

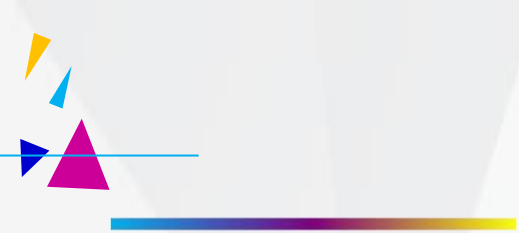


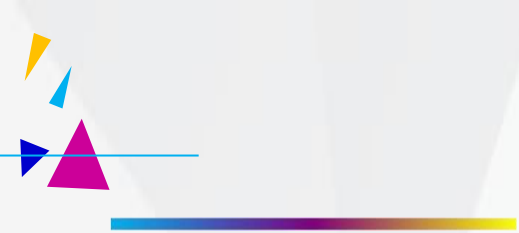
2023

24

363









1.

2.

20

3.

7

3000

25Mbps

4.

5.

JSR

6.

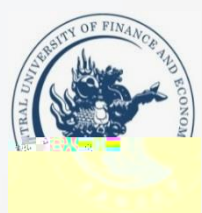
AI

NPU

7.

8.

9.





10.

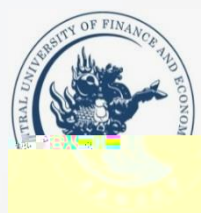
11.

12. **50%**

13. **180**

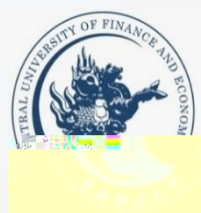
14. **30**

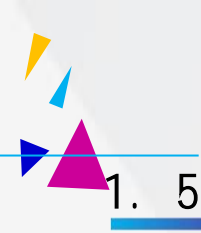
15.





# 1



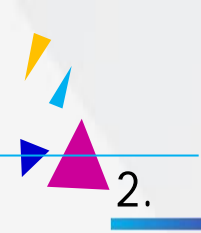


1. 5		7554		
6 28			5	
3019		264		2755
	4535		3136	1399
		7554		3400
4154				
		5		
12. 5		7. 3		16. 8
	2. 85%		2. 73%	2. 95%
1	5		22538	
3568		18970		12841
	8405		4436	
35379			11973	23406
		1	5	
14. 1		8. 1		17. 2
	3. 02%		2. 87%	3. 1%
		1	5	
10418				9695
	723	5		2502
	4559		5	
1143				

[https://h5.newaircloud.com/detailArticle/22030484\\_44458\\_zgcjb.html](https://h5.newaircloud.com/detailArticle/22030484_44458_zgcjb.html)

2023 06 30





## 2. REITs

REITs

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REITs

REITs

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REITs

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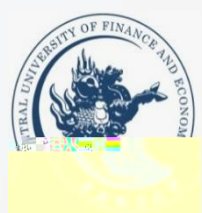
REITs

REITs

2022 5

REITs

REITs







REITs  
REITs

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REITs

28 REITs

REITs

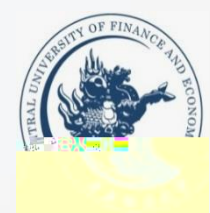
REITs

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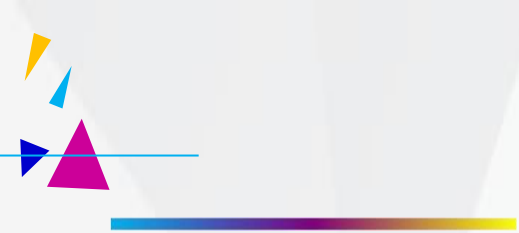
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2023 06 29





	2021	2022	Wind	
6	26	2	21672	
		3.8	57%	
4	3	4911	3357	5298
	5		2647	2754
	5	2022		
2021		5		
				5
		7.5%		3.5
		16.4%		11.5



1.5

“

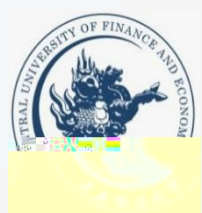
”

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[https://h5.newaircloud.com/detailArticle/22001868\\_44458\\_zgcjb.html](https://h5.newaircloud.com/detailArticle/22001868_44458_zgcjb.html)

2023 06 27





4.

