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<https://www.benzinga.com/news/25/10/48356705/clean-energy-stocks-beat-nvidia-under-trump>

## Trump Wanted Clean Energy Dead—It's Crushing Nvidia And AI Instead

Ten months into Donald Trump's second term, the sector he's fought hardest to undercut is turning out to be one of the year's most explosive trades on Wall Street—and it's doing [better than artificial intelligence](#).

Despite a White House agenda that includes scrapping clean energy tax credits and halting solar and wind projects on federal lands, investors are doubling down on renewables.

The Invesco WilderHill Clean Energy ETF (NYSE:[PBW](#)) is up 44% year-to-date, beating out by about 10 percentage points the ... Semiconductor ETF and even Nvidia Corp.

(NASDAQ:[NVDA](#)), which is riding the AI wave.



## 10 Clean Energy Stocks Soaring Over 140% In 2025

A look under the holdings of PBW shows that ten stocks have posted triple-digit rallies since January 2025 through Oct. 2022:

- MP Materials Corp. (NYSE:[MP](#)): +338%. A supplier of rare earth materials critical to EVs and wind turbines.
- Bloom Energy Corp. (NYSE:[BE](#)): +331%. Specializes in hydrogen and fuel cell power generation systems.
- Amprius Technologies Inc. (NYSE:[AMPX](#)): +308%. Produces advanced lithium-ion batteries for aviation and EVs.

- Navitas Semiconductor Corp. (NASDAQ:[NVT](#)): +289%. Develops next-gen power chips for solar and energy storage.
- Eos Energy Enterprises Inc. (NASDAQ:[EOSE](#)): +211%. Builds zinc-based grid-scale battery storage systems.
- Solid Power Inc. (NASDAQ:[SLDP](#)): +203%. Focused on solid-state battery technologies for EVs.
- SolarEdge Technologies Inc. (NASDAQ:[SEDG](#)): +178%. A solar power equipment firm and inverter manufacturer.
- Standard Lithium Ltd. (NYSE:[SLI](#)): +172%. Developing direct lithium extraction for EV battery supply chains.
- QuantumScape Corp. (NYSE:[QS](#)): +171%. Aiming to commercialize solid-state batteries.
- Nextracker Inc. (NASDAQ:[NXT](#)): +136%. Designs solar tracker systems to boost solar energy output.

## Trump Called Solar And Wind ‘The Scam of the Century’

Trump has been vocally hostile toward renewable energy projects, calling them "the scam of the century" and vowing to scrap tax incentives and block new developments on federal lands.

Still, developers are not slowing down. According to a recent [New York Times report](#), many clean energy firms are racing to install projects before tax benefits expire or become more difficult to claim.

And that urgency is creating a near-term boom.

The U.S. is expected to add record—or near-record—amounts of renewable capacity through 2027. The Energy Information Administration estimates that 93% of the new capacity added to the U.S. grid this year will come from renewable sources and batteries.

"We have never seen this kind of demand, ever," said ...

## \$2.2 Trillion Says This Isn't Just A Fad

According to ... , global investment in clean tech is expected to reach \$2.2 trillion in 2025, accounting for two-thirds of all energy spending. That includes ....

The International Energy Agency (IEA) expects electricity's share of final energy use to jump from 20% today to at least 30% by 2050, driven by electrified transport, industrial decarbonization and smart infrastructure.

With clean energy now absorbing two-thirds of global energy capital flows, the transition is no longer a climate trend—it's the defining investment cycle of the coming decade.