



## 每日晨报

2021年12月22日

### 国际股市走势判断

#### ● 美股 - 耐克美光财报优预期，拜登喊话助攻，三大指数反弹收中红，多空回到对峙局面

周二美股高开高走，平高盘开后先行回调，尔后一路走高直至收盘，终场以中红作收。三大指数中，道指虽有成分股默沙东(MRK)跌超1%的拖累，但在耐克(NKE)涨超6%以及波音(BA)、美国运通(AXP)等涨超3%的支撑下，收盘上涨1.60%，收报35492；纳指上涨2.40%，收报15341；标普上涨1.78%，收报4649；三大指数本日成交量均较前日微减，量缩价扬，多空回到对峙局面。

虽然奥密克戎冲击令荷兰、德国、奥地利采取封禁行动，英国也将在48小时内决定是否收紧防疫措施，并迅速席卷美国，新增确诊中的比例暴增，美国总统拜登表示仍可能与参议员曼钦达成协议，使大约2万亿美元的「重建更美好未来」(Build Back Better)计划获得国会通过，本日股势强劲反弹；耐克北美需求强劲，季报业绩超预期，股价涨超6%；另外美国最大存储芯片制造商美光由于芯片需求强劲，财报及下季度指引均优于预期，带动道指冲高；中概股、新经济股大幅反弹，能源股亦随原油上扬，引领指数反攻。本日美元回调，原油反弹，黄金盘整，十年期国债殖利率略跌；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3%收在71.2美元；美国十年期公债殖利率下跌3基点收在1.45%；美元指数微跌收在96.4；比特币价格微涨收在4.9万美元；黄金盘整收在1790美元。标普500波动率指数(VIX)跌8%，市场风险偏好趋于稳定。

本日指标纳指龙头GAMMA普涨，谷歌A(GOOG)涨1%相对弱势。指标个股方面AI借贷平台Upstart(UPST)涨13%，凯萨娱乐(CZR)涨8%，元宇宙第一股Roblox(RBLX)涨3%，通用磨坊(GIS)跌4%，比特币概念股Coinbase(COIN)涨4%；新能源及矿业个股普涨，特斯拉(TSLA)涨4%，替代能源商普拉格(PLUG)涨5%，锂资源商Lithium Americas(LAC)涨6%，麦克莫兰铜金(FCX)涨4%；新经济个股普涨，通讯数据软件商Digital Turbine(APPS)涨6%，在线二手车商Carvana(CVNA)涨10%，在线家居品商Wayfair(W)涨4%，非洲电商Jumia(JMIA)涨10%；半导体股普涨，英伟达(NVDA)涨4%，美光(MU)涨10%；经济重启股亦普涨，西蒙地产(SPG)涨5%，达美航空(DAL)涨5%；原油类股涨多于跌，西方石油(OXY)涨6%，马拉松石油(MRO)涨6%；生技股方面跌多于涨，辉瑞(PFE)跌3%，BioNTech(BNTX)跌1%，Moderna(MRNA)跌2%；中概股方面普涨，富途(FUTU)涨9%，拼多多(PDD)涨8%，阿里巴巴(BABA)涨6%，哔哩哔哩(BILI)涨11%。

整体而言，本日三大指数量缩价涨，多方扳回一城。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 - 港股反弹，内房物管携手反弹，绿电概念再度活跃

周二恒指早盘小幅高开，盘中做窄幅震荡，尾盘拉升，终场上涨1%，收报22971；国企指数上涨1.23%，收报8141；恒生科技指数上涨2.08%，收报5612。盘面上，大型科网股反弹，内房、物业板块携手拉升，电力股再度活跃，而石油、香港银行股少数走低。

连续下跌的权重科技股反弹，美团、小米均涨超4%，腾讯涨超2%，百度、快手微涨，涨幅均在1%内，阿里巴巴则跌0.52%，哔哩哔哩持续探底，再跌4.17%。SaaS板块表现亮眼，金蝶国际涨7.88%，金蝶国际早前公布金蝶业务系统成功完成首单使用数字人民币进行公转私支付业务；阜博集团涨超7%，微盟集团、中国有赞均涨超3%，金山软件涨超2%。半导体板块止跌反弹，上海复旦涨超4%，华虹半导体涨超3%，中芯国际涨超1%。