6 26

11

" " 20

100

3

Wind

6 26

2.34%

2016

2021

3

8

2019

2021

213

2.34%

3

2.45%

6 21

54 bp

1 bp=0.01%

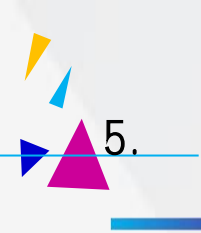
797 bp

7.97%

10%







5.

2023—2030

4

1

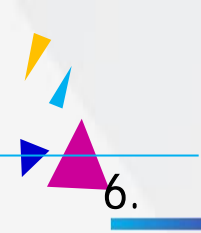
4

6

[https://mp.weixin.qq.com/s/9k\\_U8VI3t-AdCso8iRnJSA](https://mp.weixin.qq.com/s/9k_U8VI3t-AdCso8iRnJSA)

2023 06 27 PPP





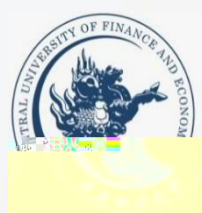
6.

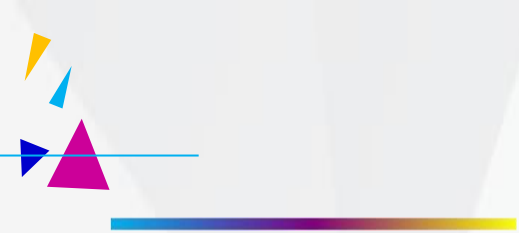
4  
16.4%

53.16

2035

" "





“ ”

[https://h5.newaircloud.com/newspaper/detail/10257\\_132408\\_1580357\\_22018214\\_zgcjb.html](https://h5.newaircloud.com/newspaper/detail/10257_132408_1580357_22018214_zgcjb.html)

2023 06 29







6 25

" " 22



3893

2022 9  
2196  
1648 73%

2022 12

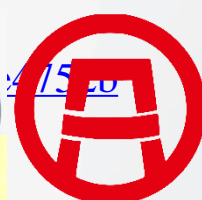
" ' ' "

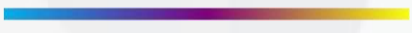
"

" 2020

11

"





6 12 2023

18 18 8 10

2015

PPP

PPP

2015 6

PPP  
2017

10.65

"

"

"

"

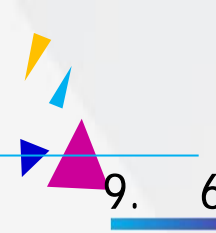
2017 3

"

"

38

[https](https://)



9. 6

1459

2023

393.81

167.35

226.45

179.1

1459.36

283

5 5 7 10 15 20 30  
10—20 BP 35.16

[https://h5.newaircloud.com/newspaper/detail/10257\\_132408\\_1580356\\_22018211\\_zgcjb.html](https://h5.newaircloud.com/newspaper/detail/10257_132408_1580356_22018211_zgcjb.html)

2023 06 29





“ ” “ ”

2023  
12



“ ”

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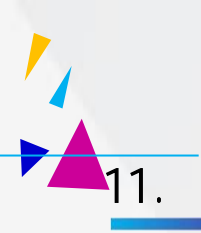
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[https://h5.newaircloud.com/newspaper/detail/10257\\_132408\\_1580360\\_22018242\\_zgcjb.html](https://h5.newaircloud.com/newspaper/detail/10257_132408_1580360_22018242_zgcjb.html)

2023 06 29





11.

5

17

REITs

<https://mp.weixin.qq.com/s/Xb3fKKEPhq6hdx9R7AL5iQ>

2023 06 28 PPP





6 27 20

" "

11

3

6 30

2.34%

2023 6 27 6 29

100



W

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6 27

PPP

4

PPP

PPP

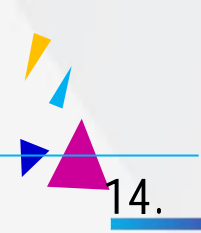
PPP

PPP

24116.19

PPP

9.1



14.

