

2025

4

100

002158



10

	.....	17
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( )

( )

	.....	39
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1	10	50
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2025-7-7

50

EDA

10

5

50

<https://www.semi.org.cn/site/semi/article/5205dbf61b7545228758d9ebe73c9>

[30d.html](#) [Top](#)

2	2
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2025-7-17

16

2

2028 2034 7

27

<https://www.cnstock.com/commonDetail/472286> [Top](#)

3

2025-7-17

AI

<https://www.stcn.com/article/detail/2621058.html> [Top](#)

4	10%	41%
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2025-8-1

7 31

10% 41%

41%

40%

10%

15%

20%

15%

15%

15%

35%

7 31

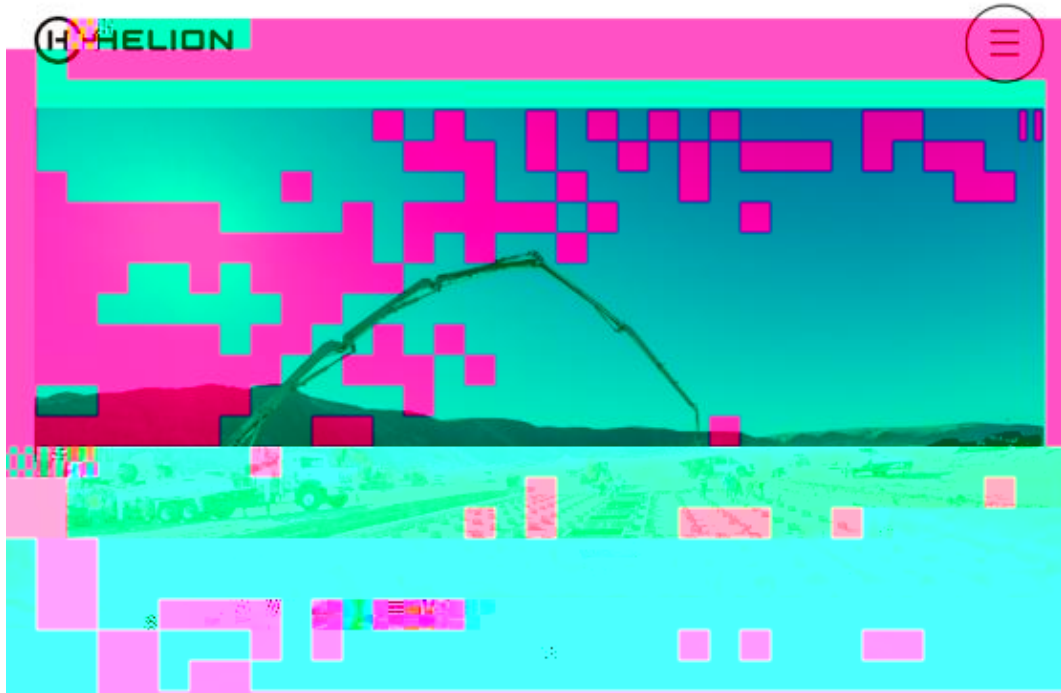
25%

35%

8 1

Orion

Helion



Helion

<https://caifuhao.eastmoney.com/news/20250801082749385469140> [\\_Top](#)

6

AI

2025-8-5

8 4

AI

AI

AI

AI

I&M

TVA

<https://www.cls.cn/detail/2105842> [Top](#)



1	AI
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2025-7-10

GaN

8-K



	4816	6.5%	88294
10.2%	155543	1.1%	
		10.3%	3.4%
7.5%		22.8%	
			4.6%
	21.8%	15.4%	4.2%
		0.8%	3.2%
4.8%	1.9%		
		2.8%	
4.8%		13.6%	

<https://www.cnstock.com/commonDetail/470930> Top

3	SEMI	2025	10%
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2025-7-30

	2025	7	29	SEMI	Silicon Manufacturers Group
(SMG)				2025	3327
	million square inches, MSI			2024	3035
9.6%				2896	14.9%
memory					
	SEMI SMG	GlobalWafers		AI	
		HBM			

