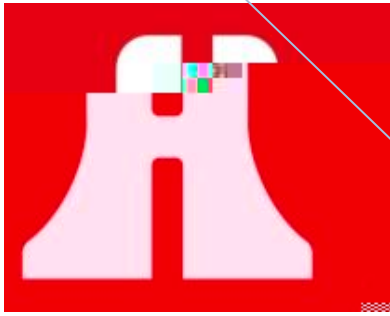




2025

4

100

002158

10

	 17
--	----------

()

()

	 39
--	----------



1	10	50
---	----	----

2025-7-7

50

EDA

10

5

50

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

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

2	2
---	---

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](#)

10% 41%

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
---	----

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%
---	------	------	-----

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 [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 [Top](#)

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 [Top](#)

|

2025-8-4

功勋董秘获奖名单			
序号	股票代码	公司名称	董秘姓名
1	300011	鼎汉技术	李彤
2	002732	燕塘乳业	李春
3	600547	山东黄金	汤瑞
4	600312	平高电气	刘琳
5	金雷股份	周丽	30044
6	汉钟精机	邱玉英	00215
7	兴齐眼药	张少强	30057
8	周红	002938	鹏鼎控股
9	002438	江苏神通	章其强

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

OpenAI AI AI

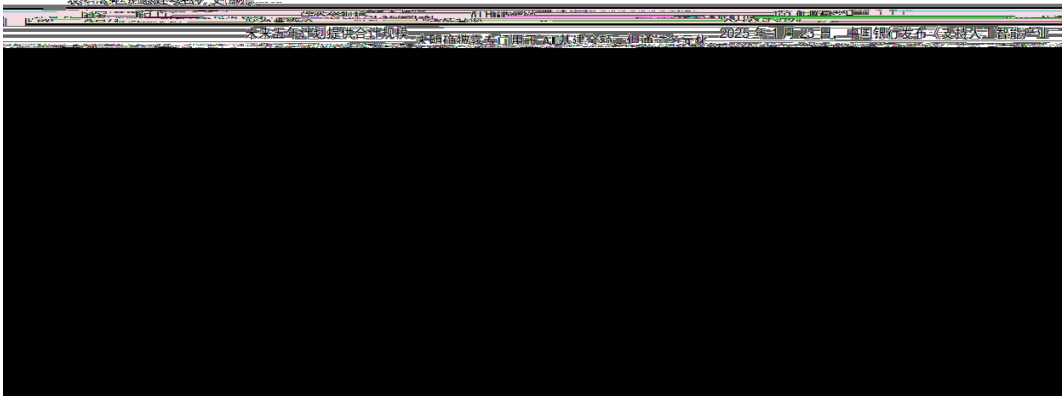
2025-8-16

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	AI Day		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
	114%	2025	Q1		386%

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

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%

4680

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

10.01%

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

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		
		OBM	
ODM	OEM		
	OEM	ODM	OBM

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

2025-8-27

8 27

2019

ESG

IR

IR

IR

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

202508/iraward/#ztabout



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

[Top](#)

(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](#)

