



每日晨报

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国际股市走势判断

- **美股 - 美联储加快 Taper，并提供加息进程，三大指数戏剧性拉尾盘以中红作收，多空对峙**

周三美股低开高走，开盘低位回荡，午后因鲍威尔谈话戏剧性上拉，终场以中红作收。三大指数中，道指虽有成分股耐克(NKE)跌近1%的拖累，但在思科(CSCO)、联合健康(UNH)涨超3%以及苹果(AAPL)、安进(AMGN)等涨超2%的支撑下，收盘上涨1.08%，收报35927；纳指上涨2.15%，收报15565；标普上涨1.63%，收报4709；三大指数本日成交量除纳指外均较前日略增，量价齐扬，多空对峙下，多方站上一线。

美国11月零售销售环比增幅0.3%低于市场预期，凸显通胀爆表已打压消费者购物积极性；美联储会议决议不但如市场预期官宣加快Taper，还提供了未来两三年如何加息的时间表，从明年1月起每月减少购债300亿美元，较今年11月和12月少购债水平提高一倍，称可能根据经济前景继续调整速度。另从位图显示，多数官员预计明年和后天各加息三次，2024年加息两次，美股盘中上演大逆转；本日美元回调，原油上涨，十年期国债价格与黄金盘整；继续关注Omicron动向。

大宗资产价格方面，WTI原油涨超1%收在71.5美元；美国十年期公债殖利率反弹1基点收在1.45%；美元指数小跌收在96.3；比特币价格盘整收在4.8万美元；黄金盘整收在1779美元。标普500波动率指数(VIX)跌11%，市场风险偏好趋于乐观。

本日指标纳指龙头GAMMA普涨，Meta(FB)涨2%相对强势。指标个股方面银杏生技(DNA)涨14%，AI借贷平台Upstart(UPST)涨6%，特朗普概念DWAC(DWAC)涨7%，元宇宙第一股Roblox(RBLX)跌9%，比特币概念股Coinbase(COIN)涨近1%；新能源及矿业个股涨多于跌，特斯拉(TSLA)涨1%，替代能源商普拉格(PLUG)涨2%，锂资源商Lithium Americas(LAC)涨0.6%，麦克莫兰铜金(FCX)跌1%；新经济个股涨多于跌，云安全解案商Cloudflare(NET)涨5%，数据推播商Digital Turbine(APPS)涨6%，在线奢侈品商Farfetch(FTCH)涨3%，云安全商Zscaler(ZS)涨8%；半导体股普涨，英伟达(NVDA)涨7%，台积电(TSM)涨3%；经济重启股涨多于跌，西蒙地产(SPG)涨0.7%，达美航空(DAL)涨0.2%；原油类股跌多于涨，西方石油(OXY)跌0.7%，马拉松石油(MRO)跌0.2%；生技股方面普涨，辉瑞(PFE)涨5%，BioNTech(BNTX)涨3%，Moderna(MRNA)涨2%；中概股方面跌多于涨，富途(FUTU)跌1%，拼多多(PDD)跌4%，阿里巴巴(BABA)跌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 - 港股持续走弱，生物医药类股午后大跌**

周三港股表现疲软，主要指数午后跌幅扩大，恒指开在平盘附近，上半场做窄幅震荡，午后跌幅扩大，终场下跌0.91%，收报23420；国企指数下跌0.9%，收报8342；恒生科技指数下跌1.52%，收报5795。盘面上，生物医药类股午后大跌，半导体股、体育用品股、教育股、恒大概念、家电股、汽车股等板块普跌，而电力股全体维持强势行情，煤炭、光伏、港口航运板块小幅走高。

大型科网股普跌，小米、百度均低开低走，收盘均跌超2%，美团、京东表现弱势，均跌超1%，腾讯收小黑，跌幅在1%内，惟阿里巴巴逆市涨近2%。半导体股普跌，中芯国际跌6.4%，外媒报道美国政府正在考虑对中芯国际实施更严厉制裁；上海复旦跌超6%，华虹半导体跌超4%。生物医药类股午后大跌，药明生物爆量大跌逾19%，药明巨诺-B跌超11%；荣昌生物-B跌超17%，信达生物、腾盛博药均跌超9%。

