



“顶流”基金大佬认为市场阶段性无底



富国基金朱少醒:再对市场过度悲观已经没有意义。
中邮基金国晓雯:短期我们认为3000点为市场阶段性底部!
银华基金李晓星:我们总体上对于权益市场非常看好。
广发基金刘格菘:市场出现了明显的底部特征。
景顺长城杨锐文:市场自我怀疑的时候,这个市场就见底了。
中欧基金周蔚文:一部分赛道股基本已经完成调整,泡沫很小。

国内一众“顶流”基金大佬在一季报中普遍认为,市场阶段性底部到了。

富国基金朱少醒在富国天惠一季报中坦言,站在当前的时点去分析短期的市场环境,的确很难推出乐观的结论。如果把眼光放到更长的时间维度,再对市场过度悲观已经没有意义。

同样不悲观的还有银华基金的李晓星,他在季报中用5700字阐释:“我们总体上对于权益市场非常看好,并认为后面经济的增长会强于市场的预期。”

广发基金刘格菘也发声:“随着一季度金融委会议的召开,市场出现了明显的底部特征。从中长期的角度看,我们对市场并不悲观。”

“短期我们认为3000点为市场阶段性底部。”中邮基金国晓雯表示,对于成长股,只要标的的业绩不大幅下修,年底会有显著的绝对收益。

广发基金刘格菘也表示,从产业发展以及中长期投资的角度思考,当前A股市场具备投资价值的行业非常多,希

望基金投资人能够保持耐心。

赵蓓、蔡嵩松两位赛道型选手,在一季报中呈现出不同的调仓思路。赵蓓目前休假,其基金暂由谭冬寒代为管理。以工银前沿医疗为例,在仓位选择上,年初估值较高有待消化之时,该基金降低到最低仓位。3月份以后估值有了大幅消化,基金对仓位做了增加。

而在诺安创新驱动一季报中,可以明确看出,蔡嵩松进军“东数西算”了。卫士通、旗天科技、数字认证、京北方、新国都、浪潮软件、数据港、科蓝软件、普联软件、宝兰德,与2021年末相比,诺安创新驱动的十大重仓股“完全换血”,当前无一不是与“东数西算”有关的个股。

蔡嵩松表示,从细分板块来看,东数西算、数字经济、人工智能、行业估值等都是可以自上而下把握的机会,行业估值较低,产业基本面上出现拐点,就是其最大的投资逻辑。

不过,蔡嵩松的诺安成长一季度的十大重仓股,依旧是清一色的半导体股。 ■ 杨晓春

证券要闻

证券金融四大部门同发声 积极支持资本市场平稳运行 吸引更多证券投资

4月22日,人民银行、银保监会、证监会、外汇局分别传达学习贯彻国务院金融委专题会议精神,研究部署下一步工作。会议内容对资本市场、货币政策、外汇领域改革等市场关注的重点话题均有提及。业内专家表示,展望后续,我国经济金融保持着良好的韧性和活力,长期向好的基本面不会改变。

银保监会提出,积极支持资本市场平稳运行,促进资本双向流动,吸引更多外

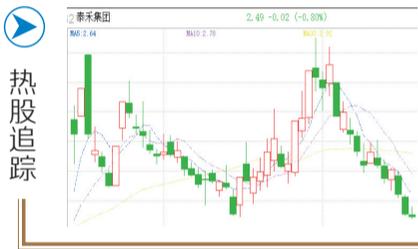
商直接投资和证券投资。

证监会强调,要及时回应市场关切,引导市场预期,激发市场活力、潜力,进一步提升市场韧性,促进资本市场平稳健康运行。

市场人士预期,未来在深化境内外市场互联互通、进一步扩大投资范围和标的、加强监管合作等方面,监管部门将进一步“出招”提升市场吸引力。

■ 中国证券报

泰禾集团“业绩雷”炸响 从预盈变巨亏46亿!



泰禾集团炸响“业绩雷”。4月22日晚,泰禾集团下修2021年业绩预告,预计亏损35亿元~46亿元。回想今年1月底,公司还预计盈利1.01亿元~1.32亿元。

截至4月22日泰禾集团最新总市值为62亿元。有投资者这样评论巨额亏损,“差点把市值亏光!”

