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(Oxford Economics) • (Ben May) :“

2017 ”

• (Donald Trump) “ ”

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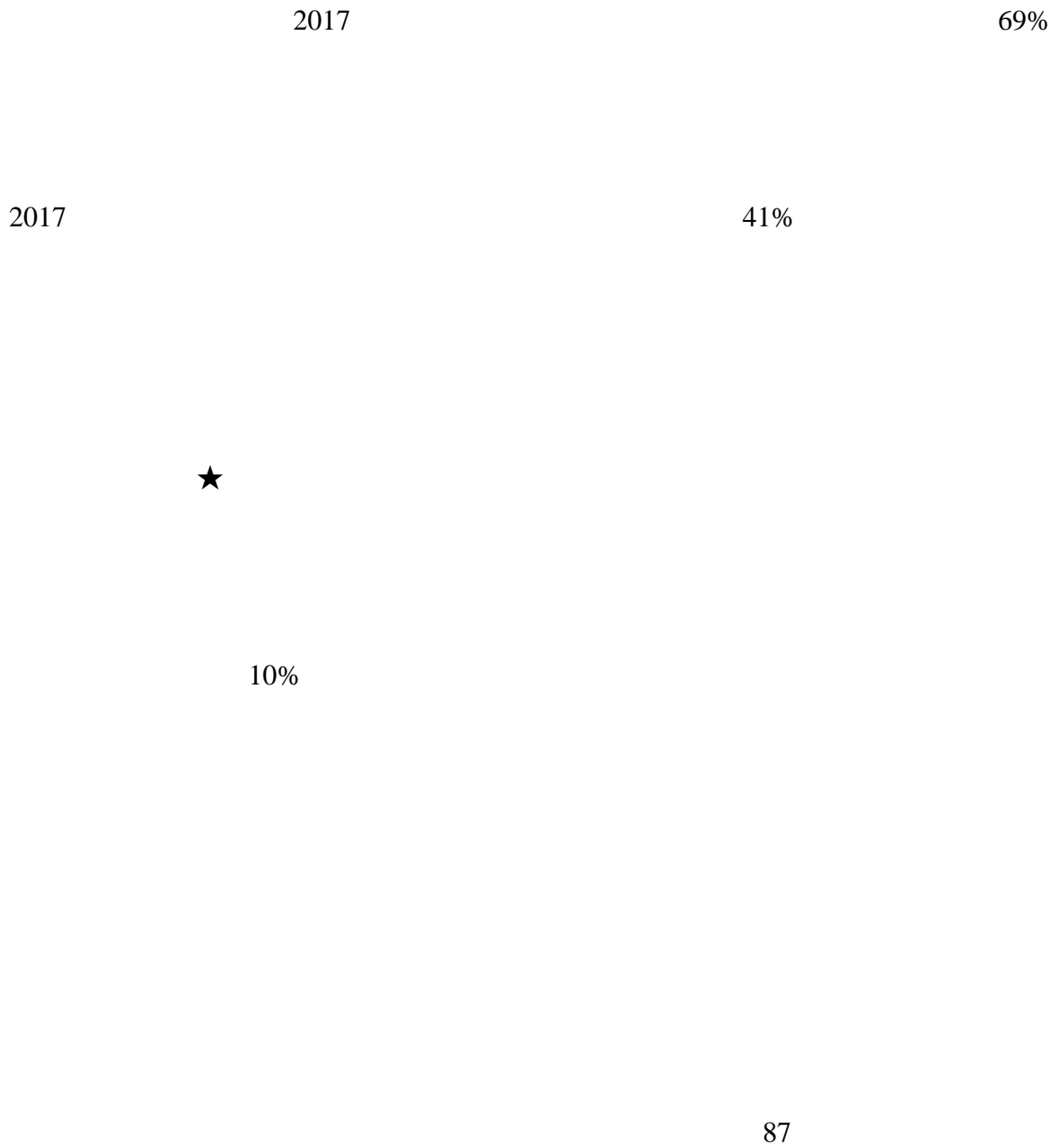
” (Capital Economics) Andrew wishard

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2017

4%

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版块	品类	2017出口总额 (亿美元)	2017对美出口额 (亿美元)	2017年对美 出口占比
大家电	冰箱	10.4	2.1	20%
	洗衣机	11.8	2.8	23%
	空调	25.8	4.3	17%
	家用洗碗机	12.2	4.9	40%
	家用烘干机	3.7	0.5	14%
商用	商用冰箱	12.2	1.8	15%
	商用冰柜	3.8	0.2	5%
小家电	电热水壶	1.5	0.1	7%
	电压力锅	1.5	0.1	7%
	电炒锅	1.5	0.1	7%
	微波炉	26.9	10.2	38%
	电烤箱	6.8	1.7	26%
	清洁电器 吸尘器	40.0	16.2	41%
	净水器	2.6	0.7	27%
	空调压缩机	15.4	0.9	6%
	制冷压缩机	11.6	0.5	4%
	微通道换热器	0.9	0.6	69%
空调电机	8.5	3.4	41%	

版块	公司	外销规模 (百万)	收入规 模(百 万)	外销占 比	出口美 国收入 占比	相关涉及产品
白电板块	格力电器	18494	150020	12%	2%	白电及厨房小家
	美的集团	103956	241919	43%	5%	电
	海尔集团	67000	150000	45%	10%	白电及厨房小家

<http://news.ehvacr.com/news/2018/0718/104763.html>

Top

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1-7 39038.1 17.1%

1-6	0.1				
1-7				11913.2	30.5%
		125.2	4.1%		27801
21.3%				9422.4	7.5%
10215.1		10.3%			
1-7				3366.7	53.4%
33084.4		14.3%			2587
	17.8%				
1-7	41		32		9
				18%	4.5
		1.4%	0.2%		36.1%
			29.2%		45.2%
	97.8%		9%		23.1%
1.6%			1%		0.9%
		19.6%			9.8%
1-7				60.5	9.9%
	51.1		9.5%		6.46%