PPP

PPP

40km/h

710m

38m

<https://mp.weixin.qq.com/s/ZinEOtM3Q4GV4LOlSIhX1w>

2023 06 30

PPP





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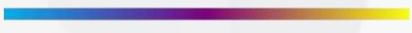
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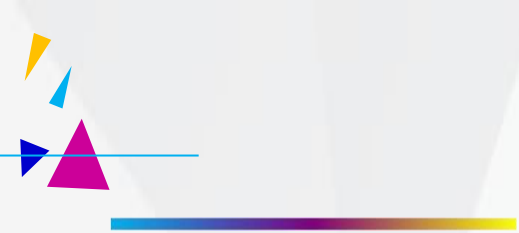
33.26



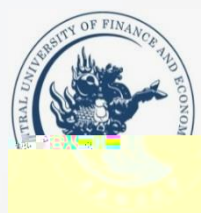
“ ” “ ” “ ” “ ” “ ”

<https://h5.newaircloud.>

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2





2023 6 23

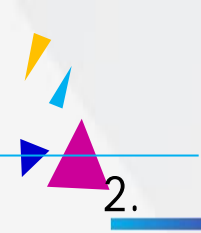
60



22

[http://new.fmprc.gov.cn/web/zyxw/202306/t20230623\\_11102786.shtml](http://new.fmprc.gov.cn/web/zyxw/202306/t20230623_11102786.shtml)  
2023 6 23





2.

20

APP

(IRA)

20

2500

5

2031 9

(UAW)

2050

Lordstown Motors

(RIDE. US)

(EPA)

4

2032

(GM. US)

Stellantis

NV(STLA. US)

(TM. US)

(Alliance for Automotive Innovation)

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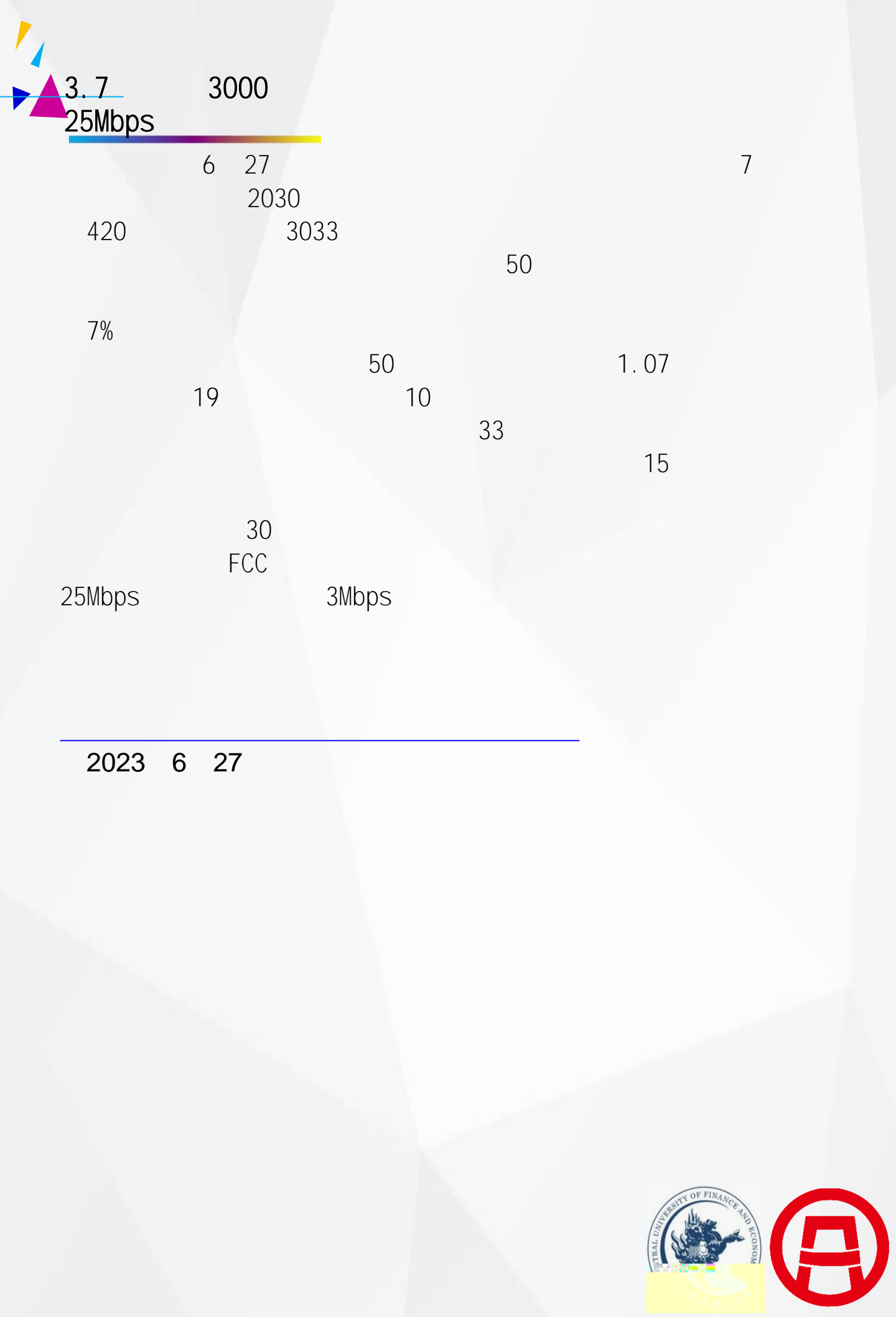
"

