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Also in Yahoo Finance, <https://finance.yahoo.com/news/green-etfs-crosshairs-navigating-rare-152000882.html>

Are Green ETFs in the Crosshairs?

Navigating the Rare Earth Supply Shock

The escalating geopolitical tensions between the United States and China have thrust a spotlight on rare earth materials, a group of 17 critical minerals that are indispensable for modern energy technologies, particularly the rapidly expanding clean energy industry. China's recent move to tighten its grip on the export of these minerals presents a significant risk to global supply chains and casts a shadow of uncertainty over ...

Why Green Energy?

Rare earth minerals like Neodymium, praseodymium, dysprosium, and terbium are critical components in the permanent magnets used in wind turbines and high-efficiency electric vehicle (EV) motors. Other clean energy components, like advanced power storage batteries and

Green ETFs to Keep on Watchlist

The following clean energy ETFs include clean energy companies that have global exposure in terms of operations, including Asia, and thus may offer an investor the required protective shield against current market disruption. Impressively, these ETFs have gained significantly since April, when China announced export restrictions on the first set of seven rare earth minerals, reflecting their resilience against supply-chain vulnerability.

Invesco WilderHill Clean Energy ETF (PBW)

This fund offers exposure to a broad range of clean energy companies. Its top five holdings include Navitas Semiconductor (2.38%) and Fluence Energy (2.35%). Navitas (NVTX) has a significant portion of sales and operations in Asia, particularly China, which accounted for 60% of its revenues in 2024. Fluence (FLNC) has established a strong presence across key markets in Asia-Pacific region, including Australia, Taiwan, ...

PBW has surged 92.5% since April 1. The fund charges 64 basis points (bps) as fees.

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