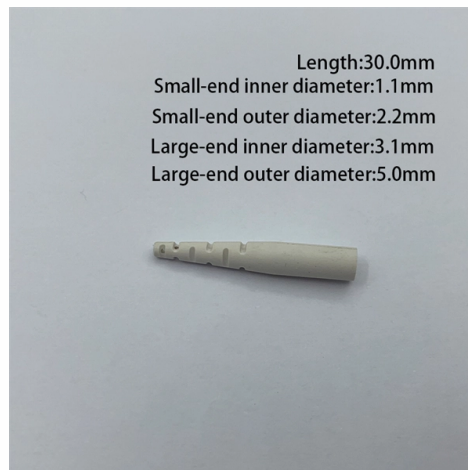


What are the CPO optical module ETFs



AI Overview

The main ETFs for optical modules and CPO exposure include the Corgi Lithography & Semiconductor Photonics ETF (EUV) and leveraged ETFs on Lumentum, Coherent, Applied Optoelectronics, and Corning. Key ETFs:

1. Corgi Lithography & Semiconductor Photonics ETF (EUV) Actively managed ETF targeting companies involved in lithography, semiconductor photonics, optical components, and AI infrastructure. Provides diversified exposure to the photonics and optical module sector. Expense ratio: 0.35% annually. Focused on capital appreciation through investments in companies like Lumentum, Coherent, and Applied Optoelectronics.
2. Leveraged Photonics ETFs Offer 2x daily exposure to specific photonics stocks, suitable for short-term tactical trading. Key underlying companies include: Lumentum (LITE) – optical components for AI datacenter interconnects. Both long and short leveraged ETFs exist. Coherent (COHR) – optical transceivers, lasers, and lithography components. Applied Optoelectronics (AAOI) – fiber-optic transceivers for hyperscale customers. Corning (GLW) – specialty glass, fiber optics, and display substrates; less pure-play but included in leveraged ETFs.

Market Context Optical modules and CPO are central to AI data center infrastructure, enabling high-speed data transfer between GPUs and switches. Nvidia's \$4 billion investment in Lumentum and Coherent highlights the strategic importance of these technologies. The optical transceiver market is projected to reach \$29 billion, while the broader data center network market could grow from \$45.8 billion in 2025 to \$103 billion by 2030.

Considerations Leveraged ETFs are volatile and intended for short-term trading, not long-term holding. EUV provides broader, diversified exposure with lower volatility compared to single-stock leveraged ETFs. Investors should consider expense ratios, liquidity, and risk when selecting ETFs in this sector. These ETFs provide a way to gain exposure to the growing optical module and CPO market, which is increasingly...

Article Content

Applied Optoelectronics, Inc. (AAOI) Stock Price Today—Real Time

Applied Optoelectronics, Inc. (AAOI) is a global technology firm specializing in the creation, production, and distribution of fiber-optic networking solutions. Its extensive product catalog features optical

AI photonics selloff sparks bullish calls on SIVE and AAOI

AI optics stocks AAOI (-13.9%), Coherent (-10.4%), Lumentum (-7.4%), and Sivers (-8.7%) slumped amid a broader semiconductor selloff, not company-specific issues. AI analyst

Co-Packaged Optics (CPO) Market Trends 2026: AI Data Center Optical ...

Explore the future of co-packaged optics (CPO) in AI data centers. Learn how silicon photonics, optical I/O, and high-speed optical interconnect technologies are shaping next-generation

AI Data Center Optical Transceiver Module Market 2025–2030

The AI data center optical transceiver market has entered a historic growth phase, driven by the exponential expansion of AI computing clusters and the accelerated migration from traditional copper

Source Photonics to Expand Optical Chip and Module Production

Notably, the Changzhou project is not DSBJ's only investment in the optical communications sector recently. Earlier this month, the company announced plans to build high

NVIDIA Unveils Silicon Photonics CPO Technology Transforming AI

CPO technology promises to reduce power consumption, improve scalability, and enhance efficiency, reshaping the future of AI infrastructure. Although pluggable optical modules

Optical Module Market Analysis And Forecast In 2026--ETU-LINK

AI computing power has driven explosive growth in the optical module market, with 800G and 1.6T technologies leading the industry transformation. Chinese companies occupy a dominant

Co-Packaged Optics (CPOs)

Optical modules are known to experience both hard and soft failures. Even with high-quality optics, hard failure rates are around 100 FIT, and soft failures—often caused by dust in the...

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.

Optical Module Investment Landscape 2026: Demand, Scarcity, CPO,

In late May 2026, AI optical modules are the most demand-certain link in the compute chain — and the easiest place to overpay. This piece first quantifies optical demand and the growth runway: the

What is Co-Packaged Optics (CPO) Technology? | Corning

Co-Packaged Optics (CPO) Solutions Co-Packaged Optics (CPO) Solutions Today, data centers use a separate approach for optics and electronics, in which optical modules are connected to switches

LPO vs. NPO vs. CPO: Next-Gen 1.6T Optical

Explore how LPO, NPO, and CPO technologies solve power and latency bottlenecks in 1.6T optical modules. Learn the key advantages of DSP-free architectures for

Co-Packaged Optics Market Size, Share and Growth Analysis

Co-packaged optics (CPO) is a technology that combines optical transceivers directly with electronic chips or application-specific integrated circuits (ASICs) within a single package.

CPO Optical Modules Surge Across the Board! Innolight Market Cap

Innolight (Zhongji Innolight), the leading optical module player, jumped over 7% intraday to hit a fresh all-time high, with its total market capitalization exceeding 730 billion yuan.

Which Optics Stock Has Dominated in 2026: Applied Optoelectronics ...

The optics complex has been one of 2026's most rewarding corners of the AI infrastructure trade, and the spread among the three leaders is surprisingly wide. Applied

What is Co-Packaged Optics (CPO) Technology? | Corning

Co-Packaged Optics (CPO) is a technology and design approach where optical components, such as lasers and photodetectors, are integrated alongside electrical components, like Application-Specific

Nvidia's \$4B Photonics Venture: What You Need to Know

While AI cluster scaling continues to expand, traditional pluggable optical modules are facing physical limits in power consumption and density. These pluggable transceivers are also

How Industry Collaboration Fosters NVIDIA Co-Packaged Optics

NVIDIA is developing a co-packaged optics (CPO) platform that integrates optical and electrical components to improve data-center connectivity, in collaboration with industry partners like

Co-Packaged Optics — a deep dive | APNIC Blog

Optical modules are known to experience both hard and soft failures. Even with high-quality optics, hard failure rates are around 100 FIT, and soft failures — often caused by dust in the

AI Optics Stocks Surge: LITE, AAOI Lead 2026 Boom

AI optical stocks like Lumentum, Applied Optoelectronics, and Coherent are outperforming the Nasdaq by up to 20x. Explore how AI data center demand drives massive gains, key risks, and how traders

Optical Communication Industry Trends 2026: AI, 800G/1.6T Optical ...

Explore optical communication industry trends in 2026, driven by AI infrastructure, 800G and 1.6T optical modules, silicon photonics, and next-generation data center connectivity solutions.

Co-Packaged Optics (CPO) 2025-2035: Technologies, Market

Co-Packaged Optics (CPO) presents a promising solution to these challenges. Unlike traditional pluggable models, CPO integrates optical modules directly onto the switch ASIC

Contact Us

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