



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，三大指数续以爆量中黑作收，空方略占上风**

周二美股续弱，低位回弹，平低盘开后先回调，午后上拉，终场以小黑作收。三大指数中，道指虽有成分股 TRV (TRV) 涨超 2% 的支撑，但在赛富时 (CRM)、微软 (MSFT) 跌超 3% 以及思科 (CSCO)、霍尼维尔 (HON) 等跌超 1% 的拖累下，收盘下跌 0.30%，收报 35544；纳指下跌 1.14%，收报 15237；标普下跌 0.75%，收报 4634；三大指数本日成交量均较前日略增，量增价跌，多空对峙下，空方略胜出。

各国 Omicron 感染病例冲高，造成本日延续昨日的回调；12 月 16 日凌晨 3 点，美联储将公布最新利率决议，同时美联储主席鲍威尔将出席新闻发布会，由于景气与就业持续增长，但物价通胀率居高不下，市场普遍预期美联储会宣布将加快缩减量化宽松计划，2015 及 2018 年第四季如果历史重演，回调基调就不易改变；本日反应避险需求仍然高涨，美元续强，原油回调，十年期国债价格与黄金略跌；继续关注美联储及 Omicron 动向。

大宗资产价格方面，WTI 原油下跌 1% 收在 70 美元；美国十年期公债殖利率反弹 2 基点收在 1.44%；美元指数上涨收在 96.5；比特币价格下跌收在 4.8 万美元；黄金跌 1% 收在 1772 美元。标普 500 波动率指数 (VIX) 涨 7%，市场风险偏好趋于谨慎。

本日指标纳指龙头 GAMMA 普跌，Meta (FB) 跌 0.2% 相对强势。指标个股方面美国铝业 (AA) 涨 5%，电动汽车 Lucid (LCID) 涨 4%，生技食品商阿米瑞斯 (AMRS) 跌 6%，MSCI 公司 (MSCI) 跌 5%，比特币概念股 Coinbase (COIN) 涨 1%；新能源及矿业个股跌多于涨，特斯拉 (TSLA) 跌 0.8%，替代能源商普拉格 (PLUG) 跌 5%，锂资源商 Lithium Americas (LAC) 跌 3%，麦克莫兰铜金 (FCX) 涨 0.8%；新经济个股跌多于涨，云安全解案商 Cloudflare (NET) 跌 9%，在线二手车商 Carvana (CVNA) 跌 8%，在线奢侈品商 Farfetch (FTCH) 跌 5%，云安全商 Zscaler (ZS) 跌 7%；半导体股涨跌互见，英伟达 (NVDA) 涨 0.6%，台积电 (TSM) 跌 0.1%；经济重启股跌多于涨，西蒙地产 (SPG) 跌 0.1%，达美航空 (DAL) 跌 0.9%；原油类股普跌，西方石油 (OXY) 跌 1%，马拉松石油 (MRO) 跌 1%；生技股方面涨跌互见，辉瑞 (PFE) 涨 0.6%，BioNTech (BNTX) 跌 0.5%，Moderna (MRNA) 涨 1%；中概股方面涨跌互见，富途 (FUTU) 跌 0.3%，拼多多 (PDD) 涨 0.02%，阿里巴巴 (BABA) 涨 3%，哔哩哔哩 (BILI) 跌 4%。

整体而言，本日三大指数量增价跌，空方略占高一线。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 - 三大指数全天呈单边下跌行情，区块链概念汽车经销商股逆市走强**

周二港股三大指数全天呈单边下跌行情，恒指跳空低开，震荡走弱，终场下跌 1.33%，收报 23635；国企指数下跌 1.55%，收报 8418；恒生科技指数下跌 2.28%，收报 5884。盘面上，内房、物管板块持续走弱，受疫情影响的濠赌股、航空股、影视娱乐股、餐饮股等集体走低，汽车股、教育股、航运股、光伏股、半导体股、煤炭股、手游等热门板块全挫，区块链概念大涨，汽车经销商股逆势走强，啤酒股、体育用品板块、燃气股小幅上涨。

大型科网股普跌，哔哩哔哩跳空跌开，盘中一度跌超 7%，尾盘跌幅收窄，终场收跌 5.73%，快手、小米集团均跌超 4%，百度跌超 3%，阿里巴巴、京东均跌约 2%，腾讯跌超 1%，美团获北水连续加仓，表现相对较稳，终场收跌 0.73%。地产、物业股持续走低，融创中国跌近 13%，雅居乐集团跌超 11%，世茂服务跌超 32%，融创服务跌超 17%。波罗的海干散货指数回落，海运股全线下跌，连续两个交易日回调，中远海控跌超 5%，中远海发跌超 3%，东方海国际跌 1.75%。