■ 海雪峰

热股追踪

科创新材今日申购:中购代码:8989666,中购价格:4.60元,申购上限:95万股;

- 美凯龙:拟1.5亿元至3亿元回购;
- 益丰药房:2.04亿元收购湖南九芝堂51%股权;
- ST安中:控股股东申请破产重整;
- 万孚生物:一季度净利同比增长481%;
- 新钢股份:实控人将变更为国务院国资委;
- 靖远煤电:拟购买窑煤集团,拓宽

公告速递

- 煤炭领域布局;
- 西部矿业:一季度净利润预增57%,铜精矿价格上涨;
- 芒果超媒:一季度净利润5.07亿元,同比下降34%;
- 星华反光:拟每10股派息20元转增10股;
- 金海高科:2021年营收7.58亿元,同比增长9.27%;
- 金地集团:2021年度净利润同比下滑9.5%。

■ 第一财经

分类广告

市场星报 国内统一刊号:CN34-0082
 广告刊登热线:0551-62860702 15395123255
 0:174016812

全省发行,每天均可见报,欢迎刊登
 温馨提示:交易双方请核实对方有效证件,并留存复印件,本栏目所刊登广告不作为任何法律依据,由发布单位自行承担相关法律责任。

遗失声明
 安徽云制冷设备有限公司(统一社会信用代码:91340100MA2N0KNN1H)因经营需要,经股东会决议向市场监督管理部门申请减少注册资本,由人民币1000万元减少至人民币500万元,自公告之日起45日内向市场监督管理部门或相应登记机关办理变更登记,特此公告。

遗失声明
 本人魏志文,身份证号:340102198701100000,于2022年4月22日不慎将本人持有的安徽云制冷设备有限公司公章一枚(公章编号:00118897)遗失,声明作废旧章,特此公告。

减资公告
 安徽星洲建筑装饰有限公司(统一社会信用代码:91340100MA2N0KNN1H)因经营需要,经股东会决议向市场监督管理部门申请减少注册资本,由人民币1000万元减少至人民币500万元,自公告之日起45日内向市场监督管理部门或相应登记机关办理变更登记,特此公告。

减资公告
 合肥胜邦科技发展有限公司(统一社会信用代码:91340122MA2T64DX39)因经营需要,经股东会决议向市场监督管理部门申请减少注册资本,由人民币200万元减少至人民币100万元,自公告之日起45日内向市场监督管理部门或相应登记机关办理变更登记,特此公告。

