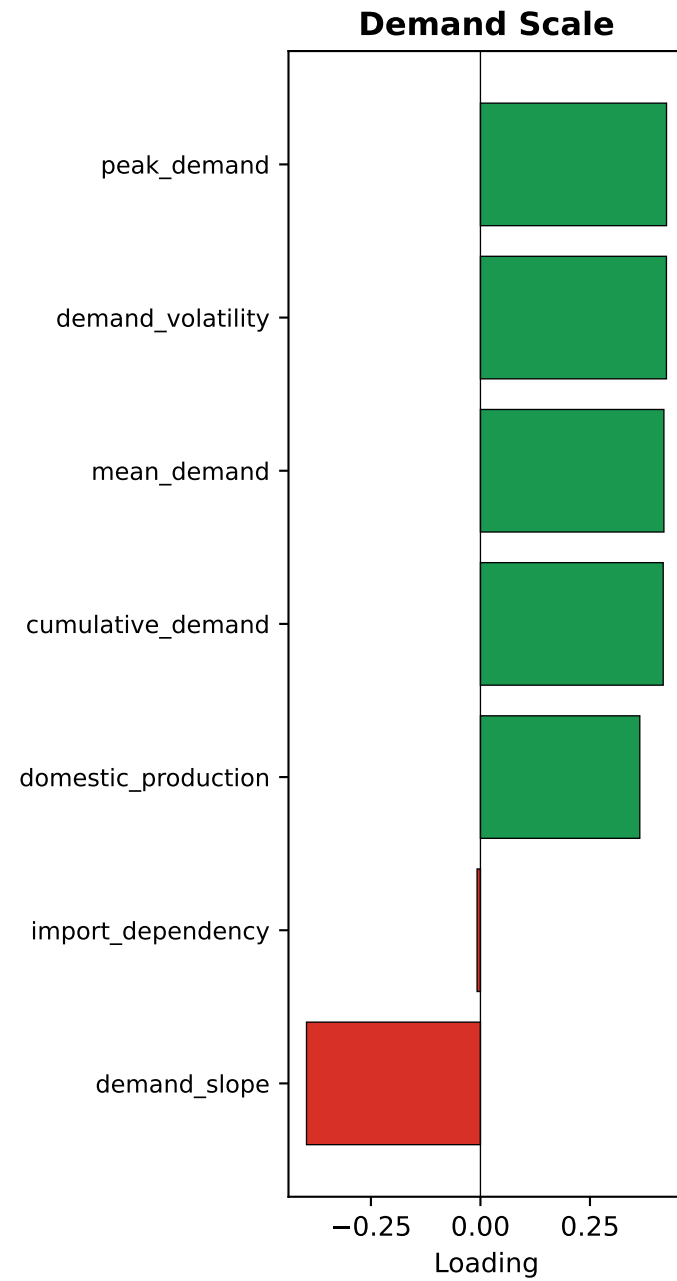
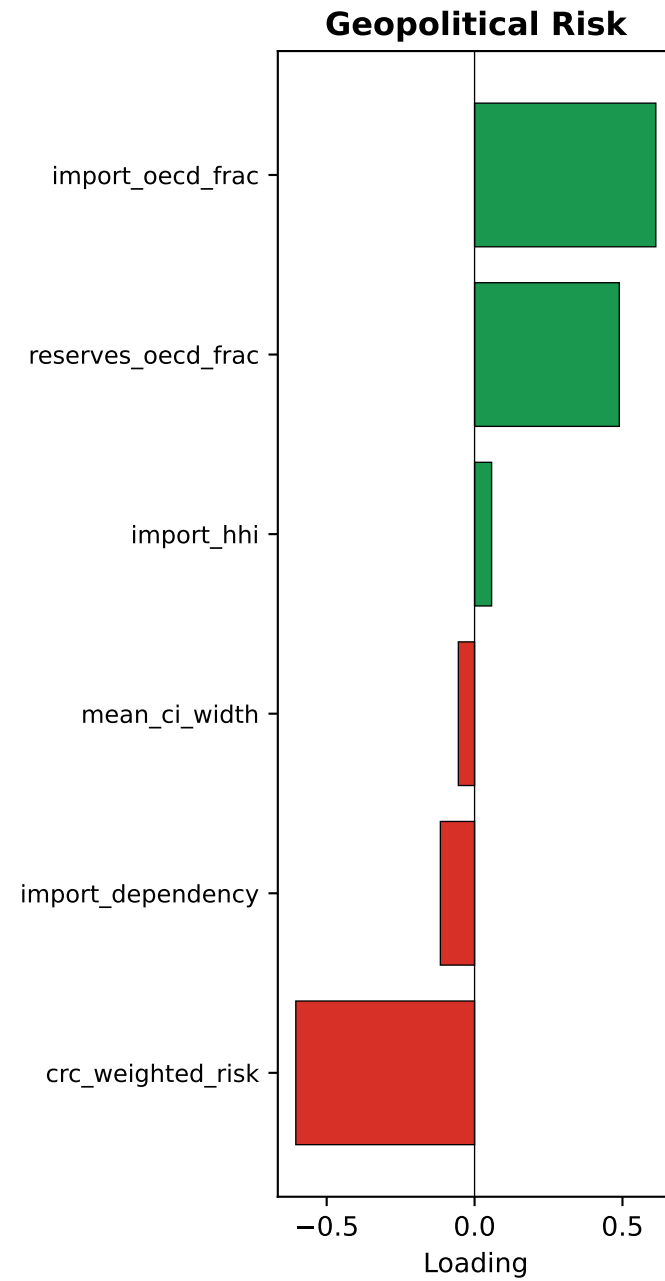