0.3%

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3.6%

2079.8

12.1%

538.5

3.9%

2018

1-6

97.4%

0.8%

2029.3

7.1%

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97.5%

0.2%

353.5

3.9%

<http://news.ehvacr.com/news/2018/0822/104959.html>

Top

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2018 3

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<http://news.ehvacr.com/news/2018/0822/104963.html> Top

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2018-2019

2018-2019

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(VOCs)

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;"2+26" 2019 1 1 VOCs

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9 VOCs 2018 12 VOCs

VOCs

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VOCs ;

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10% 15% 20%

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<http://news.ehvacr.com/news/2018/0828/105007.html> Top

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<http://news.ehvacr.com/news/2018/0807/104869.html> Top

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<http://news.ehvacr.com/news/2018/0831/105043.html>      Top

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<http://www.chinaiol.com/cold/s/0827/15200591.html>      Top

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<http://www.compressoronline.cn/index.php?m=content&c=index&a=show&catid=106&id=8136> Top

14

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PM2.5

2015

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/PLUS50

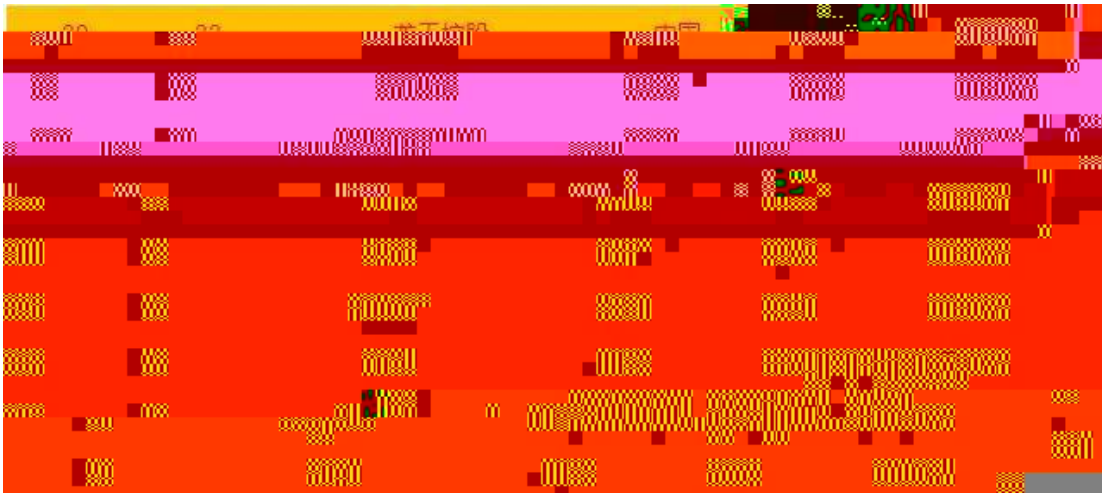
2018年营业收入



13	14	中联重科	中国	3796	2.30%
14	16	维特根集团	德国	3690	2.30%



www.ysjw.cn



Rank	Company	Country	Value	Change	Previous Rank	Next Rank
41	欧历胜	法国	577	0.40%	42	39
	爱知	日本	540	0.30%	43	49
	Bell Equipment	南非	514	0.30%	44	43
	古河	日本	487	0.30%	45	46
40	福雷斯特	中国	482	0.30%	46	40
	洋马	日本	433	0.30%	47	45
	久保田	日本	370	0.20%	48	44
	森尼伯根	德国	370	0.20%	49	46
	海德堡	土耳其	360	0.20%	50	
	酒井重工业株式会社	日本	325	0.20%		

<https://www.ysjw.cn/news/show-2807.html> Top

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2018 10 1 2019 3 31

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IHSMarkit

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EnergyTrend

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6 IHSMarkit

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MIP

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<https://solar.ofweek.com/2018-09/ART-260008-8420-30264805.html>

Top

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<https://solar.ofweek.com/2018-09/ART-260009-8420-30268229.html>

Top

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2	77000MW			2022	38 5	
	77 000			2022	10	
		2018 7		23 120		
3 7		14 24		64 95		
7		320 19		12 23	1720 31	
	9 08		9 29		31 53	296 66
	10 04		14 24		64 95	
7			2116		3	

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1311 22	15 77		
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95 92			
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2794MW 2018

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<https://solar.ofweek.com/2018-08/ART-260006-8440-30258405.html>

Top

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2020

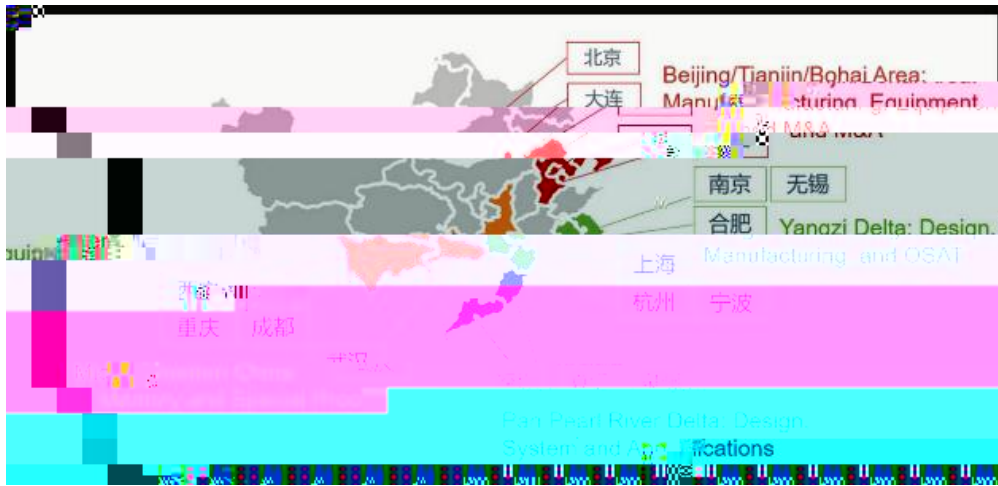
20

2018 9 4 SEMI

IC

The China IC Ecosystem

Report	IC				
	16	2020		20	
		2020		200	
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	IC			2017	319
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			1,400	215	2014
1500-2000	230	300			
IC					
	IC		25		
	17	300mm		DRAM	3D NAND
	IC				
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IC

