

Excerpt from Zacks, October 15, 2025

Also in Yahoo Finance, <https://finance.yahoo.com/news/renewable-energy-etfs-pace-see-102500395.html>

Renewable Energy ETFs on Pace to See Best Year Since 2020: Here's Why

Renewable energy stocks and exchange-traded funds (ETFs) have gained immensely in recent times. **Invesco WilderHill Clean Energy ETF** PBW has added over 7% on Oct. 13, 2025, advanced 28.8% over the past month and surged 126.2% over the past six months (as of Oct. 13, 2025).

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Easing Policy Concerns

U.S. President Donald Trump's "One Big Beautiful Bill" initially created uncertainty for renewables, but the outcome was less severe than feared, providing a much-needed breather to the sector.

The "One Big Beautiful Bill" phased out tax credits for new wind and solar projects unless construction begins by July 4, 2026. Under the new guidance, smaller projects such as rooftop solar installations will continue to benefit from the 5% "safe harbor" rule, which allows developers to qualify for tax credits if they have invested at least 5% of the project's total cost and complete construction within four years, ...

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How the AI boom is shaping the future of renewable energy, can be understood from the example of Bloom Energy's (BE) stock. The BE stock jumped 26.5% Oct. 13, 2025, thanks to a deal with Brookfield to put fuel cells in AI data centers, as quoted on CNBC. The BE stock surged about 29.4% over the past five days.

Bloom has already placed hundreds of megawatts of fuel cells through deals with utilities, including

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China to Control Capacity?

Chinese solar stocks rose on Oct. 14, 2025, as state media reported that authorities were planning to strengthen controls on solar production

capacity. The move has been taken to control the supply glut in the industry, ...

Cheaper Valuation of Clean Stocks

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Fed Rate Cuts to Benefit Clean Stocks?

The Fed has enacted its first rate cut of 2025 in September. The Fed may cut rates further this year. Lower borrowing costs are a positive for capital-intensive renewable projects. We will probably not see the return of ultra-low levels of rates seen in 2020, but the decline in the present levels is also a positive.