

Excerpt from Zacks, March 30, 2026

<https://finance.yahoo.com/sectors/energy/articles/zacks-analyst-blog-icln-qcln-090500121.html>

also in Yahoo Finance

## The Zacks Analyst Blog ... PBD and PBW

Zacks.com announces the list of stocks featured in the Analyst Blog. Every day the Zacks Equity Research analysts discuss the latest news and events impacting stocks and the financial markets. Stocks recently featured in the blog include ..., Invesco Global Clean Energy ETF PBD and Invesco WilderHill Clean Energy ETF PBW.

### **Here are highlights from Monday's Analyst Blog:**

#### **From Oil Disruption to Clean Energy Boom: ETFs Poised to Benefit**

Since the onset of the Middle East conflict, oil prices have surged amid persistent supply constraints. The closure of the Strait of Hormuz and damage to critical energy infrastructure in the region have further intensified the rally, plunging global energy markets into turmoil.

Oil prices are likely to remain elevated even if tensions ease, as repairs to key infrastructure could take time, constraining near-term production capacity. This prolonged supply tightness is expected to keep energy security at the forefront of concerns for global economies.

The ongoing disruptions in fossil fuel markets, coupled with rising energy security concerns, are expected to drive increased global investment in clean energy, likely renewing investor interest in U.S. clean energy funds. This dynamic is likely to support continued capital flows into companies, driving the energy transition.

#### **Why Clean Energy Investment Is Poised to Accelerate**

Uncertainty around energy security is poised to emerge as a key catalyst driving the increased focus on clean energy. With the Middle East conflict persisting longer than expected and continued ambiguity surrounding diplomatic progress between Washington and Tehran, global economies are likely to seek alternative solutions to meet their energy needs, potentially benefiting the clean energy sector. The Middle East conflict has underscored the risks of fossil fuel dependence, leading to increased calls from climate advocates to scale up renewable energy capacity and strengthen energy independence.

According to the Guardian, the expansion of clean energy technologies has improved resilience to the ongoing fuel crisis in certain countries, with Spain and Portugal witnessing a recent decline in electricity prices.

### **Clean Energy Momentum Set to Build on Record Investment Levels**

The momentum driven by the Middle East conflict is expected to build on last year's clean energy surge. According to the International Energy Agency's head, as quoted on CNBC, the energy transition was already on a strong footing pre-conflict in the Middle East, but the energy shock is set to accelerate clean energy investment further.

Per BloombergNEF's annual Energy Transition Investment Trends report, published in late January this year, global investment in the energy transition reached a record \$2.3 trillion last year, marking an 8% increase from the prior year.

Per the report's base-case Economic Transition Scenario, global energy transition investment is expected to average \$2.9 trillion annually over the next five years. According to the report, clean energy investment outpaced fossil fuels for a second year in 2025, with the gap widening to \$102 billion from \$85 billion in 2024.

### **Clean Energy ETFs in Focus**

These clean energy ETFs appear poised to capitalize on the sector's growing momentum. Investors should maintain a long-term investment horizon.

Investors can consider .... , Invesco Global Clean Energy ETF, and Invesco WilderHill Clean Energy ETF.