



每日晨报

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国际股市走势判断

- **美股 - 经济数据略优预期支持 股市续弹，但节前量缩有背离现象，三大指数收小红，多空对峙**

周四美股平开高走，平高盘开出后一路震荡走高，收盘略跳水，终场以小红作收。三大指数中，道指虽有成分股默沙东(MRK)跌超0.5%的拖累，但在卡特彼勒(CAT)涨超2%以及陶氏化学(DOW)、霍尼维尔(HON)等涨超1.5%的支撑下，收盘上涨0.55%，收报35950；纳指上涨0.85%，收报15653；标普上涨0.62%，收报4725；三大指数本日成交量均较前日微减，量缩价扬，多方连三日弹升，但多空仍对峙。

本日经济数据偏多，支持节前股市上扬。美国11月耐用品订单环比增2.5%高于预期的1.8%，其中飞机订单大增，显示消费需求趋稳；上周首申失业金20.5万人平预期，就业仍朝持续复苏前进。11月核心PCE个人消费支出物价指数创39年新高，年增5.7%，高于10月的5.1%与市场预期的年增5.5%，月增率为0.6%，高于市场预估的月增0.4%，不含食品与能源的PCE年增4.7%，月增0.5%，也高于市场预估的年增4.3%、月增0.2%。美国11月新屋销售年率74万户，月增12%，但略低于市场预期。12月密歇根大学消费者信心指数70.4亦有改善；半导体股、新经济股相对强势，但整体交投量缩值得观察。美元回调，原油反弹，黄金转强，十年期国债殖利率略升；继续关注Omicron及美国景气现况发展。

大宗资产价格方面，WTI原油涨超1%收在73.7美元；美国十年期公债殖利率上涨3基点收在1.49%；美元指数下跌收在96.1；比特币价格微涨收在5.0万美元；黄金微涨收在1808美元。标普500波动率指数(VIX)跌3%，市场风险偏好趋于稳定。

本日指标纳指龙头GAMMA普涨，Meta(FB)涨1%相对强势。指标个股方面SPAC公司Bakkt(BKKT)涨7%，雾芯科技(RLX)涨7%，电动车商Lucid(LCID)跌2%，银杏生技(DNA)跌3%，比特币概念股Coinbase(COIN)涨5%；新能源及矿业个股普涨，特斯拉(TSLA)涨5%，替代能源商普拉格(PLUG)涨1%，锂资源商Lithium Americas(LAC)跌0.7%，麦克莫兰铜金(FCX)涨2%；新经济个股涨多于跌，金融科技商银门(SI)涨5%，在线宠物品商Chewy(CHWY)涨6%，在线奢侈品商Farfetch(FTCH)涨3%，非洲电商Jumia(JMIA)跌1%；半导体股普涨，英伟达(NVDA)涨0.8%，美光(MU)涨4%；经济重启股涨跌互见，西蒙地产(SPG)跌0.05%，达美航空(DAL)涨0.4%；原油类股跌多于涨，西方石油(OXY)跌0.2%，马拉松石油(MRO)跌0.2%；生技股方面跌多于涨，辉瑞(PFE)跌1%，BioNTech(BNTX)跌1%；中概股方面涨跌互见，富途(FUTU)涨2%，拼多多(PDD)跌1%，京东(GD)跌6%，哔哩哔哩(BILI)跌2%。

整体而言，本日三大指数量缩价涨，多方连三弹。关注Omicron发展及宏观经济数字公布等议题。道指的35000点、纳指的14700点与标普的4500点为三大指数之重要支撑位。

- **港股 - 恒指连续三日上涨，电力板块再度走高**

周四恒指震荡收小红，终场量增上涨0.4%，收报23193，连续三个交易日上涨；国企指数微涨0.11%，收报8204；恒生科技指数下跌0.83%，收报5638。盘面上，电力股再度领衔走高，稀土概念、手游股、光伏股、港口航运股普涨，而互联网医疗板块跌幅居前，汽车经销商、体育用品、医美板块全天表现弱势。

大型科网股跌多于涨，腾讯宣布以中期派息方式将所持有约2.6亿股京东集团股权发放给股东，本次派息后腾讯对京东持股比例将由17%降至2.3%，腾讯收涨逾4%，京东早盘下杀，一度跌超10%，终场收跌逾7%；美团、阿里巴巴均跌超1%，小米集团涨0.76%；互联网医疗板块跌幅居前，京东健康、阿里健康均跌超4%，平安好医生跌超1%。