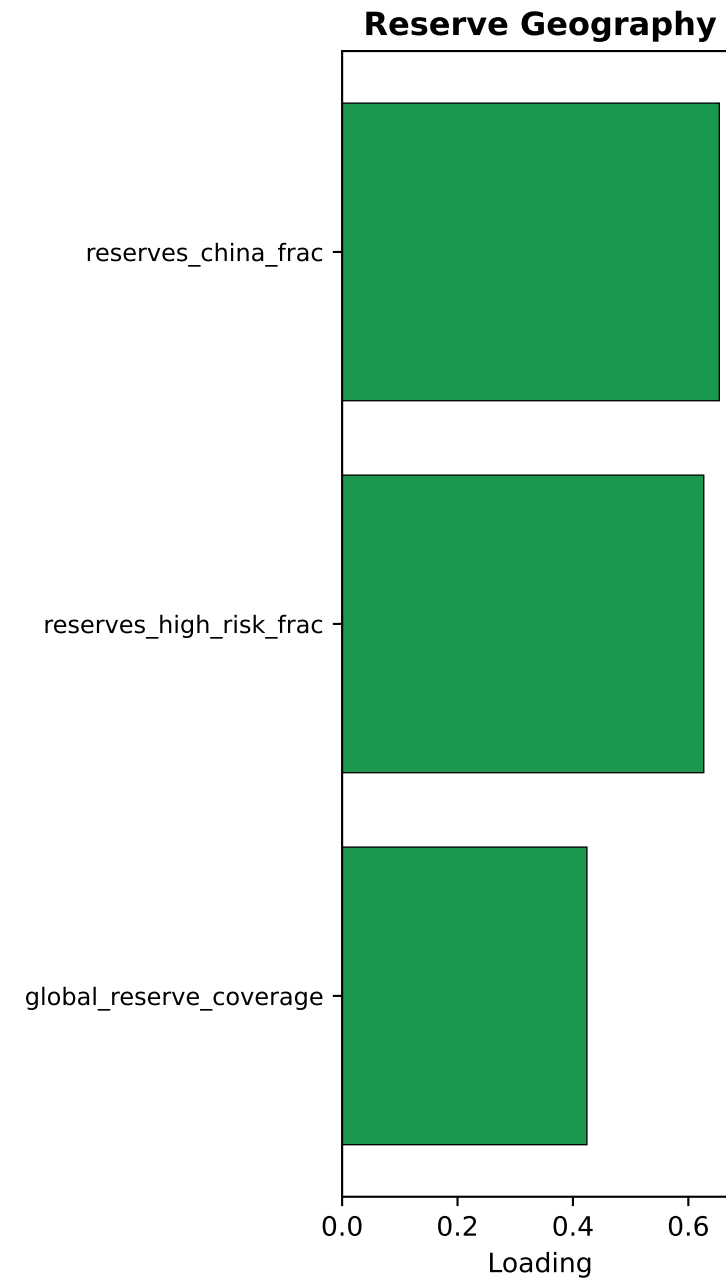
Sparse PCA Component Interpretation — Materials