遗失声明
 院AV1A67,院AX6832,院AX6833,院AX6834,院AX6835,院AX6836,院AX6837,院AX6838,院AX6839,院AX6840,院AX6841,院AX6842,院AX6843,院AX6844,院AX6845,院AX6846,院AX6847,院AX6848,院AX6849,院AX6850,院AX6851,院AX6852,院AX6853,院AX6854,院AX6855,院AX6856,院AX6857,院AX6858,院AX6859,院AX6860,院AX6861,院AX6862,院AX6863,院AX6864,院AX6865,院AX6866,院AX6867,院AX6868,院AX6869,院AX6870,院AX6871,院AX6872,院AX6873,院AX6874,院AX6875,院AX6876,院AX6877,院AX6878,院AX6879,院AX6880,院AX6881,院AX6882,院AX6883,院AX6884,院AX6885,院AX6886,院AX6887,院AX6888,院AX6889,院AX6890,院AX6891,院AX6892,院AX6893,院AX6894,院AX6895,院AX6896,院AX6897,院AX6898,院AX6899,院AX6900,院AX6901,院AX6902,院AX6903,院AX6904,院AX6905,院AX6906,院AX6907,院AX6908,院AX6909,院AX6910,院AX6911,院AX6912,院AX6913,院AX6914,院AX6915,院AX6916,院AX6917,院AX6918,院AX6919,院AX6920,院AX6921,院AX6922,院AX6923,院AX6924,院AX6925,院AX6926,院AX6927,院AX6928,院AX6929,院AX6930,院AX6931,院AX6932,院AX6933,院AX6934,院AX6935,院AX6936,院AX6937,院AX6938,院AX6939,院AX6940,院AX6941,院AX6942,院AX6943,院AX6944,院AX6945,院AX6946,院AX6947,院AX6948,院AX6949,院AX6950,院AX6951,院AX6952,院AX6953,院AX6954,院AX6955,院AX6956,院AX6957,院AX6958,院AX6959,院AX6960,院AX6961,院AX6962,院AX6963,院AX6964,院AX6965,院AX6966,院AX6967,院AX6968,院AX6969,院AX6970,院AX6971,院AX6972,院AX6973,院AX6974,院AX6975,院AX6976,院AX6977,院AX6978,院AX6979,院AX6980,院AX6981,院AX6982,院AX6983,院AX6984,院AX6985,院AX6986,院AX6987,院AX6988,院AX6989,院AX6990,院AX6991,院AX6992,院AX6993,院AX6994,院AX6995,院AX6996,院AX6997,院AX6998,院AX6999,院AX7000,院AX7001,院AX7002,院AX7003,院AX7004,院AX7005,院AX7006,院AX7007,院AX7008,院AX7009,院AX7010,院AX7011,院AX7012,院AX7013,院AX7014,院AX7015,院AX7016,院AX7017,院AX7018,院AX7019,院AX7020,院AX7021,院AX7022,院AX7023,院AX7024,院AX7025,院AX7026,院AX7027,院AX7028,院AX7029,院AX7030,院AX7031,院AX7032,院AX7033,院AX7034,院AX7035,院AX7036,院AX7037,院AX7038,院AX7039,院AX7040,院AX7041,院AX7042,院AX7043,院AX7044,院AX7045,院AX7046,院AX7047,院AX7048,院AX7049,院AX7050,院AX7051,院AX7052,院AX7053,院AX7054,院AX7055,院AX7056,院AX7057,院AX7058,院AX7059,院AX7060,院AX7061,院AX7062,院AX7063,院AX7064,院AX7065,院AX7066,院AX7067,院AX7068,院AX7069,院AX7070,院AX7071,院AX7072,院AX7073,院AX7074,院AX7075,院AX7076,院AX7077,院AX7078,院AX7079,院AX7080,院AX7081,院AX7082,院AX7083,院AX7084,院AX7085,院AX7086,院AX7087,院AX7088,院AX7089,院AX7090,院AX7091,院AX7092,院AX7093,院AX7094,院AX7095,院AX7096,院AX7097,院AX7098,院AX7099,院AX7100,院AX7101,院AX7102,院AX7103,院AX7104,院AX7105,院AX7106,院AX7107,院AX7108,院AX7109,院AX7110,院AX7111,院AX7112,院AX7113,院AX7114,院AX7115,院AX7116,院AX7117,院AX7118,院AX7119,院AX7120,院AX7121,院AX7122,院AX7123,院AX7124,院AX7125,院AX7126,院AX7127,院AX7128,院AX7129,院AX7130,院AX7131,院AX7132,院AX7133,院AX7134,院AX7135,院AX7136,院AX7137,院AX7138,院AX7139,院AX7140,院AX7141,院AX7142,院AX7143,院AX7144,院AX7145,院AX7146,院AX7147,院AX7148,院AX7149,院AX7150,院