国内外主要市场指数

	收盘	涨跌幅%
道琼斯指数	35,950.56	0.55%
纳斯达克综合指数	15,653.37	0.85%
标普500指数	4,725.79	0.62%
恒生指数	23,193.64	0.40%
上证指数	3,643.34	0.57%
WTI原油主链	73.76	1.37%
COMEX黄金	1,810.10	0.44%
USDIndex	96.46	0.00%
美国十年期公债利率	1.49	0.03%



电力股再度领衔走高，大唐新能源大涨逾 18%，联交所披露贝莱德于本月 17 日以每股均价 3.1852 港元增持好仓 5141.9 万股，增持后持好仓比例由 5.39% 上升至 7.45%；京能清洁能源涨超 15%，大唐发电涨超 11%，中国电力、华能国际均涨超 9%，华电国际涨超 8%，华润电力涨超 7%。内地国资委联同中国五矿、中铝集团、赣州市政府等筹组的中国稀土集团已在赣州挂牌，中国稀土涨超 2%，中国铝业爆量涨近 9%；有色金属板块涨多于跌，五矿资源涨近 6%，江西铜业股份涨近 2%，紫金矿业、招金矿业均涨超 3%。

南下资金录净买入 28.65 亿港元，为连续 22 日净买入，累计净买入 573.95 亿港元；其中美团-W、龙源电力、长城汽车、腾讯分别获净买入 3.23 亿港元、2.96 亿港元、2.35 亿港元、2.35 亿港元，南下资金已连续 16 个交易日净买入腾讯，累计 95.8 亿港元；快手-W 净卖出额居首，金额为 1.3 亿港元。

• A 股 - 三大指数震荡收涨，绿电、汽车零部件板块大涨

周四 A 股三大指数集体高开，早盘指数表现低迷，呈现横盘震荡态势，创业板指微跌；午后市场人气有所回升，沪指、深成指逐步上扬，创业板指翻红。截至收盘，沪指涨 0.57%，报 3643 点，深成指涨 0.49%，报 14863 点，创业板指涨 0.15%，报 3373 点。沪深两市合计成交额 10772.8 亿元，北向资金实际净流入 24.92 亿元。

重要指标股方面，立讯精密涨 2.51%，沪电股份涨 6.13%，宁德时代涨 1.94%，国电南瑞涨 5.72%，盐湖股份跌 2.57%，中国石油涨 2.86%，中国神华涨 2.53%，中远海控涨 2.23%，江淮汽车涨停，德赛西威涨 2.73%，均胜电子涨超 9%，贵州茅台涨 3.52%，五粮液涨 2.11%，泸州老窖涨 4.36%，牧原股份涨 4.31%，大金重工涨 3.59%，海螺水泥涨 1.21%，中国电建涨 3.7%，中国铝业涨停，华能水电涨 4.32%，中国核电涨 3.6%，广发证券涨 1.94%，云南白药跌 2.16%，智飞生物跌 3.34%。

行业板块方面，电力行业、风电设备、煤炭行业、汽车零部件、酿酒行业等涨幅靠前，房地产服务、房地产开发、游戏、医疗器械、教育等跌幅靠前；题材方面，绿色电力、激光雷达、猪肉概念、白酒等概念表现抢眼。

汽车零部件板块卷土重来，广东鸿图、沪光股份、常熟汽饰、文灿股份等集体涨停；绿色电力概念发力，太阳能、吉电股份、节能风电、华能国际、大唐发电、江苏新能等涨停；氢能源板块持续走强，雪人股份、韶钢松山、冰轮环境、恒久科技等涨停，致远新能、美锦能源等涨超 5%；元宇宙概念分化，三湘印象、博瑞传播、罗曼股份等封板，美盛文化、宝鹰股份跌停；稀土永磁板块走高，焦作万方、中国铝业涨停，中色股份、中钢天源、包钢股份不同程度上涨；房地产板块持续走低，渝开发、大龙地产、蓝光发展等跌停。

北上资金今日净买入 24.92 亿元，宁德时代、东方财富、三峡能源分别获净买入 4.74 亿元、2.82 亿元、1.75 亿元；五粮液净卖出额居首，金额为 9.93 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	BB.US/KMX.US	TLT	↑	PANW	↑
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	HYG	↑	INTU	↑
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	DBC	↑	TXN	↑



推荐列表

股票	股价	涨跌幅%	投资建议
美团 3690.HK	226.60	-1.65%	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	138.60	-0.29%	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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