300mm

<https://www.semi.org.cn/site/semi/article/6842f379a2fc48bc95a9bfbf8f17729>

[1.html](#) [Top](#)





KA+TOP

[https://bao.hvacr.cn/202507\\_2114093.html](https://bao.hvacr.cn/202507_2114093.html) [Top](#)

4

2025-7-07



29.51%

<https://36kr.com/p/3402851703396742> [Top](#)

7

7

2025-8-6

6

(688448.SH)

7

3.05

ORC

<https://www.cls.cn/detail/2107667> [Top](#)

8

2025-8-8

2025-8-7

Daikin Applied Americas Inc.

DAA

AI

Dynamic Data Centers Solutions

DDCS

DDCS

AI

AI

[https://bao.hvacr.cn/202508\\_2114505.html](https://bao.hvacr.cn/202508_2114505.html)

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10

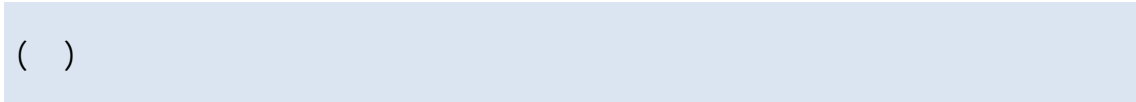
2025-8-12

2015

Koen Lauwers

LED FPD Solar

<https://mp.weixin.qq.com/s/ZD2Vp7m-5NL2mP1RAZa8pQ> [Top](#)



	1,488,837,616.11	1,834,933,350.11	-18.86%
	270,575,242.08	539,358,465.90	-49.83%
	270,630,180.43	538,885,510.34	-49.78%
	257,359,767.42	450,724,131.03	-42.90%
	247,987,208.19	424,911,867.66	-41.64%
	0.4813	0.8429	-42.90%
	5.99%	11.62%	-5.63%
	6,166,043,098.03	6,035,772,658.47	2.16%
	4,290,762,405.31	4,220,027,509.02	

1

2

3

4

5

6

	247,929,286.68	424,911,867.66	-41.65%
	407,410,943.80	386,969,159.44	5.28%
/	0.4813	0.8429	-



2025

HFCs

2025

12%

8%

5%-8%

[https://bao.hvacr.cn/202508\\_2114403.html](https://bao.hvacr.cn/202508_2114403.html) [Top](#)

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2025-8-4

功勋董秘获奖名单			
股票代码	公司名称	姓名	
300011	鼎汉技术	李彤	
002732	燕塘乳业	李春锋	
600547	山东黄金	汤琦	
600312	平高电气	刘湘章	
雷股份	周丽	300443	金
钟精机	邱玉英	002158	莎
齐眼药	张少奎	300573	兴
	002938	鹏鼎控股	周红
江苏神通	章其强	002438	

[https://mp.weixin.qq.com/s/smh38ZBea\\_bqJFDON2PfQw](https://mp.weixin.qq.com/s/smh38ZBea_bqJFDON2PfQw) [Top](#)

