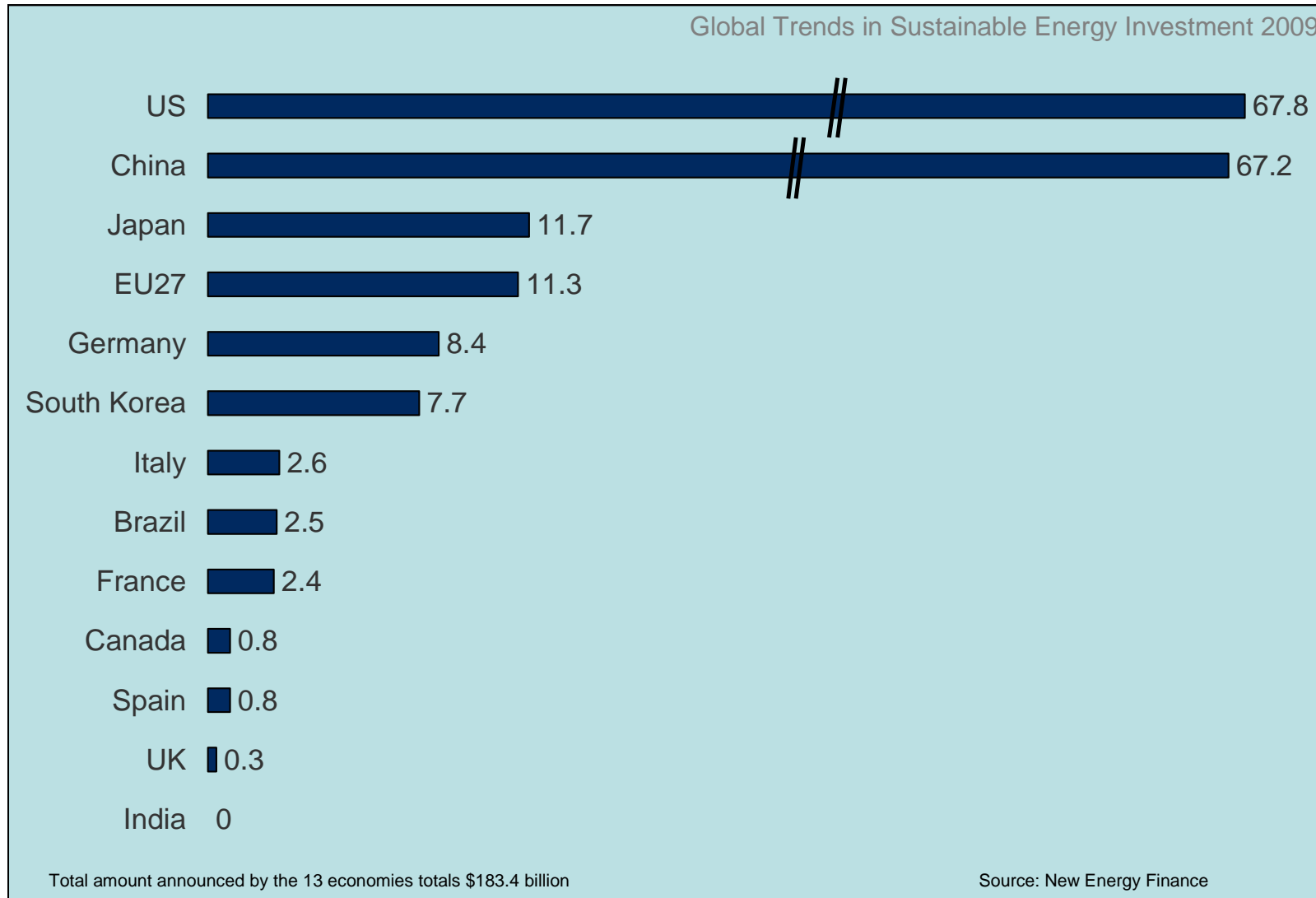
Acquisition Transactions by Type, 2001-2008, \$ billions



Renewable power* Generation and Capacity as a proportion of global power, 2002-2008, % share



Green Stimulus allocations to Sustainable Energy by Country, April 2009, \$ billions



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