



每日晨报

2021年12月14日

国际股市走势判断

- **美股 - Omicron 疫情增温，科技龙头回调，三大指数以爆量中黑作收，多空回到对峙局面**

周一美股低开低走，平低盘开出后先回调，尔后一路盘跌，终场以中黑作收。三大指数中，道指虽有成分股可口可乐(KO)涨超 2%的支撑，但在波音(BA)跌超 3%以及陶氏化学(DOW)、家德宝(HD)等跌超 2%的拖累下，收盘下跌 0.89%，收报 35650；纳指下跌 1.39%，收报 15413；标普下跌 0.91%，收报 4668；三大指数本日成交量均较前日增加，量增价跌，多空对峙。

中国内地首次发现Omicron感染病例，英国也出现发达国家首例Omicron死亡案例，造就本日恐慌气氛，疫情重启股领跌，科技龙头股转弱，市场静待美联储进一步决议；本日反应避险需求高涨，美元强势上扬，十年期国债价格亦大涨，原油则回调，黄金盘整；本周继续关注美联储动向。

大宗资产价格方面，WTI原油下跌1%收在71美元；美国十年期公债殖利率大跌7基点收在1.42%；美元指数上涨收在96.4；比特币价格下跌收在4.9万美元；黄金小涨收在1785美元。标普500波动率指数(VIX)涨8%，市场风险偏好趋于谨慎。

本日指标纳指龙头GAMMA跌多于涨，苹果(AAPL)跌2%相对弱势。指标个股方面福特汽车(F)跌4%，电动汽车Lucid(LCID)涨3%，通用汽车(GM)跌6%，AI借贷平台Upstart(UPST)跌6%，比特币概念股Coinbase(COIN)跌1%；新能源及矿业个股普跌，特斯拉(TSLA)跌4%，替代能源商普拉格(PLUG)跌2%，锂资源商Lithium Americas(LAC)跌6%，麦克莫兰铜金(FCX)跌1%；新经济个股跌多于涨，云安全解案商Cloudflare(NET)涨3%，金融科技商银门(SI)跌9%，在线奢侈品商Farfetch(FTCH)跌6%，在线家居商Wayfair(W)涨1%；半导体股普跌，英伟达(NVDA)跌6%，台积电(TSM)跌2%；经济重启股跌多于涨，西蒙地产(SPG)跌0.8%，达美航空(DAL)跌3%；原油类股普跌，西方石油(OXY)跌5%，马拉松石油(MRO)跌5%；生技股方面普涨，辉瑞(PFE)涨5%，BioNTech(BNTX)涨7%，Moderna(MRNA)涨5%；中概股方面普跌，富途(FUTU)跌5%，拼多多(PDD)跌3%，阿里巴巴(BABA)跌2%，哔哩哔哩(BILI)跌6%。

整体而言，本日三大指数量增价跌，多空回到对峙局面。关注Omicron发展及宏观经济数字公布等议题。道指的33300点、纳指的14800点与标普的4450点为三大指数之重要支撑位。

- **港股 - 恒指高开低走，基建板块强势领涨**

周一恒指高开低走，上半场曾一度涨1.6%，午后回落，终场收跌0.17%，收报23954；国企指数下跌0.32%，收报8551；恒生科技指数下跌0.22%，收报6022。盘面上，基建板块强势领涨，电力、光伏、钢铁、煤炭、石油等板块普遍上涨，中资券商板块持续活跃，而内房、物管板块下跌，烟草概念跌幅居前。

大型科网股涨跌互见，其中互联网医疗板块涨幅居前，平安好医生涨7.4%，公司建议在市场上进行股份回购计划，最多可购回5600万股，阿里健康涨超4%，京东健康涨超2%；美团涨超2%，腾讯、小米收小红，涨幅均在1%内，阿里巴巴、百度、京东集团均高开低走，终场收小黑，跌幅在1%内。中央经济工作会议指出要全面实行股票发行注册制，中资券商板块表现活跃，光大证券、中信证券均涨超1%，中信建投证券、中金公司均收小红，涨幅在1%内。

中央强调适度开启基础设施投资，基建类股全天强势领涨，重型机械方面，中国重汽爆量涨17.88%领涨，中联重科涨超5%；建材水泥方面，中国建材涨超5%，海螺水泥、华润水泥控股均涨超3%。光伏板块涨幅居前，信义光能涨超5%，福莱特玻璃涨近5%，新特能源涨超4%；分析人士表示，“新增

国内外主要市场指数

	收盘	涨跌幅%
道琼斯指数	35,650.95	-0.89%
纳斯达克综合指数	15,413.28	-1.39%
标普500指数	4,668.97	-0.91%
恒生指数	23,954.58	-0.17%
上证指数	3,681.08	0.40%
WTI原油主链	71.13	-0.75%
COMEX黄金	1,787.40	0.15%
USDIndex	96.05	0.00%
美国十年期公债利率	1.42	-0.11%