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<http://www.semi.org/en/china-ic-ecosystem-report>

[http://www.semi.org.cn/news/news\\_show.aspx?ID=53889&classid=117](http://www.semi.org.cn/news/news_show.aspx?ID=53889&classid=117) Top

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[http://www.semi.org.cn/news/news\\_show.aspx?ID=53929&classid=117](http://www.semi.org.cn/news/news_show.aspx?ID=53929&classid=117) Top

26

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[http://www.semi.org.cn/news/news\\_show.aspx?ID=53991&classid=117](http://www.semi.org.cn/news/news_show.aspx?ID=53991&classid=117)

[Top](#)

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270

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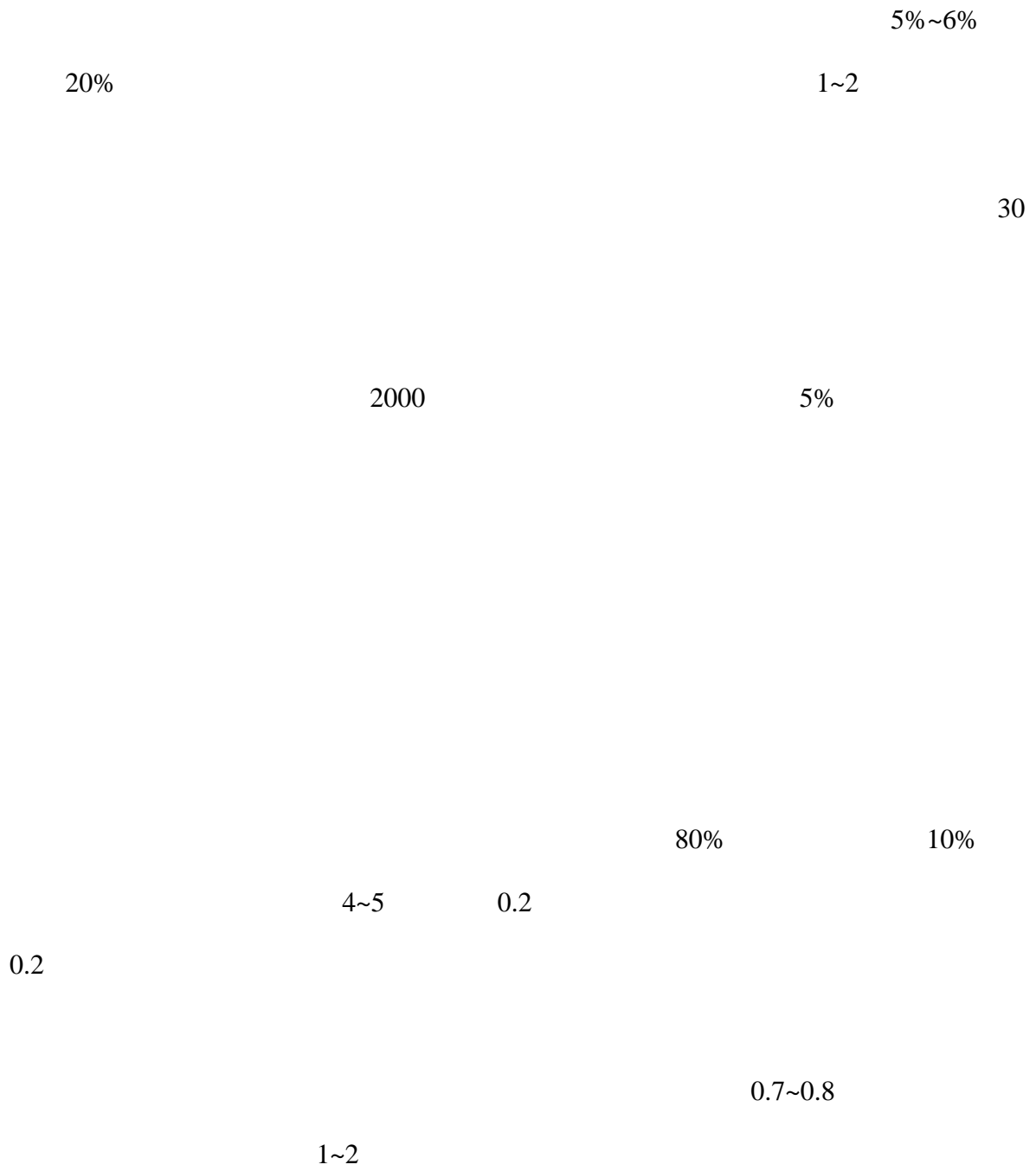
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Mirai “ ”  
Mirai Yoshikazu Tanaka  
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<http://www.compressoronline.cn/index.php?m=content&c=index&a=show&catid=108&id=8123> Top





<http://www.compressoronline.cn/index.php?m=content&c=index&a=show&catid=106&id=8138> Top

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<http://www.compressor.cn/News/hyqx/2018/0628/105391.html>

