



**ZAPP LN**

IE00070SLDT6

# Global X U.S. Electrification UCITS ETF

THEMATICS



A fund that seeks to provide exposure to companies that potentially stand to benefit from the increased electricity demand and electrification within the United States.

For Professional Investors only.

## INTRODUCTION

U.S. electrification is the structural shift to electricity as the primary energy source across transportation, industry, buildings, and digital infrastructure.<sup>1</sup> Rising power demand from electric vehicles, data centres, advanced manufacturing, and grid modernisation, requires significant investment to expand generation capacity, upgrade transmission networks, and deploy enabling technologies.<sup>2</sup> This multi-decade transformation could reshape the country's energy system while improving efficiency, resilience, and economic growth.<sup>3</sup>

Grid infrastructure and power technologies are complementary pillars within this ecosystem. Utilities, equipment manufacturers, grid component suppliers, and energy management providers are central to expanding and modernising the electricity network.<sup>4</sup> By enhancing capacity, reliability, and energy distribution, they could play a critical role in meeting rising electricity demand and supporting the continued electrification of the U.S. economy.<sup>5</sup>

**ZAPP LN** seeks to provide exposure to companies engaged in conventional and alternative electricity generation, transmission and distribution, as well as those involved in the development, manufacturing, deployment, or modernisation of grid infrastructure and smart grid technologies.

## DID YOU KNOW?

- A single ChatGPT query can require ~10x the energy of a typical Google search.<sup>6</sup>
- U.S. electricity demand could increase by up to 50% by 2040.<sup>7</sup>
- The U.S. Department of Energy projects that data centres could consume as much as 12% of U.S. electricity by 2028, almost 3x higher than its 4.4% share in 2023.<sup>8</sup>
- Deloitte projects that total industry investment in the U.S. power sector could reach roughly \$1.4 trillion between 2025 and 2030 to fund rising demand, grid upgrades, and modernisation - equivalent to the sector's investment over the prior 12 years.<sup>9</sup>

Capital at Risk. All financial investments involve an element of risk. Therefore, the value of your investment and the income from it will vary and your initial investment amount cannot be guaranteed.



FUND DETAILS

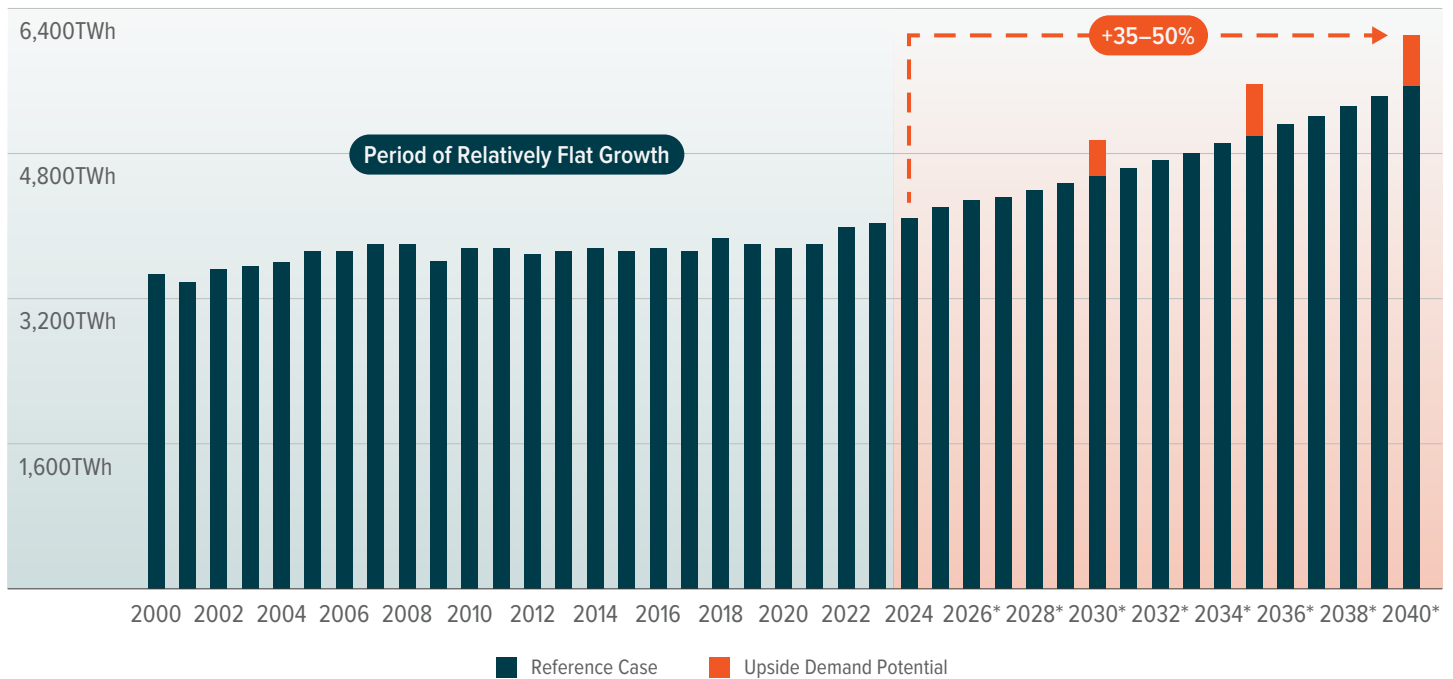
Inception Date	5 May 2026
Total Expense Ratio	0.47%
Ongoing Charges	0.47%
Primary ISIN	IE00070SLDT6
Primary Ticker	ZAPP LN
SFDR Classification	Article 6
Underlying Index	Mirae Asset U.S. Electrification UCITS Index

