

Five Battery Tech Stocks to Know About



Wind and solar energy are forecast to supply around 48% of world electricity needs by 2050, with battery technology, gas peakers (turbines/engines that burn natural gas) and dynamic demand anticipated to drive market penetration of solar and wind by more than 80% according to BloombergNEF¹.

While investors may be well aware of Tesla's credentials in battery storage, the supply chain for battery technology extends far beyond one company and covers mining companies, manufacturers of battery storage and storage technology providers.

The companies listed below are all found in the ETFS Battery Tech & Lithium ETF (**ASX Code: TECH**).

Five Companies Fuelling the Transition



SolarEdge Technologies Inc (NASDAQ: SEDQ)

SolarEdge is a US-domiciled manufacturer of energy technologies, including power optimisers and solar inverters. It has a global customer base, but also has a majority market share in the US, with 60% of the residential solar inverter market². SolarEdge have also ventured into the electric vehicle (EV) market by producing the world's first EV charging inverter, which has the ability to charge EVs up to 2.5 times faster than current models³.



NGK Insulators (TYO: 5333)

NGK Insulators is a Japanese ceramics company responsible for battery systems, insulators, and equipment. They were responsible for the world's first commercialised battery storage system capable of megawatt level electrical power storage and produce lithium-ion rechargeable batteries with high heat resistance. They are also researching and developing an alternative in the form of zinc rechargeable batteries.



LG Chem (KRX: 051910)

LG Chem is a Korean chemical company with a portfolio across petrochemicals, advanced materials and life sciences. It was the first to mass produce lithium-ion batteries in Korea and has the leading market share in automobile batteries. They also produce carbon nanotube (CNT) which is used for lithium-ion battery cathodes. It supplies some of the world's major car manufacturers like Renault and Volkswagen.



Galaxy Resources (ASX: GXY)

Galaxy Resources is an Australian mining company focused on lithium. It has mines in Australia, Canada and Argentina. The mine in Argentina has the potential to be the lowest cost producer of lithium in the world through oil brine extraction. Lithium accounts for 85% of commissioned utility scale battery storage and Galaxy Resources is likely to benefit from the continuing demand for lithium to support battery storage.



EnerSys (NYSE: ENS)

EnerSys is a US based manufacturer of power storage solutions for industrial applications and has 21% worldwide market share in this field. Its products include batteries, charging and power modules, monitoring and fleet management and energy systems used in industries such as telecommunications and transportation.

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^[1] <https://about.bnef.com/new-energy-outlook/>

^[2] SolarEdge, Enphase Hit by Sharp Slowdown in Solar Installations During Pandemic's Depths – The Leading Solar Magazine In India (eqmagpro.com)

^[3] Tesla's Top Competitors In The Clean Energy Market Right Now (cmcmarkets.com)

^[4] company_en.pdf (ngk-insulators.com)

^[5] <https://about.bnef.com/new-energy-outlook/>

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