49%

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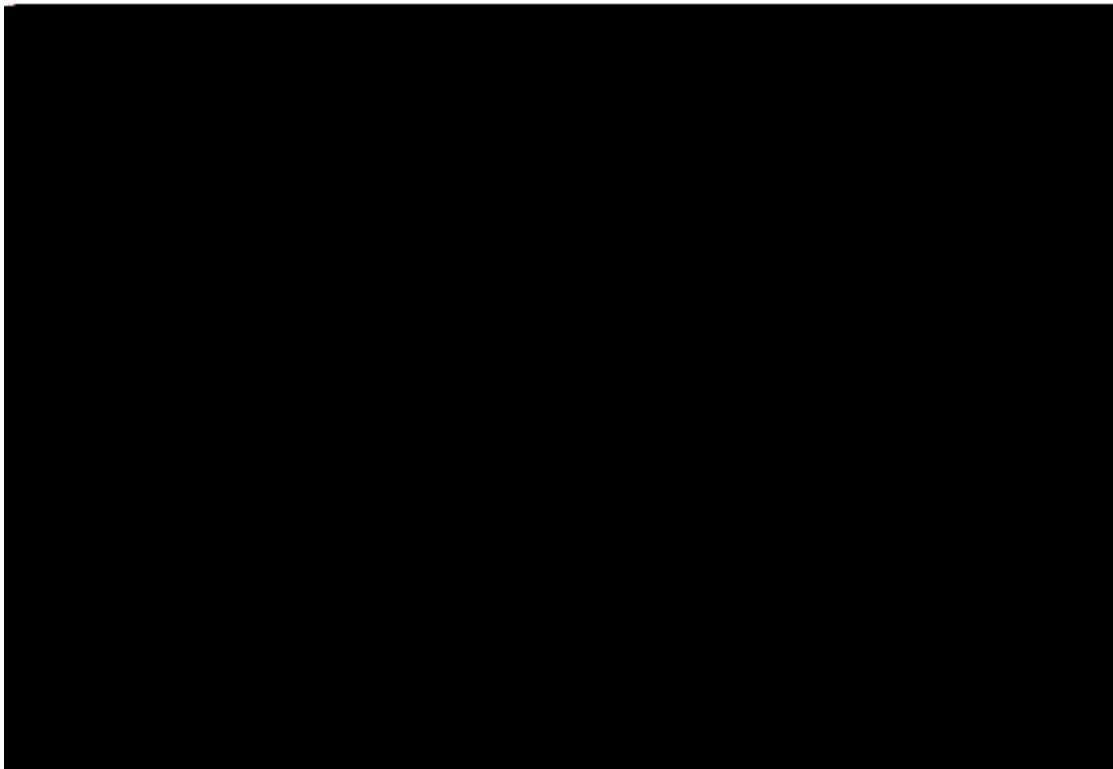
1200

<http://www.chinaiol.com/cold/s/0905/11201057.html> Top

产品	价格	8月1日	8月8日	8月15日
多晶硅料	一级料 (USD)	96	96	96
多晶硅料	二级料	11.2	11.5	11.5
多晶硅料	三级料	10.4	10.4	9.6
多晶硅料	四级料	10.5	10.5	10.2

产品	价格	8月1日	8月8日	8月15日
多晶硅料	一级料 (USD)	96,000	96,000	96,000
多晶硅料	二级料	11,200	11,500	11,500
多晶硅料	三级料	10,400	10,400	9,600
多晶硅料	四级料	10,500	10,500	10,200

产品	价格	8月1日	8月8日	8月15日
多晶硅片 (RMB)	高	2.550	2.550	2.520
	低	2.400	2.420	2.400
	均	2.500	2.500	2.500
多晶硅片 (USD)	高	0.330	0.330	0.330
	低	0.320	0.322	0.320
	均	0.325	0.325	0.322
单晶硅片 (RMB)	高	3.400	3.280	3.280
	低	3.120	3.120	3.120
	均	3.150	3.150	3.150
单晶硅片 (USD)	高	0.450	0.420	0.420
	低	0.390	0.395	0.395
	均	0.405	0.405	0.405



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95 kg

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单晶PERC电池片 (RMB)	高	1.150	1.150	1.120
	低	1.120	1.120	1.100
1.150				均

产品	价格	日期	日期	日期
单晶电池 (RMB)	高	0.360	0.350	0.360
	低	0.360	0.350	0.360
	均	0.360	0.350	0.360

单晶高效电池片 (RMB)	高	1.180	1.180	1.180
	低	1.150	1.150	1.150
	均	1.180	1.180	1.180
0.170	单晶高效电池片 (USD)	高	0.180	0.180
0.170		低	0.170	0.170
0.168		均	0.176	0.172

PERC

2017

PERC

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270 275W 285 290W

PERC

8 2 1 W

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2018 2020

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2020

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2020

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570MW









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[http://www.semi.org.cn/news/news\\_show.aspx?ID=54005&classid=117](http://www.semi.org.cn/news/news_show.aspx?ID=54005&classid=117) Top

