

# 一周股市動向

2021年01月25日

## 恒指走勢展望

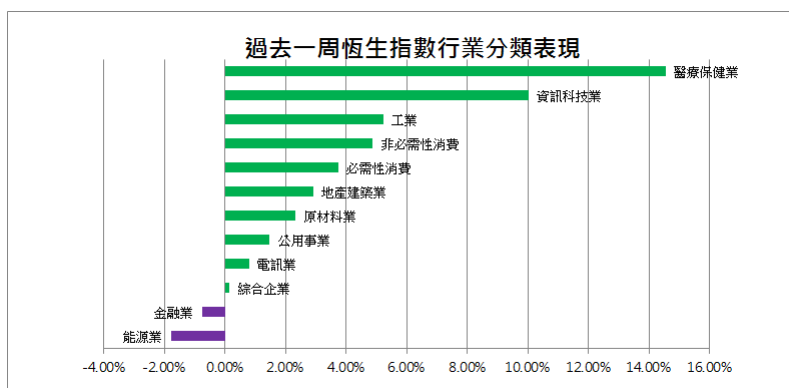


資料來源：彭博

美股上周五三大指數個別發展，科技股跑贏。市場憧憬美國新任總統拜登揚言推出新一輪總值 1.9 萬億美元的大規模的紓困方案，關注國會能否迅速達成共識。另外，全球新冠肺炎疫情持續，令部份投資者的憂慮重燃。全周累計，道指升 182 點，收報 30,996 點；標普 500 指數升 73 點，報 3,841 點；納指升 544 點，報 13,543 點。留意下周美股進入業績期，美國聯儲局將於周二至周三議息，市場預料會維持利率及買債計劃不變。

港股全周則累計升 873 點，報 29,447 點。恒指自去年底突破以來已累升近 3,000 點，短線挑戰 30,000 點的關點或目爭持，若果需整固升幅，首個支持位為月中的上升裂口，約 28,864 點至 29,100 點。重磅新股快手科技或於下周起招股，或抽走市場部份資金。

## 行業板塊動態



資料來源：恒生指數有限公司

- 中國國家統計局數據顯示，2020 年全國網上零售額達人民幣 11.76 萬億元，按年增長 10.9%，實物商品網上零售額達人民幣 9.76 萬億元，按年增長 14.8%，佔社會消費品零售總額的比重接近四分之一。
- 人民銀行公布，商業銀行去年底結構性存款餘額進一步降至約人民幣 6.44 萬億元，按月減少人民幣 1.02 萬億元，按年減少人民幣 3.16 萬億元，基本達成此前監管要求的全年壓降三分之二的目標。

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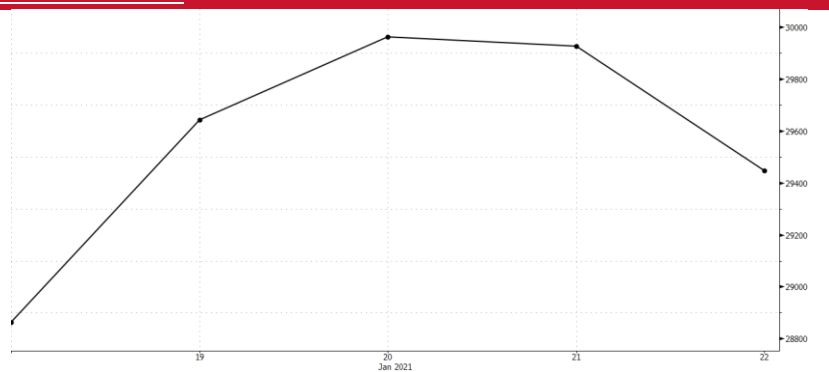
**主板半新股表現**

代號	名稱	上市日期	貨幣	上市價	公開認購倍數	首日開市價	上周收市價	累積升跌
02159	麥迪衛康	19/01/2021	HKD	3.00	168.8x	4.00	4.11	+37.00%
09608	宋都服務	18/01/2021	HKD	0.25	25.24x	0.23	0.144	-42.40%
02146	榮萬家	15/01/2021	HKD	13.46	6.62x	12.80	11.90	-11.59%
02125	稻草熊娛樂	15/01/2021	HKD	5.88	403.5x	7.00	7.40	+25.85%
01490	CHESHI	15/01/2021	HKD	1.23	1275x	1.70	1.36	+10.57%
02158	醫渡科技	15/01/2021	HKD	26.30	1634x	58.25	62.00	+135.74%

資料來源：etnet

**環球指數**

	上交易日收市	一星期變化	百分率	四星期變化	百分率
<b>香港</b>					
恒生指數	29,447.85	+873.99	+3.06%	+3061.29	+11.60%
國企指數	11,677.45	+356.92	+3.15%	+1246.92	+11.95%
<b>中國內地</b>					
上證綜合指數	3,606.75	+40.37	+1.13%	+243.64	+7.24%
深圳成份指數	15,628.73	+597.03	+3.97%	+1713.16	+12.31%
滬深 300 指數	5,569.78	+111.70	+2.05%	+569.76	+11.40%
<b>美國</b>					
美國道瓊斯指數	30,996.98	+182.72	+0.59%	+797.11	+2.64%
標準普爾 500 指數	3,841.47	+73.22	+1.94%	+138.41	+3.74%
美國納斯達克指數	13,543.06	+544.56	+4.19%	+738.33	+5.77%
<b>歐洲</b>					
倫敦富時 100 指數	6,695.07	-40.64	-0.60%	+192.96	+2.97%
法蘭克福 DAX 指數	13,873.97	+86.24	+0.63%	+286.74	+2.11%
巴黎 CAC 指數	5,559.57	-52.12	-0.93%	+37.56	+0.68%

**一周恒指走勢**


資料來源：彭博

**恒生指數:**

市盈率(倍) 15.15

周息率(%) 2.67

**國企指數:**

市盈率(倍) 11.69

周息率(%) 2.65

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