AX7151,院AX7152,院AX7153,院AX7154,院AX7155,院AX7156,院AX7157,院AX7158,院AX7159,院AX7160,院AX7161,院AX7162,院AX7163,院AX7164,院AX7165,院AX7166,院AX7167,院AX7168,院AX7169,院AX7170,院AX7171,院AX7172,院AX7173,院AX7174,院AX7175,院AX7176,院AX7177,院AX7178,院AX7179,院AX7180,院AX7181,院AX7182,院AX7183,院AX7184,院AX7185,院AX7186,院AX7187,院AX7188,院AX7189,院AX7190,院AX7191,院AX7192,院AX7193,院AX7194,院AX7195,院AX7196,院AX7197,院AX7198,院AX7199,院AX7200,院AX7201,院AX7202,院AX7203,院AX7204,院AX7205,院AX7206,院AX7207,院AX7208,院AX7209,院AX7210,院AX7211,院AX7212,院AX7213,院AX7214,院AX7215,院AX7216,院AX7217,院AX7218,院AX7219,院AX7220,院AX7221,院AX7222,院AX7223,院AX7224,院AX7225,院AX7226,院AX7227,院AX7228,院AX7229,院AX7230,院AX7231,院AX7232,院AX7233,院AX7234,院AX7235,院AX7236,院AX7237,院AX7238,院AX7239,院AX7240,院AX7241,院AX7242,院AX7243,院AX7244,院AX7245,院AX7246,院AX7247,院AX7248,院AX7249,院AX7250,院AX7251,院AX7252,院AX7253,院AX7254,院AX7255,院AX7256,院AX7257,院AX7258,院AX7259,院AX7260,院AX7261,院AX7262,院AX7263,院AX7264,院AX7265,院AX7266,院AX7267,院AX7268,院AX7269,院AX7270,院AX7271,院AX7272,院AX7273,院AX7274,院AX7275,院AX7276,院AX7277,院AX7278,院AX7279,院AX7280,院AX7281,院AX7282,院AX7283,院AX7284,院AX7285,院AX7286,院AX7287,院AX7288,院AX7289,院AX7290,院AX7291,院AX7292,院AX7293,院AX7294,院AX7295,院AX7296,院AX7297,院AX7298,院AX7299,院AX7300,院AX7301,院AX7302,院AX7303,院AX7304,院AX7305,院AX7306,院AX7307,院AX7308,院AX7309,院AX7310,院AX7311,院AX7312,院AX7313,院AX7314,院AX7315,院AX7316,院AX7317,院AX7318,院AX7319,院AX7320,院AX7321,院AX7322,院AX7323,院AX7324,院AX7325,院AX7326,院AX7327,院AX7328,院AX7329,院AX7330,院AX7331,院AX7332,院AX7333,院AX7334,院AX7335,院AX7336,院AX7337,院AX7338,院AX7339,院AX7340,院AX7341,院AX7342,院AX7343,院AX7344,院AX7345,院AX7346,院AX7347,院AX7348,院AX7349,院AX7350,院AX7351,院AX7352,院AX7353,院AX7354,院AX7355,院AX7356,院AX7357,院AX7358,院AX7359,院AX7360,院AX7361,院AX7362,院AX7363,院AX7364,院AX7365,院AX7366,院AX7367,院AX7368,院AX7369,院AX7370,院AX7371,院AX7372,院AX7373,院AX7374,院AX7375,院AX7376,院AX7377,院AX7378,院AX7379,院AX7380,院AX7381,院AX7382,院AX7383,院AX7384,院AX7385,院AX7386,院AX7387,院AX7388,院AX7389,院AX7390,院AX7391,院AX7392,院AX7393,院AX7394,院AX7395,院AX7396,院AX7397,院AX7398,院AX7399,院AX7400,院AX7401,院AX7402,院AX7403,院AX7404,院AX7405,院AX7406,院AX7407,院AX7408,院AX7409,院AX7410,院AX7411,院AX7412,院AX7413,院AX7414,院AX7415,院AX7416,院AX7417,院AX7418,院AX7419,院AX7420,院AX7421,院AX7422,院AX7423,院AX7424,院AX7425,院AX7426,院AX7427,院AX7428,院AX7429,院AX7430,院AX7431,院AX7432,院AX7433,院AX7434,院AX7435,院AX7436,院AX7437,院AX7438,院AX7439,院AX7440,院AX7441,院AX7442,院AX7443,院AX7444,院AX7445,院AX7446,院AX7447,院AX7448,院AX7449,院AX7450,院AX7451,院AX7452,院AX7453,院AX7454,院AX7455,院AX7456,院AX7457,院AX7458,院AX7459,院AX7460,院AX7461,院AX7462,院AX7463,院AX7464,院AX7465,院AX7466,院AX7467,院AX7468,院AX7469,院AX7470,院AX7471,