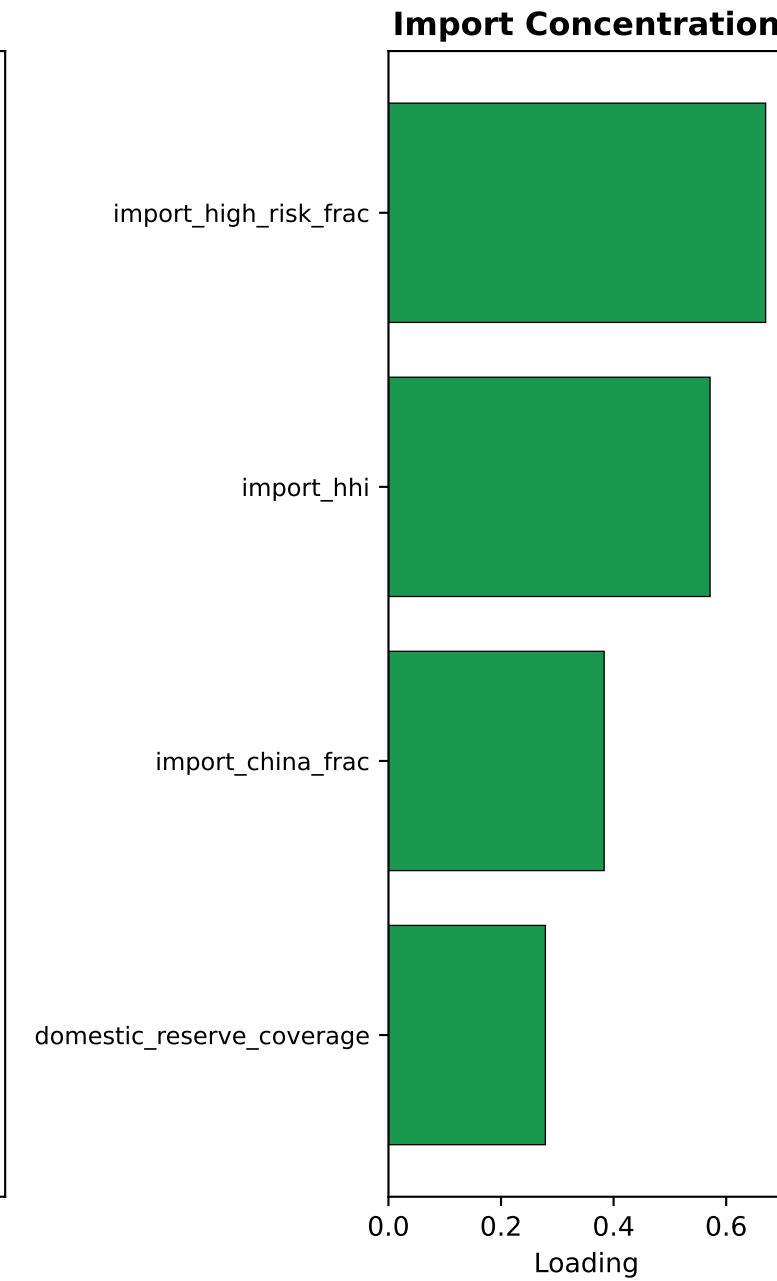
High demand magnitude
(peak, mean, volatility)



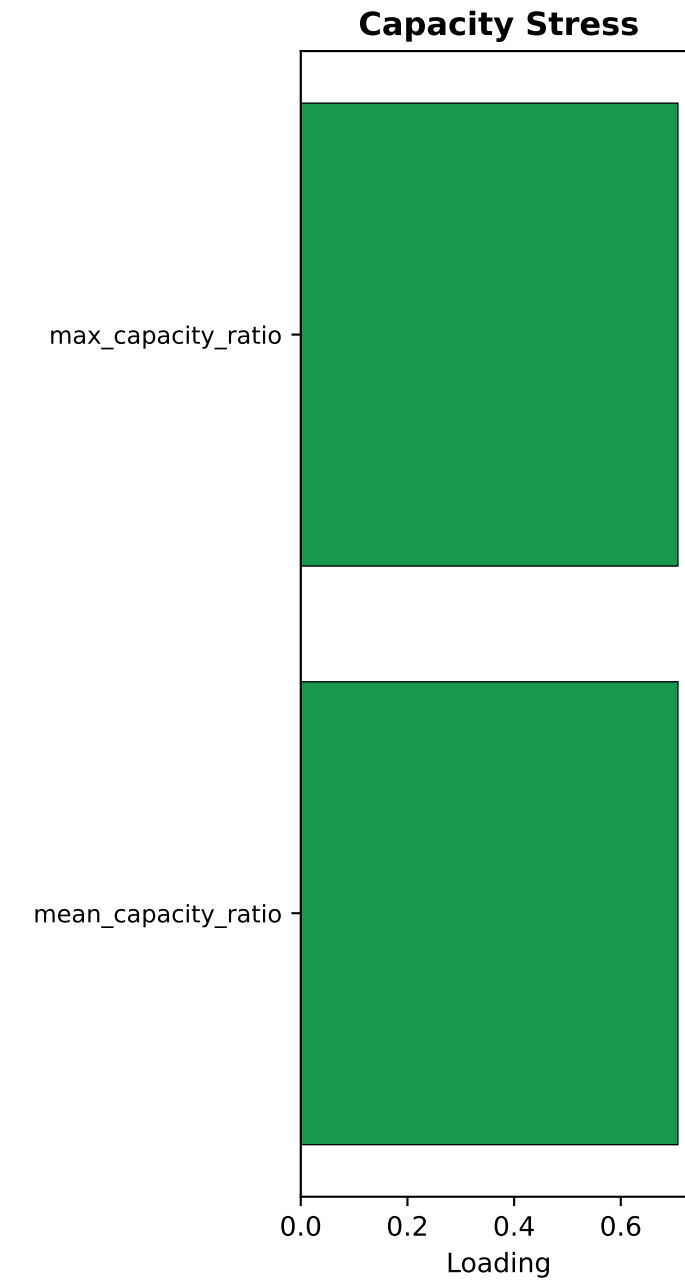
Supply from risky regions
vs. OECD sources



Reserves in China/
high-risk countries



Concentrated imports
from few suppliers



Demand vs. production
capacity ratio