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# Red stocks, blue stocks

*Investor Daily: Here's how to choose a presidential portfolio.*

By Jon Birger, senior writer

NEW YORK (Fortune) -- Does your faith in your candidate extend to your investment portfolio? If so, this column is for you.

While Barack Obama, John McCain and their respective supporters may argue over who would be a better president for the stock market, there are specific investments for which no debate is necessary.

The candidates' policy proposals so favor or so disfavor particular companies and industries that the outcome of the election (assuming we have a clear winner) is almost certain to have an impact when markets open Wednesday - though given the country's fiscal and economic condition, how long any victory glow lasts is another question entirely.

Let's start with the blue stocks - investments most likely to benefit from an Obama win and from Democratic gains in the House and Senate.

**PowerShares WilderHill Clean Energy Portfolio.** The case for buying this exchange traded fund, which owns shares in alternative energy companies, is simple. Obama has said that his top priority as president will be ending U.S. dependence on Middle Eastern oil, and that the path to freedom lies in investing \$150 billion over the next 10 years in renewable energy. He also wants to require

utilities to generate 10% of their electricity from renewable sources.

All of this adds up to a potential bonanza for the solar, wind, biofuel and other companies included in the PowerShares WilderHill (**PBW**) ETF. Best of all you'd be buying low: the ETF's price has sunk from \$29 to \$10 a share since last December.

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