院AX7472,院AX7473,院AX7474,院AX7475,院AX7476,院AX7477,院AX7478,院AX7479,院AX7480,院AX7481,院AX7482,院AX7483,院AX7484,院AX7485,院AX7486,院AX7487,院AX7488,院AX7489,院AX7490,院AX7491,院AX7492,院AX7493,院AX7494,院AX7495,院AX7496,院AX7497,院AX7498,院AX7499,院AX7500,院AX7501,院AX7502,院AX7503,院AX7504,院AX7505,院AX7506,院AX7507,院AX7508,院AX7509,院AX7510,院AX7511,院AX7512,院AX7513,院AX7514,院AX7515,院AX7516,院AX7517,院AX7518,院AX7519,院AX7520,院AX7521,院AX7522,院AX7523,院AX7524,院AX7525,院AX7526,院AX7527,院AX7528,院AX7529,院AX7530,院AX7531,院AX7532,院AX7533,院AX7534,院AX7535,院AX7536,院AX7537,院AX7538,院AX7539,院AX7540,院AX7541,院AX7542,院AX7543,院AX7544,院AX7545,院AX7546,院AX7547,院AX7548,院AX7549,院AX7550,院AX7551,院AX7552,院AX7553,院AX7554,院AX7555,院AX7556,院AX7557,院AX7558,院AX7559,院AX7560,院AX7561,院AX7562,院AX7563,院AX7564,院AX7565,院AX7566,院AX7567,院AX7568,院AX7569,院AX7570,院AX7571,院AX7572,院AX7573,院AX7574,院AX7575,院AX7576,院AX7577,院AX7578,院AX7579,院AX7580,院AX7581,院AX7582,院AX7583,院AX7584,院AX7585,院AX7586,院AX7587,院AX7588,院AX7589,院AX7590,院AX7591,院AX7592,院AX7593,院AX7594,院AX7595,院AX7596,院AX7597,院AX7598,院AX7599,院AX7600,院AX7601,院AX7602,院AX7603,院AX7604,院AX7605,院AX7606,院AX7607,院AX7608,院AX7609,院AX7610,院AX7611,院AX7612,院AX7613,院AX7614,院AX7615,院AX7616,院AX7617,院AX7618,院AX7619,院AX7620,院AX7621,院AX7622,院AX7623,院AX7624,院AX7625,院AX7626,院AX7627,院AX7628,院AX7629,院AX7630,院AX7631,院AX7632,院AX7633,院AX7634,院AX7635,院AX7636,院AX7637,院AX7638,院AX7639,院AX7640,院AX7641,院AX7642,院AX7643,院AX7644,院AX7645,院AX7646,院AX7647,院AX7648,院AX7649,院AX7650,院AX7651,院AX7652,院AX7653,院AX7654,院AX7655,院AX7656,院AX7657,院AX7658,院AX7659,院AX7660,院AX7661,院AX7662,院AX7663,院AX7664,院AX7665,院AX7666,院AX7667,院AX7668,院AX7669,院AX7670,院AX7671,院AX7672,院AX7673,院AX7674,院AX7675,院AX7676,院AX7677,院AX7678,院AX7679,院AX7680,院AX7681,院AX7682,院AX7683,院AX7684,院AX7685,院AX7686,院AX7687,院AX7688,院AX7689,院AX7690,院AX7691,院AX7692,院AX7693,院AX7694,院AX7695,院AX7696,院AX7697,院AX7698,院AX7699,院AX7700,院AX7701,院AX7702,院AX7703,院AX7704,院AX7705,院AX7706,院AX7707,院AX7708,院AX7709,院AX7710,院AX7711,院AX7712,院AX7713,院AX7714,院AX7715,院AX7716,院AX7717,院AX7718,院AX7719,院AX7720,院AX7721,院AX7722,院AX7723,院AX7724,院AX7725,院AX7726,院AX7727,院AX7728,院AX7729,院AX7730,院AX7731,院AX7732,院AX7733,院AX7734,院AX7735,院AX7736,院AX7737,院AX7738,院AX7739,院AX7740,院AX7741,院AX7742,院AX7743,院AX7744,院AX7745,院AX7746,院AX7747,院AX7748,院AX7749,院AX7750,院AX7751,院AX7752,院AX7753,院AX7754,院AX7755,院AX7756,院AX7757,院AX7758,院AX7759,院AX7760,院AX7761,院AX7762,院AX7763,院AX7764,院AX7765,院AX7766,院AX7767,院AX7768,院AX7769,院AX7770,院AX7771,院AX7772,院AX7773,院AX7774,院AX7775,院AX7776,院AX7777,院AX7778,院AX7779,院AX7780,院AX7781,院AX7782,院AX7783,院AX7784,院AX7785,院AX7786,院AX7787,院AX7788,院AX7789,院AX7790,院AX7791,院AX7792