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2018 5 31

2018-2022

<http://news.ehvacr.com/news/2018/0808/104878.html> Top

8

	(2017-2018)	2017	
40			
	2020		72
2017		40	32
10			3
	2017	2018	
	9120	52	6

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		2020	5000	/kW	2030		
600	/kW						
						2020	
1000	/kW	2030	150	/kW			
2020			3000	/kg	2030	1800	/kg
1kg			1800				
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				40	/kg		2020
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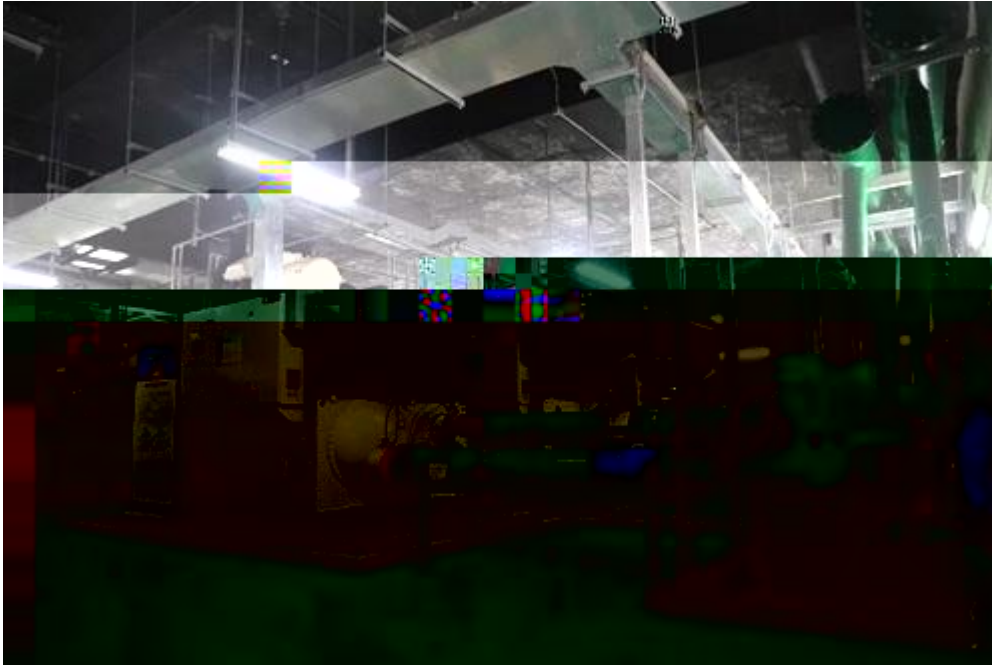
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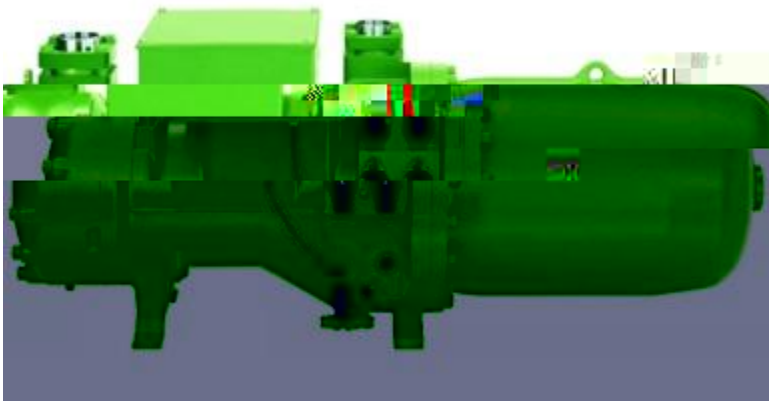
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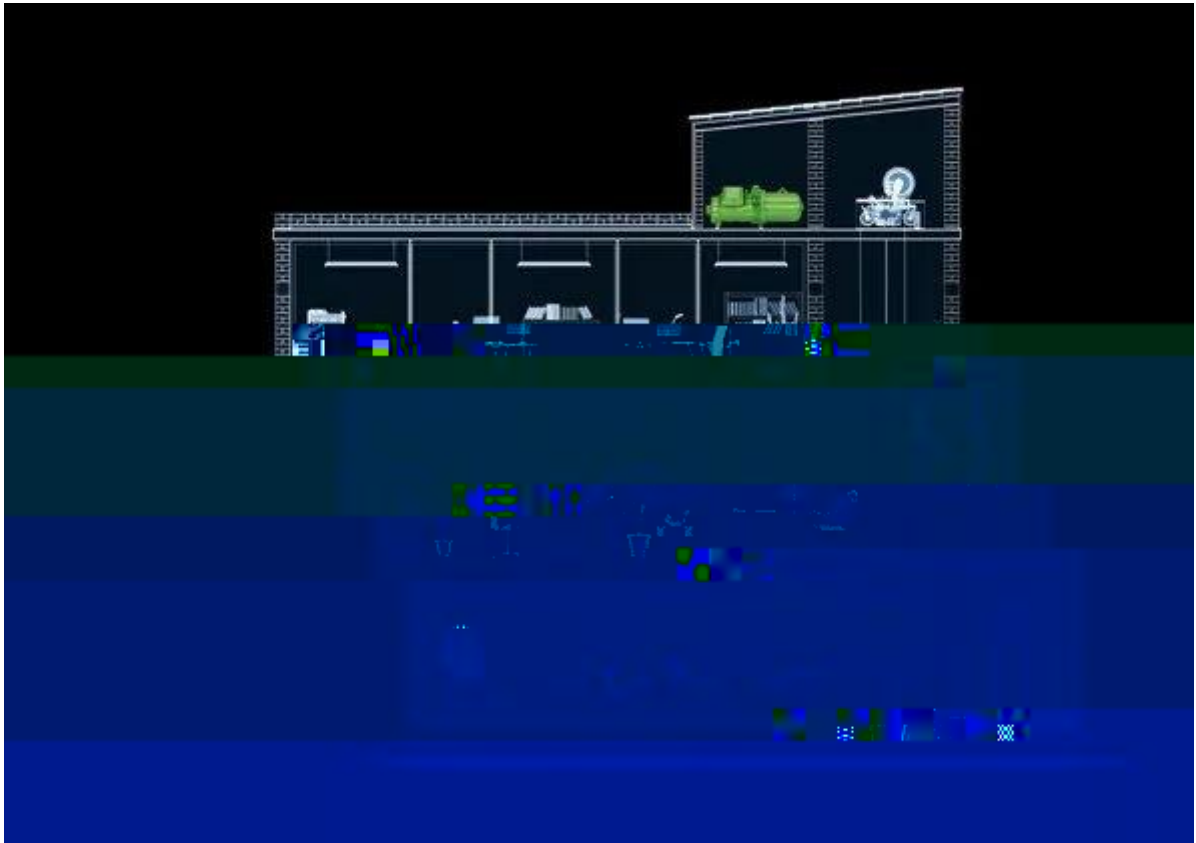


CSW



R134a

20°C



<http://www.chinaiol.com/cold/s/0810/53199900.html> Top

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<http://www.chinaiol.com/cold/s/0810/07199902.html> Top

8 23 2018

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-60°C



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-30°C

-60°C

-60°C

25°C

-18°C

30~40

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-60°C



-18℃

-60℃

<http://www.chinaiol.com/cold/s/0824/09200511.html> Top

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WCFX



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HFC-134a

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-110~25℃

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<http://cac.chinaiol.com/s/0921/29201666.html> Top