OpenAI

AI

AI

2025-8-16

OpenAI

Sam Altman

7

OpenAI

45

300

AI

Stargate 5000 OpenAI

AI

ChatGPT 5 G42 OpenAI Oracle

AI StargateUAE

2026 10 Nvidia

OpenAI AI

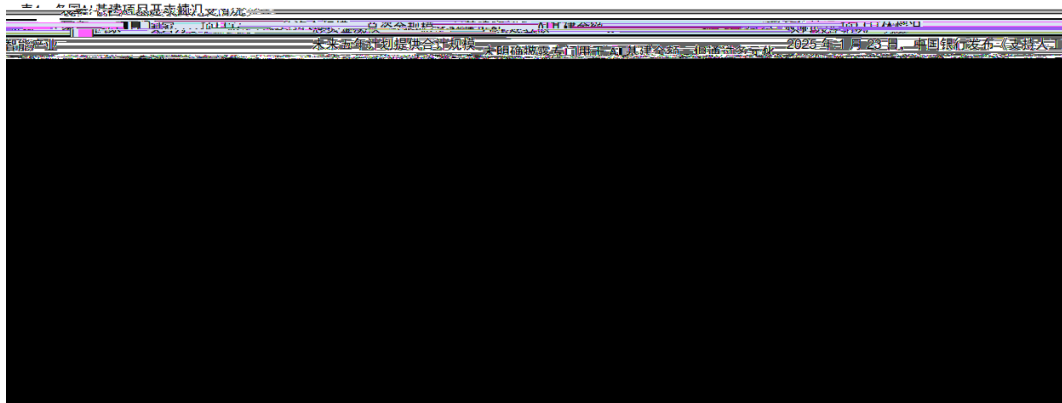
Stargate AI

Marvell AIDay CSP 2025 5950 2028

10220 CAGR 20% 2025

AI

1000 4 5000 2000 1090



Meta 2025 3200

2024 39% 2024

2025 1500 206.4

		2025	Q1	246	121%	
CEO		3800		AI	10	
	3000		2024	Q4	11% 366	386%
	114%	2025	Q1			

"

AI

AI

AI

<https://www.cls.cn/detail/2117155> [Top](#)

IPO

4600

2025-8-18

8 8

1680

3.5

2021 2024

3.44 4.02

4.80 2.68

39.87% 49.18% 50.85%

61.18%

13%

16.67%

2022 2024

1751.61

1836.89 1096.06

4684.56

	2021	2024
	4509.15	5056.47
	5530.60	3092.91
	13.12%	12.57%
	11.53%	11.53%
	5.56%	5.93%
	6.67%	4.32%

	2021	2024
	4.80	2.68
	3.44	4.02
	39.87%	49.18%
	50.85%	
	61.18%	
	1.94	2.45
	2.91	140

2022

SZ.002158

16.67%      2022   -2024

1751.61      1836.89      1096.06      4684.56

2014

2017

2022      2024

1598.98

1035.70

91.29%

94.49%



<https://caifuhao.eastmoney.com/news/20250818105850725718250> [Top](#)

10.01%

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2025-8-19

2025 8 19

23.85

2.17

441063

10.46

8 19

8 19

13826.91

43487.21

<https://finance.jrj.com.cn/2025/08/19192252540>

19.09

14.32%

8 15

46.43%

26.24

8 18 19

2024

10

5.8

2025

20%

<https://stock.jrj.com.cn/2025/08/20161952562978.shtml> [Top](#)

2025

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2025-8-24

2025

			3	3	
3.25%	39.55	38.05	2025	47%	
			3	2	1.12% 2025
35.96%	141.49				

2024	7868	6115.3	
663.1	1084.3 /		
	300257	300441	002158
301028	301187	301317	
	aircompressor		
		OEM	
ODM	OEM		
	OEM	ODM	OEM

2000

2011

1

3

42.36%

11.93% 11.65%

10%

2024

319.36

4.0%

2025

[ ]

<https://nmas.valueonline.cn/nmas/index?selectMenu=1&iPinId=264484433>

[Top](#)

