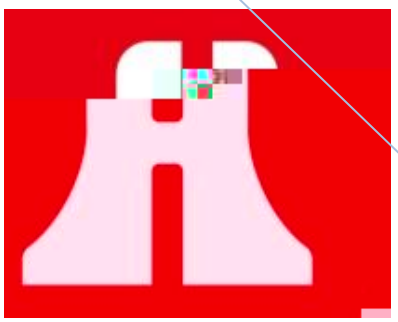

2025 4 100

002158

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.....39

1 10 50

2025-7-7

50

EDA

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5 50

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2 2

2025-7-17

16 2

2028 2034 7

27

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3

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AI

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4 10% 41%

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

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6	AI

2025-8-5

8 4

AI

AI

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%

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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

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4

2025-7-07

1998 9

29.51%

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7	7

2025-8-6

6 (688448.SH)

7 3.05

ORC

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2025-8-7

Daikin Applied Americas Inc.

DAA AI

Dynamic Data Centers Solutions

DDCS DDCS AI

AI

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10

2025-8-12

2015

Koen Lauwers

LED FPD Solar

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	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	

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	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%

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2025-8-4

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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

11%
3000 2024 Q4 366 386%

114% 2025 Q1

“

AI AI

AI

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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 3.44 4.02

4.80 2.68 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%

4680

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10.01%

2025-8-19

2025 8 19 23.85 2.17

441063 10.46

8 19

8 19 13826.91 43487.21

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19.09 14.32%

8 15

46.43% 26.24 8 18 19

2024 10 5.8

2025

20%

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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

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8 27

2025-8-27

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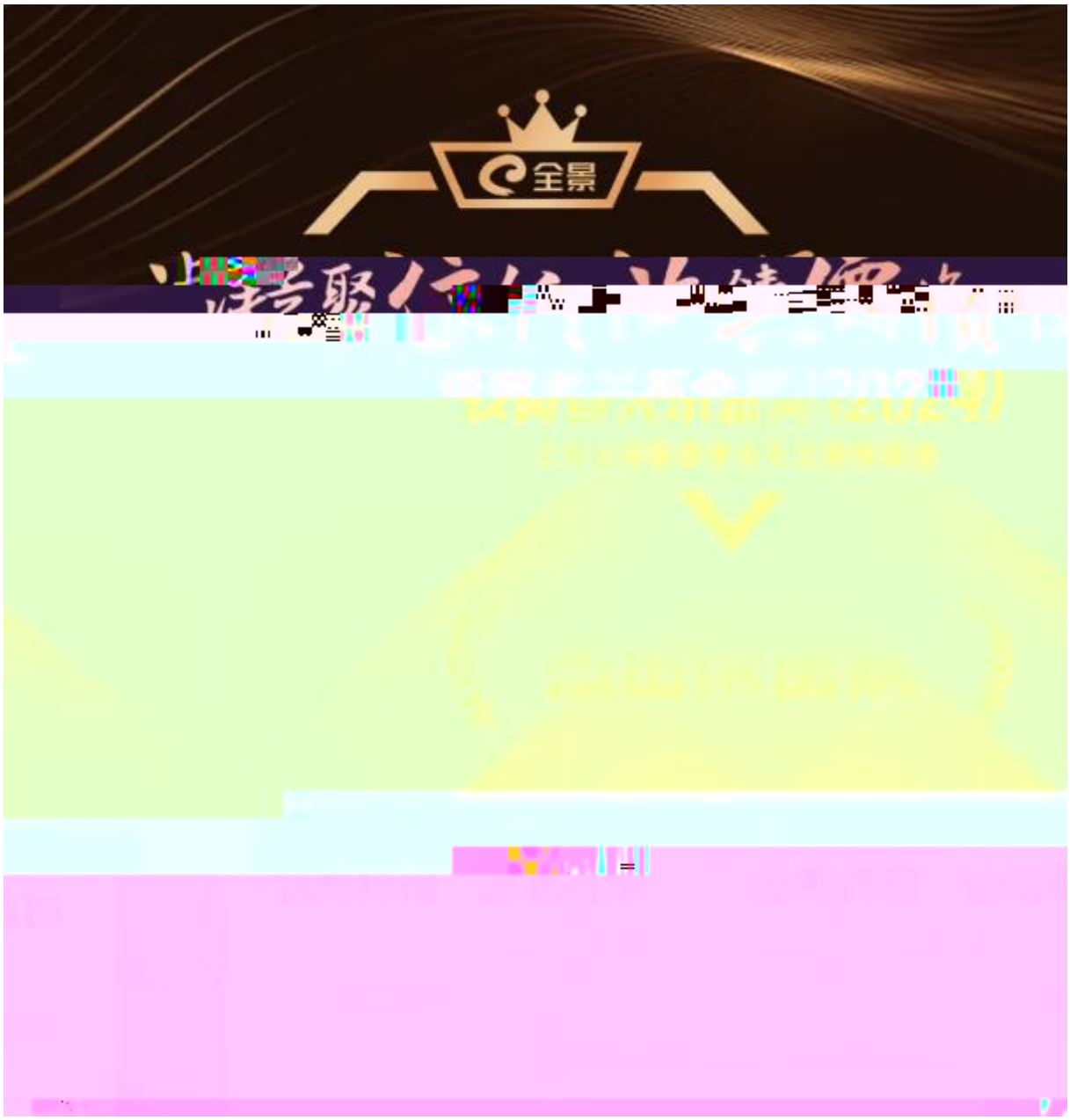

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(002158.SZ) 2.57 42.90%

2025-8-28

8 28 (002158.SZ) 2025

14.89 18.86% 2.57

42.90% 2.48

41.65% 0.4813

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