可再生能源和原料用能不纳入能源消费总量控制”，意味着新增硅料产能将不再受能耗指标的限制，有利于 2022 年的硅料产能释放，也有利于平抑硅料价格，将带动新能源尤其是光伏和锂电产业链的发展。

南下资金录净买入 33.28 亿港元，为连续 14 日净买入，其中腾讯控股、美团-W、龙源电力、华润啤酒分别获净买入 12.08 亿港元、6.68 亿港元、2.5 亿港元、1.84 亿港元；净卖出方面，比亚迪股份、融创中国、华宝国际分别遭净卖出 2.92 亿港元、2.69 亿港元、1 亿港元。

● A 股 - 沪指突破 3700 点，元宇宙概念掀涨停潮

周一 A 股三大指数集体高开，早盘市场放量冲高后震荡整理，沪指涨 1%再度站上 3700 点，创业板指收复 3500 点，午后沪指、深成指逐步回落，创业板指高位横盘。截至收盘，沪指涨 0.4%，报 3681 点，深成指涨 0.67%，报 15212 点，创业板指涨 0.87%，报 3496 点。沪深两市合计成交额 12707 亿元，北向资金实际净流入 53.65 亿元。

重要指标股方面，招商银行跌 2%，歌尔股份涨 5.71%，宁德时代涨 2.88%，国电南瑞涨 7.89%，天赐材料跌近 4%，万华化学涨超 4%，荣盛石化涨超 7%，中远海控跌 1.5%，启明信息涨停，潍柴动力涨 2.11%，小康股份涨停，海天味业跌 2%，贵州茅台涨 1.35%，天齐锂业、北方稀土涨超 2%，保利发展跌超 3%，海螺水泥涨超 3%，东方雨虹涨 4.59%，美的集团涨 1.46%，中国电建涨 4.17%，长江电力涨 6.8%，华能国际涨 7.63%，三一重工涨 4.1%，东方财富涨 3.3%，药明康德跌 3.3%，凯莱英跌 4.25%。

行业板块方面，游戏、文化传媒、通信服务、风电设备、化纤行业等涨幅靠前，医疗服务、珠宝首饰、电池、旅游酒店、航天航空等跌幅居前；题材方面，元宇宙概念、云游戏、NFT 概念、远程办公、增强现实、绿色电力等概念表现抢眼。

元宇宙概念再度爆发，天下秀、罗曼股份、奥雅设计、共达电声、湖北广电等集体涨停；元宇宙分支 NFT 概念走强，视觉中国涨停，中文在线涨超 10%；文化传媒板块延续热度，欢瑞世界、浙文互联、引力传媒、掌阅科技涨停；游戏板块升温，姚记科技、富春股份、天神娱乐涨停；氢能源及燃料电池概念大涨，纽威股份、蓝科高新、宝丰能源等涨停；绿色电力概念再度活跃，上海电力、江苏新能、华能国际、金山股份涨停；储能概念午前崛起，四方股份、禾望电气涨停，国电南瑞、文山电力等跟涨；装修建材、水泥建材板块异动，兔宝宝涨停，北新建材触及涨停。

北上资金今日再度净买入 53.65 亿元，连续第 9 日净买入，东方财富、中国平安、三一重工分别获净买入 17.65 亿元、7.03 亿元、5.44 亿元；贵州茅台净卖出额居首，金额为 4.64 亿元。

投资策略

主动选股策略	
策略方向	关注标的股票
1. 针对最新财报公布，寻求短期交易机会	TCOM.US/ACN.US ADBE.US/RIVN.US/FDX.US
2. 针对全球最具竞争力的企业，寻求逢低买进之切入点	NVDA.US/CDNS.US/PYPL.US SNPS.US/TWLO.US/ADSK.US MELI.US/SPLK.US/DOCU.US ADBE.US/DDOG.US/TSM.US
3. 针对全球升息趋势，寻求逢低买进的切入点	GS.US/JP.M.US/DIS.US SPG.US/M.US/CCL.US/EVRG.US

全球ETF/美股-AI量化策略			
Long-only		美股个股	
HYG	↑	NVDA	↑
DBC	↑	ZM	↑
IYR	↑	TEAM	↑

推荐列表



股票	股价	涨跌幅%	投资建议
美团 3690.HK	248.00	2.06%	反垄断处罚落地，罚款力度略好于预期，美团在外卖行业领先地位稳固，中长期看好。
百度 9888.HK	145.20	-0.48%	百度Apollo作为AI改变传统交通行业代表亮相第二届联合国全球可持续交通大会；百度Apollo联合威马正式发布两款新车，新车型均基于威马W6打造。中长期看好。

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