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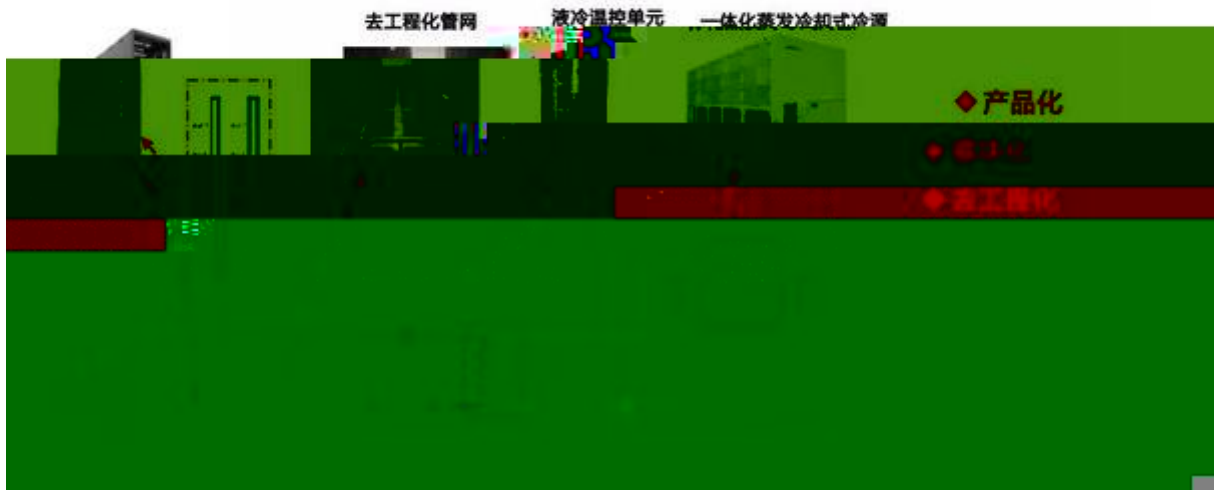
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产品化阶段



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**SHENLING 中美** 数据中心制冷 & 节能整体解决方案专家

SHENLING 中美 打造数据中心 节能降耗 提高效率 降低运营成本

★冷源解决方案★末端解决方案★新机房解决方案★

中国移动通信集团

云基地集装箱项目

澳洲纽银云计算中心项目

昆明恒通铁路

- ◆ 河北保定移动IDC项目
- ◆ 北京蓝汛IDC项目
- ◆ 中国联通阿里巴巴数据中心项目
- ◆ 重庆移动IDC机房改造项目
- ◆ 重庆移动IDC机房改造项目
- ◆ 深圳联通机房项目
- ◆ 上海电信南汇机房改造项目
- ◆ 广州汽车集团设备有限公司(二期)机房项目
- ◆ 广东移动IDC机房改造项目
- ◆ .....

<http://cac.chinaiol.com/s/0920/32201604.html> Top

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8°C

4°C

50°C

2019

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<http://cac.chinaiol.com/s/0829/17200722.html> Top

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12

7 16

Alabama Baldwin

---

	65000		2019	2
	Loxley		62	
	1100			
Kaishan USA	CEO, Keith Schumacher	“		
Loxley				”
“				
		”		
“	Loxley	”Loxley	Billy Middleton	“
				”
Baldwin	CEO Lee Lawson		Baldwin	
			2017	Baldwin
MSA	11	3		SmartAsset
2009			“	”

<http://www.compressoronline.cn/index.php?m=content&c=index&a=show&catid=107&id=8073>

---

15 TM

2018 7

TM

“

”

TM

<http://www.compressoronline.cn/index.php?m=content&c=index&a=show&catid=107&id=8130> Top

16 7

2018

69

7

69

7

7

<http://www.compressoronline.cn/index.php?m=content&c=index&a=show&catid=106&id=8068> Top

17

2018 7

-

,

5

2007

100

-

Nicolas Bonleux

“

1840

BPRT SHRT

“

” “ ”

16GW

20GW

21.08

/

“ ” “ ”

<http://www.compressoronline.cn/index.php?m=content&c=index&a=show&catid=106&id=8062> Top

19

1.6

GE

ATB

SIR

OLI

GE

1.6

“SIM”