<https://www.zhitongcaijing.com/content/detail/952433.html>

2023 6 29







3.7  
25Mbps

3000

6 27

7

2030

420

3033

50

7%

50

1.07

19

10

33

15

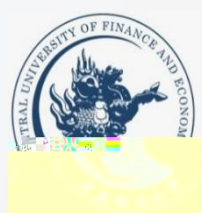
30  
FCC

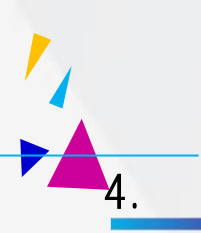
25Mbps

3Mbps

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2023 6 27





4.



1000

2024 3

NIST SP 800-171  
NASA

2020

8.5  
2021 2022

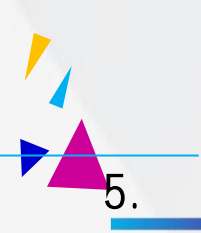
2015

6 20

<https://laoyaoba.com/n/866661>

2023 6 25





5.

JSR

6 26

JIC

JIC

JSR

JSR

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2023 6 26





6.  
NPU

AI

3

“ K- 6 26 ”  
AI

SK

NPU

1000

5.5

2025

PIM

2030

2030  
AI

2028

<https://www.jiemian.com/article/9635385.html>

2023 6 26





7.



6 27

7 4

1 5

10

700

3.9

200

2

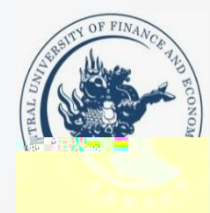
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<https://www.jiemian.com/article/9639985.html>

2023 6 27





8.



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100

2016 8

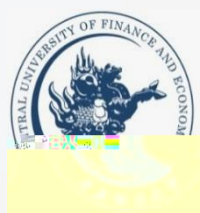
7

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<https://www.yangtse.com/zncontent/3044569.html>

2023 6 29





9.



6 28

20%

5000

27.5

8.25

50%

2024

2023 6 28





10.



6 30

12

7.7

2022

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2028

2033

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1967

2020 2

2030

<https://www.yangtse.com/zncontent/3048401.html>

2023 6 30







6 25

AIT

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12.

50%

APP

114%

S&P Merval

3%

50%

10

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2024

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6

100%

C(

<https://www.zhitongcaijing.com/content/detail/951296.html>

2023 6 27





19

APP

2000



14.

30

IMF  
9

6 29

SBA

22.5

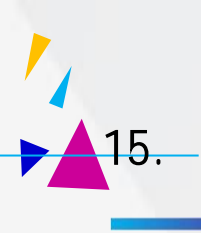
30

7

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2023 6 30





15.



6 30

29

(Rosatom)

Urani um One Group

(Citic Guoan Group)

14

<https://www.escn.com.cn/20230701/72c78dc5a3074e2590dd47e3892c5951/c.html>

2023 7 1

