

SOL04: Residential Solar Market Study

Executive Summary | February 01, 2026

Key Performance Indicators

2682K TOTAL CUSTOMERS	\$62.0B NET SUBSCRIBER VALUE	\$94M MONTHLY RECURRING REVENUE
35% STORAGE ATTACH RATE	243 MW MONTHLY INSTALLATIONS	94% CONTRACT RENEWAL RATE

Strategic Highlights

Customer Economics: Contract Length: 24 years Avg System: 10 kW

Stock Performance Summary

Metric	Value	Interpretation
Total Return (10.0Y)	134.6%	Cumulative price appreciation
Annualized Return	8.9%	Geometric mean annual return
Annualized Volatility	77.6%	Standard deviation of returns (annualized)
Sharpe Ratio	0.12	Risk-adjusted return (Rf=0)
Maximum Drawdown	-94.1%	Largest peak-to-trough decline

Data Coverage

Company: Sunrun (RUN)
Analysis Period: 2016-02-03 to 2026-01-30
Total Data Points: 9,506
Data Sources: Yahoo Finance (stock), Company filings (operational metrics)
Focus Area: Residential solar financing and customer economics

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Portfolio Sample - Synthetic operational data combined with verified market data
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