Optical modules and computing power ETF

Overview

Top Optical Components Stocks and ETFs to BuyDiscover the best Optical Components stocks and ETFs to buy now. Ranked by Danelfin AI based on their probabil.

Key Takeaways

Key ETFs for optical modules and AI computing include the Corgi Lithography & Semiconductor Photonics ETF (EUV) and Tuttle Capital Pure Play Photonics ETF (FOTO), offering targeted exposure to photonics and high-performance computing infrastructure. Overview of Optical Module and Photonics ETFsOptical modules and photonics are critical for AI data centers, high-speed networking, and semiconductor manufacturing.

ET

Fs in this space provide investors with exposure to companies producing optical transceivers, lasers, fiber-optic components, and photonic integrated circuits.

These ET

Fs are often actively managed and focus on the AI infrastructure bottleneck, where high-bandwidth optical connections replace traditional copper-based links. Notable ETFsCorgi Lithography & Semiconductor Photonics ETF (EUV)Actively managed, invests in lithography, semiconductor photonics, optical components, and AI infrastructure technologies. Top holdings include Taiwan Semiconductor Manufacturing (TSM) 10%, ASML Holding (ASML) 8%, Lam Research Corp (LRCX) 5%.

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Offers broader exposure with around 40 holdings, including extreme ultraviolet lithography, fiber-optic networking, imaging, sensing, and lidar. Annual expense ratio: 0. 35%.

Tuttle Capital Pure Play Photonics ET

F (FOTO)Focuses on pure-play photonics companies, targeting optical technologies for AI data centers. Top holdings include Lumentum Holdings (LITE) 14%, IPG Photonics Corp (IPGP) 12%, Fabrinet (FN) 11%. Smaller, more concentrated portfolio with 16 holdings, emphasizing high-growth optical module companies.

Other Photonics ETFsAdditional ETFs have been filed or launched by REX, Roundhill, KraneShares, Tema, Defiance, and the proposed Aura AI Photonics ETF, which would track the VettaFi AI Photonics Index.

Market Context

The global optical module market is projected to reach $51 billion in 2026, with demand for 800G+ modules exceeding 52 million units, reflecting a 101% year-over-year growth.

ET

Fs in this sector are highly volatile, especially leveraged versions, and are generally suited for short-term tactical trading rather than long-term holding. Active management allows these ETFs to adjust holdings based on AI infrastructure trends, including hyperscale data center deployments and semiconductor manufacturing cycles.

Investment Considerations

Volatility: Leveraged ETFs like those tracking Lumentum (LITE) or Coherent (COHR) can experience significant daily swings. Diversification: EUV provides broader exposure across 40 companies, while FOTO is more concentrated on pure-play photonics. Thematic Focus: Both ETFs target the AI and high-performance computing ecosystem, making them suitable for investors seeking growth from AI infrastructure expansion.

Investors interested in optical modules and computing power ETFs should consider their risk tolerance, investment horizon, and preference for concentrated vs. diversified exposure within the photonics and AI infrastructure sector.

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Article Content

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Tema''s LAZR ETF offers access to the growth of photonics and optical technologies, enabling faster data movement for AI and unlocking high capacity.

Best Optical Stocks and ETFs to Buy According to

Discover the best Optical stocks and ETFs to buy now. Ranked by Danelfin AI based on their probability of beating the market. Updated daily.

Top Silicon Photonics Stocks 2026: Breaking the Copper Wall

Watchlist of silicon photonics stocks: Co-packaged optics replacing electrical I/O to slash latency and power consumption in AI data centers.

7 Best Semiconductor ETFs to Buy for 2026

Investor demand for concentrated semiconductor exposure has driven explosive growth in a subset of increasingly specialized thematic ETFs.

Optical stocks are booming. Here''s how to invest in one of the most ...

Investors are pouring money quickly into a new ETF that invests in companies involved with photonics and photolithography. Extreme ultraviolet (EUV) lithography is a high-growth specialty

List of Leveraged Photonics ETFs

There are only a handful of leveraged ETFs targeting the photonics names that power AI datacenter interconnect and EUV lithography. Here''s the full lineup.

Dram and mags ETF issuer targets AI photonics with new optical

Roundhill is signaling a bold bet on the intersection of artificial intelligence and photonics by filing for a new exchange-traded fund focused on optical components and light-based technologies.

Retail Leader Serenity vs. New Star Leopold: How Two Top Hunters

Over the past two years, Serenity has focused on Co-Packaged Optics (CPO). He believes that as AI clusters scale, traditional copper connections and pluggable optical modules will

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Defiance ETFs Launches POET 2X Long ETF for Active Traders

New ETF Launch: Defiance ETFs has launched the Defiance Daily Target 2X Long POET ETF (POEL), aimed at providing active traders seeking amplified returns, particularly for short-term

Quantum Computing Companies In 2026: The Complete List

A complete directory of quantum computing companies in 2026 — IBM, Google, Microsoft, Quantinuum, IonQ, Rigetti, D-Wave Quantum Inc., QuEra, Atom Computing, PsiQuantum

5 SGX-Listed ETFs Surge Over 50% in a Year — One Even Doubled

Global leaders in optical transceivers such as Zhongji Innolight and Eoptolink experienced massive multiple expansion. As global tech hyperscalers ramped up orders for high-speed 800G and

GigaDevice Expands Optical Communication Portfolio with New

To further support the advancement of high-speed optical interconnect technologies and expand its optical communication product portfolio, GigaDevice has introduced the new GD32E512

Lumentum Holdings (NASDAQ:LITE) rises as AI optics push lifts stock ...

Power and bandwidth are less talked about, but key drivers here, not only broad “AI demand.” Lumentum said at the Rome AI conference, which ended Saturday, that its optical circuit

AAOI, LITE, COHR, MRVL Stocks Bounce Back Overnight: Why

Tech and semiconductor stocks dropped in regular trading on Tuesday, taking a breather after an early-week rally fueled by the U.S.-Iran peace deal.

Global AI Compute Investment Spurs Surge in Optical Module Market

Executive Narrative Global AI compute investment drives optical module market to $23.8B in 2025, with forced upgrades to 800G/1.6T modules boosting Chinese companies and AI ETF

AI ETFs: The Next Wave Emerges

ProShares filed for the ProShares AI Computing Power ETF, along with leveraged and inverse versions, which would seek exposure primarily through GPU compute futures contracts.

AI ETFs: The Next Wave Emerges

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Leverage Shares filed for both an unlevered Computing Power ETF and a 2x version, while Volatility Shares filed unlevered, 2x, -1x, and -2x AI Computing Power ETFs. The filings show

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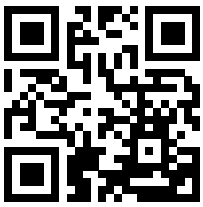

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