Excerpt from Motley Fool, January 2, 2012
http://beta.fool.com/kirkydu/2012/01/02/galp-energized-biggest-losers-2011/?source=eogyholnk0000001

GALP Energized by 2011's Biggest Losers

Sometimes investments are low priced because they ought to be low priced. Rarely however does an entire sector get battered and stay on the mat too long. Usually there is at least some reversion to the mean. In 2011, several energy related industries got outright slaughtered with losses of 30% or more. Some are already poised for comebacks and some will take time but have huge upsides. Here's a look at a few that qualify as Growth At Low Price investments today.

The naysayers will hammer me for these two ETFs, so let's put them right out in the sun. The … **Solar Energy ETF** and … **Solar ETF** were both down just over 63% in 2011. These were both tremendous short positions in 2011 as the solar industry began a monumental margin contraction and consolidation that crushed share prices.

The carnage has created an interesting play. If … and … can regain their highs of 2011, that would imply an investment upside of about 200%. That's quite a heady return just for getting back to a land you have already been in. In fact, both ETFs have traded higher than their 2011 highs further back when cash flowed like water from Lake Michigan to the Chicago River. What's the argument for a big turnaround in solar?

In short, demand is continuing to grow at a very fast pace while costs continue to plunge. Consolidation in the industry will eventually allow the strong to come out of this price per share annihilation even stronger. ….

Read this article from a fellow Fool for more details of the goings on in solar. The **WilderHill Powershares Clean Energy** (AMEX: PBW) also go hammered due to a large correlation with the solar ETFs.

PBW however contains a more diverse group of clean energy companies, including companies in geothermal, wind, battery and biomass. For the investor who does not want a pure solar play, but understands that alternative energies are on the cusp of wider adoption, this one trades with good volume and offers a potential return in excess of 100% if it reaches its 2011 high again.

Next on the energy front we have two ETFs related to ….

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All of the funds listed are poised to do well in an economic recovery. If you believe that monetary expansion will lead to inflation, then each has another catalyst. If I am right that the financial world is not ending, then any of these funds can take a place in your portfolio. I would have more than one.