8 27

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2025-8-27

8 27

2019

ESG

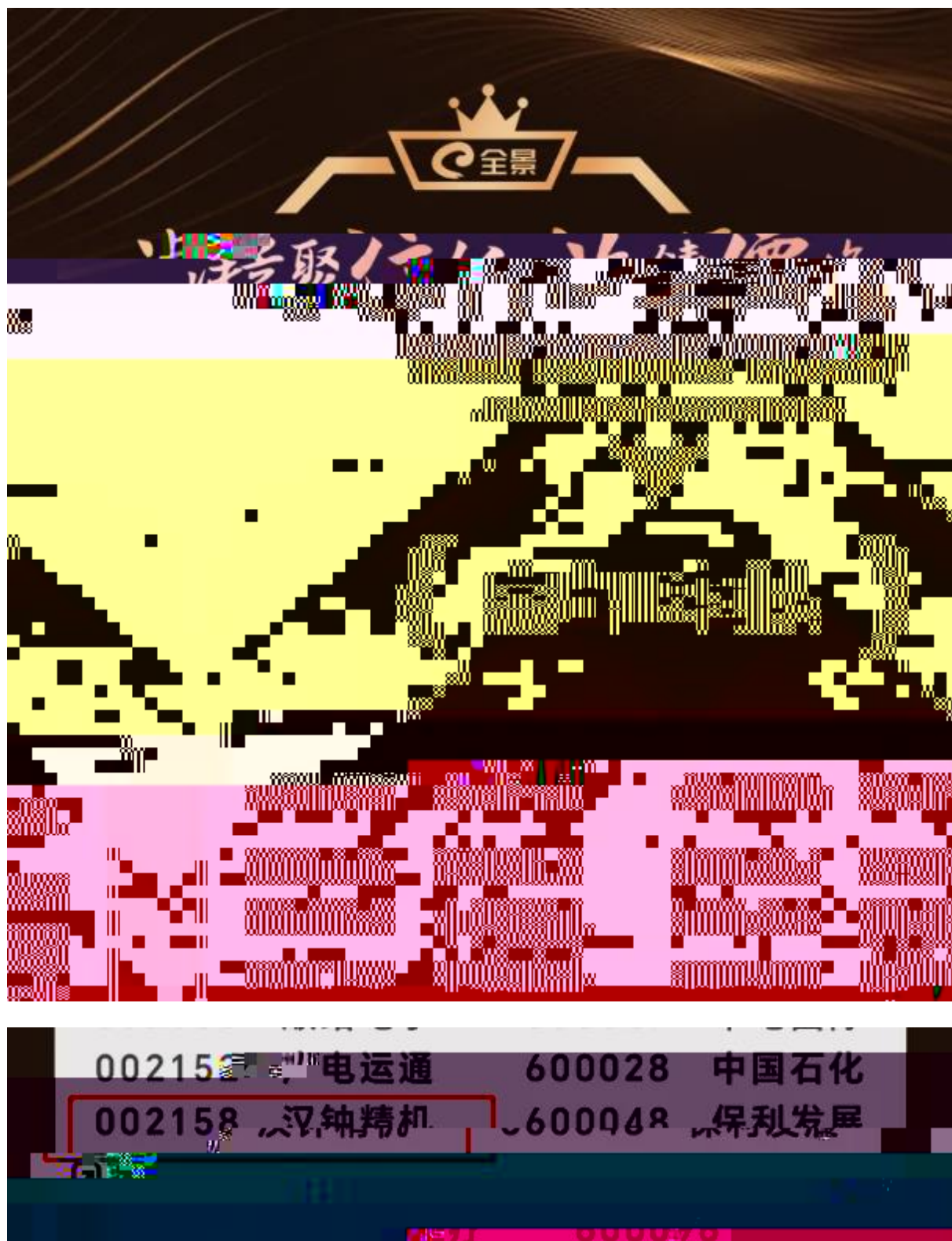
IR

IR

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<https://www.p5w.net/special/>

[202508/iraward/#ztabout](https://www.p5w.net/special/202508/iraward/#ztabout)



<https://mp.weixin.qq.com/s/hC5JFKhiJZxZTPqjHozW4w>

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(002158.SZ)

2.57

42.90%

2025-8-28

8 28 (002158.SZ) 2025

14.89 18.86% 2.57

42.90% 2.48

41.65% 0.4813

<https://www.gelonghui.com/news/5070339> [Top](#)