SIM

GE

1750

100%

100%

10

SIM

GE

SIM

SIM

1+1

2

4.0

20

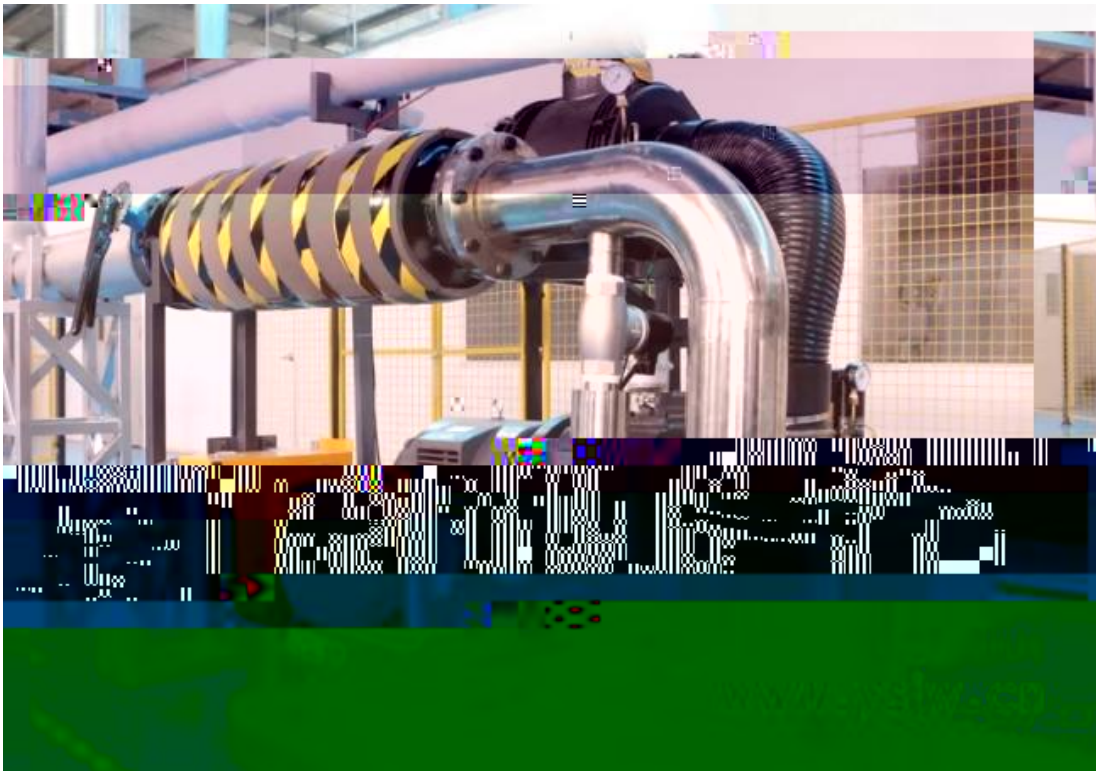
“

”

1.5

50

3



6

5%



2.5

1.3

4

8

1.2

8

<https://www.yshw.cn/news/show-2805.html> Top

22

|

8 17

18

1

2017 12 27

1120

1080

100

4 8GW

2018

45GW

83GW

63 2

TOP10

67 2017 55  
7 2 2  
7  
1 7 51 8 800  
10 5 2 2 1 7  
16 1 29 8  
43 90 17 0  
5 4 2 2  
21 2 139 1  
8 16  
Buffalo  
2016 26 SolarCity  
SolarCity  
SolarCity · ElonMusk  
SolarCity 6  
9 SolarCity 12  
HomeDepot SolarCity  
2015 SolarCity 253  
76

72

**9 19**

**16**

1 246 066 96

12 24

91 935 44

16 14

88 994 56

15 85

Buffalo

2016

26

SolarCity

SolarCity

2017 8

Buffalo

SolarCity

.

Elon Musk

SolarCity

6

9

SolarCity

12

Home Depot

SolarCity

2015

SolarCity

253

76

<https://solar.ofweek.com/2018-08/ART-260008-8460-30258505.html> Top

24

8 18

12

11

25

<https://solar.ofweek.com/2018-08/ART-260002-8460-30258622.html> Top

25

3GW

3 3GW

2018

2012

COMSYS

200

47

3 3GW

430

350

PID

PERC

PERC

PERC

“

”

<https://solar.ofweek.com/2018-08/ART-260008-8460-30257388.html> Top

26

“

”

“

”

“ ”

“

”

8+12

“ ”

“ ” “ ” “ ”

“ ” 2018 3 2 4 3  
3 6 25 3  
7 21 4 “ ”  
8 12 —

2019 1

[http://www.semi.org.cn/news/news\\_show.aspx?ID=53702&classid=117](http://www.semi.org.cn/news/news_show.aspx?ID=53702&classid=117) Top

27 “ ”

8 13

PowerPC CPU

PowerPC

C\*Core CPU

C2000/C8000/C9000

CPU

“ ”

2014 9

3

2017

67

1188

4

5%

11

3200

350

6

28

12

1987

2

6

2

4

[http://www.semi.org.cn/news/news\\_show.aspx?ID=53678&classid=117](http://www.semi.org.cn/news/news_show.aspx?ID=53678&classid=117) Top

28

7 30

7 30





2210

70

2210

“ ”

“

2018 6

2210

1054

60

326

569

31

674

5

150

”

2017

2018 -2019

100

594

“

31

9 5 --

Hydrogen Council

Air Products

SINOPEC

(thyssenkrupp)

15

(Mitsubishi Heavy Industries) Re-Fire

7

Re-Fire

2017

Anglo American plc

Air Liquide

Iwatani

Linde

Shell

Statoil

Total

18%

6Gt

2.5

3000





65°C      125°C

RC2-Z LB LT RG

LB

LT

LB-PLUS

LB-PLUS

-35~0°C

LT

COP      26%

LT-S-L

LT

LT-S-L

8%

10%

1

2

3





LT-S-L

LT

:

1

2

3

1-18°C —LB VS RC2

2-35°C —LB VS LT

3 — VS LT

1

2

3

1 RC2-G R134a 80°C 15°C

2 LT-S-H R134a 90°C 15°C

3 RC2-T 100°C

4 LT-S-A -35°C 60°C

1

2

3

:

Top

4

342.00

4.70%

2018-07-04

7 2

832605

342.00

4.70%

,3,420,000.00

,0

2018 6 29

2018 12 28

,

,

2017 12 31

2.31

1.23

7017.03

20.83%

793.00

29.38%

002158

Top

5 2018

2018-07-11

973

2017

2020

1000

17

2018 2

—

2018 5

Mirai



DCDC FCU



Ballard Plug Power Hydrogenics

Doosan

EWII

.....

TE

Connectivity

.....

300

4 20-21

2018

TrendBank

TrendBank

unima

/

Top

6

2018-07-17

Wind

2016 5 31

2016 7

11 45.79%

39.68

2016 7

12

2018 7 13

48.41%

42.94

2016

9

4

5

5

2

,3



17897

1418

2020

21.7%

30% 14

12

289

290.7 21.2% 29.5%

12.4%

Top

7 A

5

2018-07-18

1

MLF

1:1 MLF

AA+

AA

AA+

2

3

“

”

18

“

”

T3

4

“ ”

5

IPO

IPO

IPO

6

CSX

6 13

2 1

60

1227.90

1% 68.76

600

0.5%

387.06

2800

OLED

8

15%

3275

2000

(7.63 +0.93%, )

(5.61 -0.71%, )

7 17

11680 /

41.08%

12500 /

(7.28 +6.43%, )

(5.24 +0.58%, )

18

“ ”

“ ”

“ ”