,院AX7793,院AX7794,院AX7795,院AX7796,院AX7797,院AX7798,院AX7799,院AX7800,院AX7801,院AX7802,院AX7803,院AX7804,院AX7805,院AX7806,院AX7807,院AX7808,院AX7809,院AX7810,院AX7811,院AX7812,院AX7813,院AX7814,院AX7815,院AX7816,院AX7817,院AX7818,院AX7819,院AX7820,院AX7821,院AX7822,院AX7823,院AX7824,院AX7825,院AX7826,院AX7827,院AX7828,院AX7829,院AX7830,院AX7831,院AX7832,院AX7833,院AX7834,院AX7835,院AX7836,院AX7837,院AX7838,院AX7839,院AX7840,院AX7841,院AX7842,院AX7843,院AX7844,院AX7845,院AX7846,院AX7847,院AX7848,院AX7849,院AX7850,院AX7851,院AX7852,院AX7853,院AX7854,院AX7855,院AX7856,院AX7857,院AX7858,院AX7859,院AX7860,院AX7861,院AX7862,院AX7863,院AX7864,院AX7865,院AX7866,院AX7867,院AX7868,院AX7869,院AX7870,院AX7871,院AX7872,院AX7873,院AX7874,院AX7875,院AX7876,院AX7877,院AX7878,院AX7879,院AX7880,院AX7881,院AX7882,院AX7883,院AX7884,院AX7885,院AX7886,院AX7887,院AX7888,院AX7889,院AX7890,院AX7891,院AX7892,院AX7893,院AX7894,院AX7895,院AX7896,院AX7897,院AX7898,院AX7899,院AX7900,院AX7901,院AX7902,院AX7903,院AX7904,院AX7905,院AX7906,院AX7907,院AX7908,院AX7909,院AX7910,院AX7911,院AX7912,院AX7913,院AX7914,院AX7915,院AX7916,院AX7917,院AX7918,院AX7919,院AX7920,院AX7921,院AX7922,院AX7923,院AX7924,院AX7925,院AX7926,院AX7927,院AX7928,院AX7929,院AX7930,院AX7931,院AX7932,院AX7933,院AX7934,院AX7935,院AX7936,院AX7937,院AX7938,院AX7939,院AX7940,院AX7941,院AX7942,院AX7943,院AX7944,院AX7945,院AX7946,院AX7947,院AX7948,院AX7949,院AX7950,院AX7951,院AX7952,院AX7953,院AX7954,院AX7955,院AX7956,院AX7957,院AX7958,院AX7959,院AX7960,院AX7961,院AX7962,院AX7963,院AX7964,院AX7965,院AX7966,院AX7967,院AX7968,院AX7969,院AX7970,院AX7971,院AX7972,院AX7973,院AX7974,院AX7975,院AX7976,院AX7977,院AX7978,院AX7979,院AX7980,院AX7981,院AX7982,院AX7983,院AX7984,院AX7985,院AX7986,院AX7987,院AX7988,院AX7989,院AX7990,院AX7991,院AX7992,院AX7993,院AX7994,院AX7995,院AX7996,院AX7997,院AX7998,院AX7999,院AX8000,院AX8001,院AX8002,院AX8003,院AX8004,院AX8005,院AX8006,院AX8007,院AX8008,院AX8009,院AX8010,院AX8011,院AX8012,院AX8013,院AX8014,院AX8015,院AX8016,院AX8017,院AX8018,院AX8019,院AX8020,院AX8021,院AX8022,院AX8023,院AX8024,院AX8025,院AX8026,院AX8027,院AX8028,院AX8029,院AX8030,院AX8031,院AX8032,院AX8033,院AX8034,院AX8035,院AX8036,院AX8037,院AX8038,院AX8039,院AX8040,院AX8041,院AX8042,院AX8043,院AX8044,院AX8045,院AX8046,院AX8047,院AX8048,院AX8049,院AX8050,院AX8051,院AX8052,院AX8053,院AX8054,院AX8055,院AX8056,院AX8057,院AX8058,院AX8059,院AX8060,院AX8061,院AX8062,院AX8063,院AX8064,院AX8065,院AX8066,院AX8067,院AX8068,院AX8069,院AX8070,院AX8071,院AX8072,院AX8073,院AX8074,院AX8075,院AX8076,院AX8077,院AX8078,院AX8079,院AX8080,院AX8081,院AX8082,院AX8083,院AX8084,院AX8085,院AX8086,院AX8087,院AX8088,院AX8089,院AX8090,院AX8091,院AX8092,院AX8093,院AX8094,院AX8095,院AX8096,院AX8097,院AX8098,院AX8099,院AX8100,院AX8101,院AX8102,院AX8103,院AX8104,院AX8105,院AX8106,院AX8107,院AX8108,院AX8109,院AX8110,院AX8111,院AX8112,院AX811