FUND INVESTMENT APPROACH

- The Global X U.S. Electrification UCITS ETF (ZAPP) seeks to provide exposure to companies that potentially stand to benefit from the increased electricity demand and electrification within the United States. This includes companies that are involved in conventional electricity generation, transmission, and distribution; alternative electricity generation and technology solutions; and the modernisation, development, manufacturing, or implementation of grid infrastructure and smart grid technology.
- Mirae Asset Global Indices has identified the following three sub-themes that aim to collectively capture the most relevant themes from the U.S. Electrification value chain:
  - Conventional Electricity**
  - Alternative Electricity**
  - Grid Infrastructure and Smart Grid Technologies**
- Holdings are separated into Significant-, Pure- and Diversified-Play. **Significant-Play** are those companies earning greater than or equal to 75% of revenue attributable to one of more of the core businesses of the sub-themes in aggregate.
- Pure-Play** are those companies earning greater than or equal to 50% of revenue attributable to one of more of the core businesses of the sub-themes in aggregate.
- Diversified-Play** are those companies earning between 25% and 50% of revenue attributable to one of more of the core businesses of only that applicable sub-theme.
- Constituent are determined based on their free-float market capitalisation. Individual weights are capped at 4%, and the aggregate weight of the Diversified Play are capped at 20%.
- The index is reconstituted and rebalanced on a semi-annual basis.

A STRONG DEMAND GROWTH OUTLOOK AFTER 20 YEARS OF FLAT GROWTH?

Source: Global X ETFs illustration with information derived from BloombergNEF, Apr 2025.



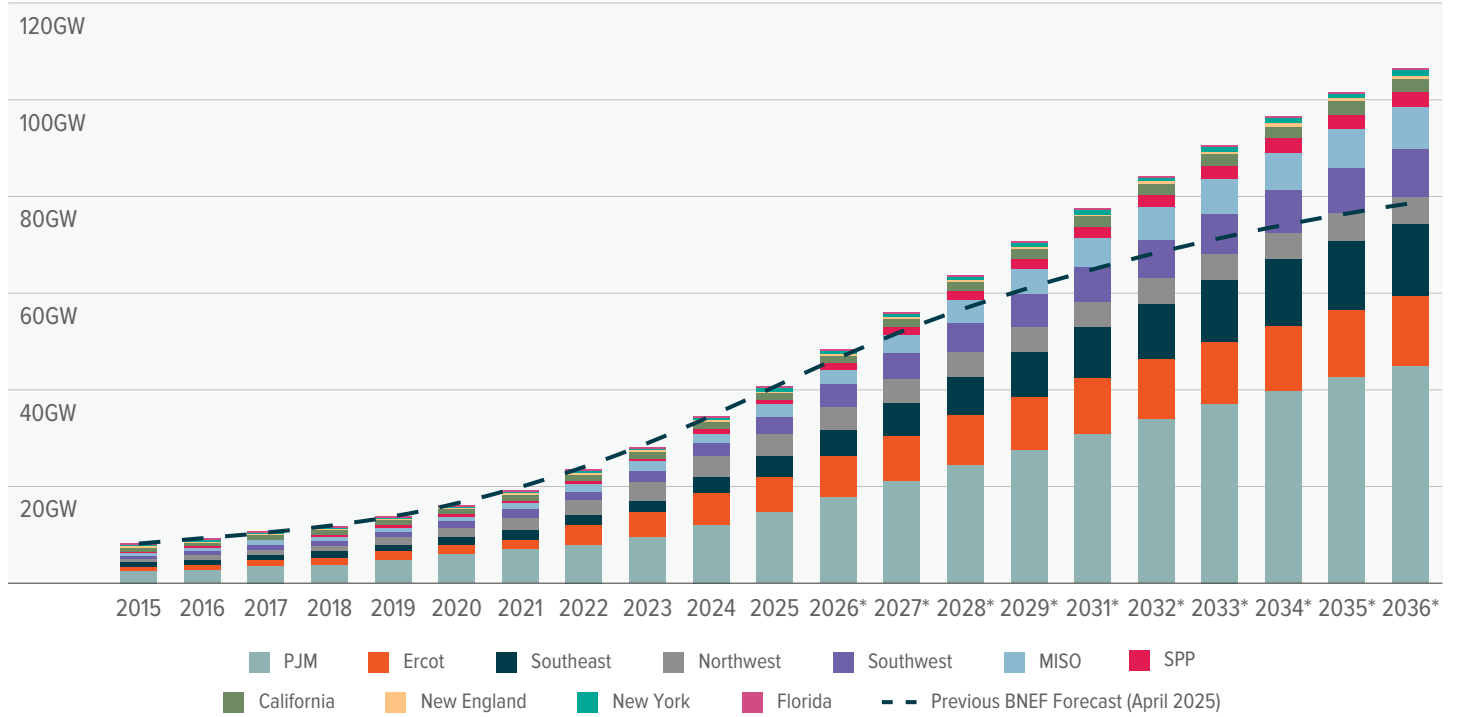
\*Forecast.