国内外主要市场指数

	收盘	涨跌幅%
道琼斯指数	35,927.43	1.08%
纳斯达克综合指数	15,565.58	2.15%
标普500指数	4,709.85	1.63%
恒生指数	23,420.76	-0.91%
上证指数	3,647.63	-0.38%
WTI原油主链	71.45	1.02%
COMEX黄金	1,777.40	0.29%
USDIndex	96.34	-0.23%
美国十年期公债利率	1.47	0.32%



电力板块涨幅居前，华电国际涨近 9%，大唐发电涨近 7%，华能国际涨超 5%，华润电力涨近 5%；中信证券发报指出电力板块供需环境好转可期，火电有望在 2022 年重新恢复盈利能力，新能源运营商有望通过充分摄取技术红利的形式以降低成本和扩张 ROE。光伏板块集体上涨，保利协鑫能源涨超 13%，公司公告拟配售最多 20.37 亿股，净筹约 49.94 亿港元用作资本性支出及一般营运资金用途；信义玻璃涨 2.5%，信义光能涨超 1%。

南下资金录净买入 34.75 亿港元，为连续 16 日净买入；腾讯控股、华润电力、青岛啤酒、美团分别获净买入 7.5 亿港元、3.26 亿港元、1.96 亿港元、1.9 亿港元；药明生物净卖出额居首，金额为 9.74 亿港元。

● A 股 - 三大指数震荡收跌，CRO 板块尾盘跳水

周三三大指数低开，早盘市场翻红冲高后回落陷入震荡整理态势，午后指数依旧低迷，尾盘小幅下挫，创业板指领跌。截至收盘，沪指跌 0.38%，报 3647 点，深成指跌 0.73%，报 15026 点，创业板指跌 0.87%，报 3464 点。沪深两市合计成交额 11360.8 亿元，北向资金实际净流入 7.52 亿元。

重要指标股方面，海康威视跌 3.67%，立讯精密跌 2.11%，北方华创跌 2%，盐湖股份跌 3.82%，兖矿能源涨停，顺丰控股跌 2.58%，中远海控涨 1.21%，长城汽车跌 1.51%，中航高科跌 2.17%，三七互娱跌 3.68%，牧原股份跌 1.66%，五粮液跌 2.48%，海天味业跌 3.16%，中国中免跌 2.07%，中国电建涨 5.01%，美的集团跌 0.99%，包钢股份涨 3.4%，天齐锂业跌 6.32%，北方稀土跌 3.53%，华电国际涨停，华能国际涨超 7%，药明康德跌停，泰格医药跌超 8%，复星医药跌超 3%，凯莱英跌 5%，迈瑞医疗跌 3.31%。

行业板块方面，电力行业、工程建设、电网设备、公用事业、房地产开发等涨幅靠前，能源金属、医疗服务、食品饮料、酿酒行业、医疗器械等跌幅居前；题材方面，绿色电力、智能电网、次新股、等概念表现抢眼。

智能电网概念持续走高，长城电工、东方电子、海联讯等集体涨停，平高电气、国网信通、四方股份等触及涨停；电力行业受提振，晋控电力、华电国际、金山股份等涨停；基建板块强势崛起，四川成渝、中材国际、成都路桥、山西路桥、龙元建设等涨停；房地产板块发力，财信发展、三湘印象、渝开发、南国置业、京能置业等涨停；元宇宙概念冲高回落，宣亚国际、湖北广电、奥拓电子等涨停；CRO 板块尾盘跳水，药明康德跌停，皓元医药、泰格医药、九州药业、康龙化成等跌超 5%。

北上资金净买入 7.52 亿元，连续第 11 日净买入，东方财富、阳光电源、五粮液分别获净买入 7.19 亿元、4.96 亿元、4.14 亿元；药明康德净卖出额居首，金额为 6.96 亿元。北上资金已连续 8 个交易日净买入东方财富，共计 68.07 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/JPM.US/DIS.US SPG.US/M.US/CCI.US/EVRG.US

全球ETF/美股-AI量化策略			
Long-only		美股个股	
IEF	↑	NVDA	↑
QQQ	↑	ZM	↑
EWJ	↑	TEAM	↑



推荐列表

股票	股价	涨跌幅%	投资建议
美团 3690.HK	241.80	-1.79%	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	136.50	-2.71%	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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