电力板块再度活跃，华能国际、中广核电力均涨超5%，中国电力涨超4%，大唐发电涨超3%，华润

国内外主要市场指数		
	收盘	涨跌幅%
道琼斯指数	35,492.70	1.60%
纳斯达克综合指数	15,341.09	2.40%
标普500指数	4,649.23	1.78%
恒生指数	22,971.33	1.00%
上证指数	3,625.13	0.88%
WTI原油主链	71.27	3.88%
COMEX黄金	1,789.60	-0.28%
USDIndex	96.52	0.00%
美国十年期公债利率	1.46	-1.70%



电力涨近 2%。5G 规范标准将继续推进，叠加中国移动即将在 A 股进行 IPO，预计接下来会加大对 5G 的资本投入，长飞光纤电缆涨超 4%，中兴通讯涨超 1%，中国移动微跌。

南下资金录净买入 32.75 亿港元，为连续 20 日净买入，累计净买入 514.83 亿港元；其中腾讯控股、小米集团-W、美团-W 分别获净买入 11.68 亿港元、3.73 亿港元、3.32 亿港元，南下资金已连续 14 个交易日净买入腾讯，累计 88.62623 亿港元；药明生物净卖出额居首，金额为 1.74 亿港元。

### ● A 股 - 三大指数震荡上扬，房地产板块逾 30 股涨停

周二 A 股三大指数集体低开，早盘市场表现分化，沪指震荡上扬收复 3600 点，深成指、创业板指冲高回落，午后各大指数集体回暖走强，沪指涨近 1%，创业板指翻红收涨。截至收盘，沪指涨 0.88%，报 3625 点，深成指涨 0.82%，报 14688 点，创业板指涨 0.53%，报 3350 点。沪深两市合计成交额 10003 亿元，北向资金实际净流出 9.97 亿元。

重要指标股方面，立讯精密涨 2.57%，联创电子涨 9.13%，国电南瑞涨 2.48%，汇川技术涨 2.79%，盐湖股份跌 5.12%，恩捷股份跌 2.97%，德赛西威涨停，中国神华涨 2.02%，顺丰速递涨 1.9%，上港集团涨 2.9%，均胜电子涨 3.01%，比亚迪涨 2.11%，海天味业跌 2.01%，贵州茅台跌 1.01%，五粮液跌 1.84%，三七互娱涨近 3%，万科 A 涨 3.83%，保利发展、新城控股涨超 5%，海螺水泥涨 2.28%，美的集团涨 2.92%，北新建材涨 4.23%，横店东磁跌 5.94%，北方稀土跌 2.94%，中国核电涨 5.59%，兴业证券涨 3.09%，迈瑞医疗涨 3.62%，药明康德涨 3.14%，通策医疗涨 3.62%，沃森生物跌 3.48%。

行业板块全线飘红，房地产服务、房地产开发、装修建材、旅游酒店、汽车服务等涨幅靠前，风电设备、生物制品、燃气、电机、电网设备等涨幅较小；题材方面，租售同权、装配建筑、在线旅游、数字货币等概念表现抢眼。

房地产板块掀涨停潮，渝开发、蓝光发展、京能置业、香江控股等涨停；装修建材、房屋租赁等板块受地产股行情提振，全筑股份、扬子新材、汇通能源等涨停；元宇宙概念局部活跃，国光电器、棕榈股份、湖北广电、川大智胜等涨停；汽车零部件板热度不减，华阳集团、天成自控、德赛西威等涨停；医美概念大涨，宜华健康、创新医疗、新华制药涨停，济民医疗、华东医药涨超 5%；午后券商板块发力，太平洋涨停，国金证券、天风证券等跟随走高。

北上资金今日净卖出 9.97 亿元。其中，五粮液、歌尔股份、宁德时代分别获净卖出 6.65 亿元、5.24 亿元、4.83 亿元。净买入中国能建 3.13 亿元，贵州茅台 2.1 亿元，中国平安 1.62 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/CCL.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	229.00	4.47%	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	136.60	0.74%	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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