There is no guarantee that any trends observed in this material will continue. Any views and opinions are based on current market conditions and are subject to change. Past performance is not a guide to future returns.



## US DATA CENTRE POWER DEMAND

Source: Global X ETFs illustration with information derived from BloombergNEF, AI and the Power Grid: Where the Rubber Meets the Road, December 2025.



\*Forecast.

Note: “Power demand” and “average hourly electricity demand” refer to the total electricity used by the entire data center facility. SPP refers to Southwest Power Pool, MISO is Midcontinent Independent System Operator and Ercot is Electricity Reliability Council of Texas. There is no guarantee that any trends observed in this material will continue. Any views and opinions are based on current market conditions and are subject to change.

Prospectuses and Key Investor Information Documents (KIIDs) for this ETF are available in English at [www.globalxetfs.eu/funds/zapp/](http://www.globalxetfs.eu/funds/zapp/)  
 For more information on the Index, please visit [Mirae](http://Mirae)



- 1 Department of Energy, 2026
- 2 IEA, "Energy Demand from AI", 2024
- 3 BloombergNEF, 2026
- 4 IEA, "Smart Grids", 2023
- 5 Wood Mackenzie, "The grid edge: what you need to know", 2026
- 6 Polytechnique Insights, November 2024
- 7 American Clean Power, US National Power Demand Study, March 2025
- 8 Energy.gov, December 2024
- 9 Deloitte, February 2025

## Disclosures

The Global X UCITS ETFs are regulated by the Central Bank of Ireland.

This is a marketing communication. Please refer to the relevant prospectus, supplement, and the Key Information Document ("KID") of the relevant UCITS ETFs before making any final investment decisions. Investors should also refer to the section entitled "Risk Factors" in the relevant prospectus of the UCITS ETFs in advance of any investment decision for information on the risks associated with an investment in the UCITS ETFs, and for details on portfolio transparency. The relevant prospectus and KID for the UCITS ETFs are available in English at [www.globalxetfs.eu/funds](http://www.globalxetfs.eu/funds).

Investment in the UCITS ETFs concern the purchase of shares in the UCITS ETFs and not in a given underlying asset such as a building or shares of a company, as these are only the underlying assets that may be owned by the UCITS ETFs.

A UCITS ETF's shares purchased on the secondary market cannot usually be sold directly back to a UCITS ETF. Investors must buy and sell shares on a secondary market with the assistance of an intermediary (e.g. a stockbroker) and may incur fees for doing so. In addition, investors may pay more than the current net asset value when buying shares and may receive less than the current net asset value when selling them. Changes in exchange rates may have an adverse effect on the value price or income of the UCITS ETF. Past performance of a UCITS ETF does not predict future returns. Future performance is subject to taxation which depends on the personal situation of each investor, and which may change in the future. Neither past experience nor the current situation are necessarily accurate guides to the future growth in value or rate of return of a UCITS ETF. Investment may be subject to sudden and large falls in value, and, if it is the case, the investor could lose the total value of the initial investment. Income may fluctuate in accordance with market conditions and taxation arrangements. The difference at any one time between the sale and repurchase price of a share in the UCITS ETF means that the investment should be viewed as medium term to long term.

Any investment in a UCITS ETF may lead to a financial loss. The value of an investment can reduce as well as increase and, therefore, the return on the investment will be variable. Global X ETFs ICAV is an open-ended Irish collective asset management vehicle issuing under the terms of its prospectus and relevant supplements as approved by the Central Bank of Ireland and is the issuer of certain of the ETFs where stated.

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### Information for Investors in Switzerland

This is an advertising document. The state of the origin of the fund is Ireland. In Switzerland, the representative is 1741 Fund Solutions AG, Burggraben 16, CH-9000 St.Gallen. The paying agent is Tellco Bank Ltd, Bahnhofstrasse 4, 6430 Schwyz. The prospectus, the key information documents, the articles of association as well as the annual and semi-annual reports may be obtained free of charge from the representative. Past performance is no indication of current or future performance. The performance data do not take account of the commissions and costs incurred on the issue and redemption of units.