汽车经销商股逆势走强，美东汽车涨 14.53%，公司有条件同意以 37 亿元人民币收购追星汽车销售

国内外主要市场指数

	收盘	涨跌幅%
道琼斯指数	35,544.18	-0.30%
纳斯达克综合指数	15,237.64	-1.14%
标普500指数	4,634.09	-0.75%
恒生指数	23,635.95	-1.33%
上证指数	3,661.53	-0.53%
WTI原油主链	70.29	-1.40%
COMEX黄金	1,771.40	-0.95%
USDIndex	96.35	0.00%
美国十年期公债利率	1.44	0.15%



集团所有已发行股份，中升控股涨 3.8%。体育用品板块方面，特步国际获多家大行唱好，股价带量涨近 13%，创下近两个半月以来新高，李宁震荡涨超 1%，安踏体育小涨 0.16%。啤酒板块获北水加持，小幅上涨，青岛啤酒股份涨 2.68%，华润啤酒涨 1.5%，百威亚太涨 0.74%。区块链概念大涨，火币科技大涨近 55%，央行会议提出明年稳妥有序推进数字人民币研发。

南下资金录净买入 16.99 亿港元，为连续 15 日净买入，其中青岛啤酒股份、华宝国际、腾讯控股分别获净买入 4.85 亿港元、3.5 亿港元、2.49 亿港元；小米集团-W 净卖出额居首，金额为 1.85 亿港元。

● A 股 - 三大指数震荡收跌，汽车零部件板块回暖

周二 A 股三大指数集体低开，市场全天呈现弱势震荡态势，创业板盘中数度翻红依旧收跌，小盘股、题材股相对活跃，资金重点围绕元宇宙主题展开炒作，两市超百股涨停。截至收盘，沪指跌 0.53%，报 3661 点，深成指跌 0.5%，报 15136 点，创业板指跌 0.05%，报 3495 点。沪深两市合计成交额 11411 亿元，北向资金实际净流入 60.26 亿元。

重要指标股方面，平安银行跌 3.78%，招商银行跌 2.42%，蓝思科技涨 5.83%，大华股份涨 4.06%，宁德时代跌 1.12%，亿纬锂能跌 2.57%，盐湖股份涨 3.23%，天赐材料跌近 4%，恒力石化跌超 4%，中国神华跌 2.57%，中远海控跌超 5%，顺丰控股跌 3.11%，长城汽车跌 3.68%，广汽集团跌超 4%，贵州茅台涨 1.5%，北方稀土跌 4.79%，赣锋锂业跌 2.54%，中国铝业跌 4.85%，万科 A 跌超 2%，海螺水泥跌 2.81%，美的集团跌 2.6%，东方雨虹跌近 5%，航发动力涨 3.81%，中国交建跌近 3%，长江电力涨近 4%，东方证券涨超 3%，药明康德涨 1.86%，片仔癀涨近 2%，智飞生物涨 2.3%。

行业板块方面，文化传媒、包装材料、软件开发、互联网服务、电子化学品等涨幅靠前，能源金属、汽车整车、煤炭行业、钢铁行业、有色金属等跌幅居前；题材方面，元宇宙、NFT、虚拟现实、数字货币、冷链物流等概念表现抢眼。

元宇宙概念依旧活跃，美盛文化五连板，风语筑、湖北广电、罗曼股份等涨停；NFT 概念受关注，安妮股份涨停，博瑞传播、天下秀、天舟文化一度涨超 5%；元宇宙相关的文化传媒、游戏板块再度走高，天神娱乐、欢瑞世纪、浙文互联、中文传媒等涨停；汽车零部件板块回暖，湖南天雁、富奥股份、迪生力、万安科技等涨停；电子烟概念反弹，陕西金叶、劲嘉股份、爱普股份涨停；新冠检测概念异动，九安医疗、天瑞仪器、济民医疗涨停。

北上资金今日净买入 60.26 亿，东方财富获净买入 8.42 亿，五粮液获净买入 5.18 亿，招商银行获净买入 4.55 亿；平安银行遭净卖出 8.52 亿元。

投资策略

主动选股策略		全球ETF/美股-AI量化策略			
策略方向	关注标的股票	Long-only		美股个股	
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	IEF	↑	NVDA	↑
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		↑	ZM	↑
3.针对全球升息趋势，寻求逢低买进的切入点	GS.US/JPM.US/DIS.US SPG.US/M.US/CCI.US/EVRG.US		↑	TEAM	↑



推荐列表

股票	股价	涨跌幅%	投资建议
美团 3690.HK	246.20	-0.73%	反垄断处罚落地，罚款力度略好于预期，美团在行业领先地位稳固，中长期看好。
百度 9888.HK	140.30	-3.37%	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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