2016 1

(9.50 +2.26%,



(5.66 +2.91%, )			
(7.49 +0.00%, )		50%	
(8.79 +1.38%, )	7.25		49%
(0.00 +0.00%, )	4.71		
(5.18 -0.77%, )	1.66	PPP	
A(7.94 +2.19%, )			
(44.40 +0.93%, )	6.6		
(4.26 +0.95%, )	1.83		
(0.00 +0.00%, )	1.8		
(15.20 +3.33%, )		6	
(3.60 +3.75%, )	7.36		
(15.81 +2.60%, )			
(19.40 +0.00%, )		(5.50 -0.90%, )	
.....	Top		

8

2018-07-20

2017 1418 2018 2158

4700



A

1

002463

PCB

( )

(27.42%)

603306 ( )

,

603799

002158

1943

1969-1994

1994

2011 11

000536

2005

1971

1989

2008

44.51 /

60

A

300260

ASME BPE

603922

2003 ,

,

ED

603929

2002

2008

IC

603160

2002







“ ”

A

LKJ15S

◇

300 /

1000 /

Top

12

2018-08-30

3

		11-7	2018 021
		18 F 1-1 1-2	2018 022
	23 25	1	2018 023

Top

14 “ ” A

2018-08-22

[ ] 8:30

1. “ ” A 5
2. A 6
3. 5
- 4.[ ]
- 5.PTA 40% 4
6. 5G 6 5G
7. 4
- “ ” A 5  
( “ ”)6 29
- 8 ( ) ( “ ”)  
IPO  
A

002371                      300604                      300666                      603690

603929

A                      6

300                      500

“

”                      50

A

50

50

600030

600036

601211

601288

601318

601336

5

“                      ”

30% 2021

18.7

002065

300075

300212

600171

600602

[                      ]

0.8%

0.5%

0.9%

(CNH)

04:59 6.8351

PTA 40% 4

PTA PTA1809 PTA1809

2500 40% PTA1809 4.58%

PTA -PTA

PTA 000703 002493 600346 601233

5G 6 5G

8 20

5G

5G

4 5G

5G

2018

5G

5G 300570 002913 603559 300312

300563 002792

4

2017

1200

1.3

20%

2020

4700

75%

“

GDP

”

2030 15.7 GDP 7

2035 27% GDP 27

3 2018 8 24

2018 8 24 2729.43 0.18% 8484.74

0.20% 1044.38 0.25%

4 2018 8 24

5 2018 8 24

5.1

002529 2018

17111.61 0.46%

2618.12 0.56%

ST 600421 2018

-34104.54 100.20% -339.52

002613 2018

6.25 41.81% 1.01 542.86%

0.76 393.33% 0.0813

393.50% 5.14%

000903 2018

---

	318941.73	9.47%	20323.01	
19.98%	20303.63	4.63%		17650.49
	5.93%			
	300193		2018	
	45116.07		12.49%	10262.47
	21.46%		8634.50	
20.68%				
	603855		2018	
	67199.76		21.99%	
5543.33		72.83%		
	4258.86	48.02%		
	300210		2018	

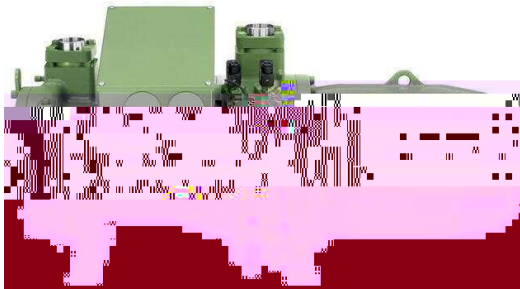
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	5.80%	0.92%		
	603277		2018	2018
	68616.60		3.51%	
11648.39		0.83%	.....	Top

16

2018-08-27

1994				
1997	Hailfingen		EEC1836/93	
1998				
1999	CO2			CSH
2003		ESH7		
2003		CO2		
2005				
2008				
2009	R410A	/		
2009	CSW		R134a	
2009	HSK			
2010	R134a		ECOLINE	CSH
2010	2600		5	



1

1968

UL CE

PED

ISO-9001

2004 039

2005 2 23 ,

(2005)29 , 130 , HERMES EQUITIES CORP.

CAPITAL HARVEST TECHNOLOGY LIMITED 65

2005 2020 2005 5

, (2005)34 , HERMESEQUITIES

CORP. 3.75 ( 0.75%),

1.25 1.25

CAPITAL HARVEST TECHNOLOGY LIMITED

3.75 ( 0.75%)

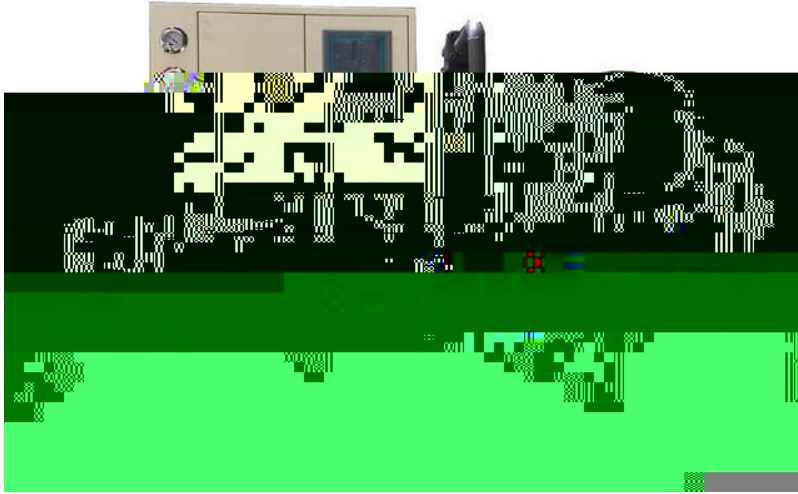
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2005 5 30

024506

4





<https://baijiahao.baidu.com/s?id=1608949480644837003&wfr=spider&for=pc> Top

17

2018-08-29

7.2%

7

	2018	7	11123	45.28%	8745
	26.74%		479	38.84%	1383
2.47%	2018	6	548	28.34%	3198





