

Excerpt from Investopedia, May 15, 2020

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Where to Invest Now: Advice from Top Strategists

Where investing strategists see opportunities in the present market.

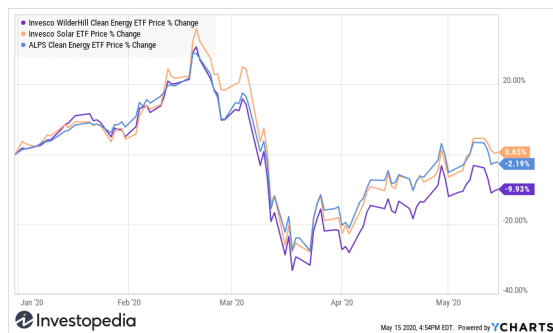
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Wind & Solar Worth a Look

"Many people have feared that record cheap oil prices would delay progress towards reducing the global carbon footprint. We think the opposite will happen. Increased awareness of environmental issues is a potential silver lining to the COVID-19 tragedy, which we think will support demand for clean energy. On the supply side, the recession will rationalize capacity in areas such as wind and solar, and pricing should improve. We have spent time discussing these themes with all of the major oil companies and they remain enthusiastic about their long-term investment in alternative energy projects."

"Clean energy has been an important long-term theme in our equity portfolios and we have been underweight carbon-based assets and overweight alternative energy solutions for many years. In the current environment, we see opportunities in renewables, clean power generation and in companies that produce components of the clean energy supply chain. In renewables—fuels that can replace gasoline and diesel fuel—the market continues to see tight supply and good demand."



Source: YCharts and Investopedia

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