

Excerpt from Barron's, May 26, 2026

Add Solar to Your Subscription Bill? These Companies Are Banking On It.

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Barron's Energy Roundup

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Renewapalooza ↑ Clean energy stocks are rallying as investors start to see the group less as a climate play and more as a “fast energy” trade.

The ... and Invesco WilderHill Clean Energy ETF both rose more than 3% last week and are up more than 30% this year, putting them in league with traditional energy ETFs such as the ... and the

The U.S. needs electricity faster than utilities, grid operators, and gas-turbine makers can supply it. Clean tech is among the fastest ways to add electricity, and it's outcompeting gas in places you wouldn't expect.

Texas is now the poster child for renewables growth with solar and wind supplying nearly 54% of grid power this year. Gas-fired generation fell below 35%, down from more than 40% two years earlier.

In Texas, ... renewables have an opening to “edge out gas” because they're cheaper and faster to deploy, allowing them to beat gas to market and push gas toward peaking capacity and co-located data-center power.

Texas power prices are also too low to attract much more gas-fired generation; they have been in the \$30 to \$40/megawatt-hour range, well below the \$78 to \$100 levels needed to make new projects profitable,

Batteries are also getting more efficient, allowing for more reliable renewable generation. U.S. developers installed a record 9.7 gigawatt-hours of storage capacity in the first quarter, up 32% from a year earlier, according to

Batteries don't eliminate the need for gas, but they make solar and wind more useful when the grid is strained.

[Bloom Energy](#) embodies the fast-energy trade. The company's fuel cells generate electricity without combustion, which Bloom says lowers carbon emissions and virtually eliminates pollutants such

Bloom's shares [rose again this past week](#) after cloud computing darling [Nebius](#) agreed to use Bloom fuel cells for 328 megawatts of installed capacity expected to be operational this year. Bloom stock is now up 200% this year and around 1,600% over the past 12 months. It's a sign investors will snap up anything that can solve AI's power bottleneck.

Stocks and ETFs impacted: ... [Invesco WilderHill Clean Energy ETF \(PBW\)](#)...