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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  |
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|  | **兴业银行添利5号净值型理财产品 2020年年度报告** | | | | | | | | | | | | | | | | |  |
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|  |  | | | | | | 理财产品管理人：兴银理财有限责任公司 | | | | | | | |  | | |  |
|  |  | | | | | | 理财产品托管人：兴业银行股份有限公司 | | | | | | | |  | | |  |
|  |  | | | | | | 报告送出日期：2021年5月14日 | | | | | | | |  | | |  |
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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  |
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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  |
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|  | **§ 一. 重要提示** | | | | | | | | | | | | | | | | |  |
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|  | 1. 温馨提醒：理财非存款，产品有风险，投资需谨慎！  2. 理财信息可供参考，详情请咨询理财经理，或在“中国理财网（www.chinawealth.com.cn）”查询该产品相关信息。  3. 兴银理财有限责任公司保留对所有文字说明的最终解释权。  4. 投资组合情况（期末资产组合情况、杠杆比例、资产前十持仓等）详情请理财持有人登录网银后进行查询。 | | | | | | | | | | | | | | | | |  |
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|  | **§ 二. 产品基本情况** | | | | | | | | | | | | | | | | |  |
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|  | 产品名称 | | | | | | | | 兴业银行添利5号净值型理财产品 | | | | | | | | |  |
|  | 产品代码 | | | | | | | | 9B319021 | | | | | | | | |  |
|  | 全国银行业理财信息登记系统登记编码 | | | | | | | | Z7002020000004 | | | | | | | | |  |
|  | 产品运作方式 | | | | | | | | 开放式 | | | | | | | | |  |
|  | 产品募集方式 | | | | | | | | 公募 | | | | | | | | |  |
|  | 报告期末产品份额总额 | | | | | | | | 20,660,043,412.74份 | | | | | | | | |  |
|  | 业绩比较基准 | | | | | | | | 通知存款七天+浮动基数0% | | | | | | | | |  |
|  | 投资币种 | | | | | | | | 人民币 | | | | | | | | |  |
|  | 风险等级 | | | | | | | | R1 | | | | | | | | |  |
|  | 产品管理人 | | | | | | | | 兴银理财有限责任公司 | | | | | | | | |  |
|  | 产品托管人 | | | | | | | | 兴业银行股份有限公司 | | | | | | | | |  |
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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  |
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|  | **§ 三. 产品收益表现** | | | | | | | | | | | | | | | | |  |
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|  | 报告期内，本产品9B319021七日年化收益率均值2.8093%。同期业绩比较基准如下： | | | | | | | | | | | | | | | | |  |
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|  | |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | | **产品代码** |  | | |  | | --- | | **适用期间** | | |  | | --- | | **业绩比较基准** | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 2020-01-01至2020-12-31 | | |  | | --- | | 通知存款七天+浮动基数0% | | | | | | | | | | | | | | | | | |  |  |
|  | 报告期末，产品收益具体如下： | | | | | | | | | | | | | | | |  |  |
|  | **估值日期** | | | | | **万份收益** | | | | | **七日年化收益率** | | | **产品资产净值** | | |  |  |
|  | 2020年12月31日 | | | | | 0.9131 | | | | | 3.6610% | | | 20,660,043,412.74 | | |  |  |
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|  | **§ 四. 产品投资经理简介** | | | | | | | | | | | | | | | | |  |
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|  | 汪锦女士，上海财经大学经济学硕士，国际金融理财师（CFP），中级经济师职称。银行理财产品创设、投资从业11年。 2005年历任上海银行金融市场部代客资产管理处固定收益投资经理、任同业“利多系列”产品经理；2013年加入兴业银行资产管理部产品研发处，任同业“稳增1号”、“稳增2号”产品的投资经理。2016年起，负责总行资产管理部流动性管理，总规模逾万亿，擅长大资金的资产配置和流动性管理，尤其善于管理同业理财产品。2019年5月起担任“兴业银行添利五号净值型理财产品”投资经理。 | | | | | | | | | | | | | | | | |  |
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|  | **§ 五. 报告期内产品的投资策略和运作分析** | | | | | | | | | | | | | | | | |  |
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|  | 1、宏观经济及市场情况  习主席说：“2020年极不平凡。”这句话同样适用在今年的债券市场上，用一波三折来概况今年的行情一点也不为过。在新冠疫情和经济修复的主线逻辑下，债市一年内经历深V走势，10年期国债利率在2020年末又神奇地回到了2019年末3.14%的位置。债市行情概括为如下几个阶段：  第一阶段为年初至4月下旬的牛市。新冠疫情爆发引致经济停滞担忧、全球范围内货币政策大放水。国内央行降息降准，利率快速下行，10年期国债收益率累计下行66bp（从3.14%至2.48%），突破了上一轮牛市的低点。  第二阶段为4月底至7月的快熊。疫情得到控制后，复工复产推进，经济实现深“V”修复。以货币政策回归常态化为触发，债市快速转熊，利率上行并且一度突破达到疫情前水平，10年期国债收益率累计上行42bp（从2.48%到2.86%）。  第三阶段为8月至12月中的震荡偏熊格局。债市由暴跌向阴跌切换，空头思维形成，但市场没有明确逻辑主线，10年期国债收益率震荡上行43bp（从2.86%到3.29%，截至2020.12.18）。  第四阶段为12月中至年末的震荡偏牛格局。随着12月18日中央经济工作会议定调宏观政策不急转弯开始，央行加大货币市场投放力度，天量MLF、OMO投放，使得市场对前期中性偏紧的货币政策有中性偏宽松预期，有机构已经开始启动明年1季度的抢跑行情。10年期国债收益率震荡下行15bp（从3.29%到3.14%）。  2、前期运作回顾  报告期内（2020.1.1-2020.12.31），产品规模经历了大幅波动，年中高点达到470亿，年末规模207亿基本回 | | | | | | | | | | | | | | | | |  |
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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  | |  |
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|  | 到19年末的水平。特别是临近12月，因同业客户监管指标、流动性、特殊时点等综合因素影响，添利5号规模出现大规模赎回。四季度月日均324亿元，较三季度日均减少14.7%。由于规模下降较快，产品正回购比例迅速走高，截止年末时点，杠杆比例为152.3%。从七日年化收益率看，本产品收益区间维持在2.38%至3.66%之间，全年平均2.81%。  资产端方面，上半年市场流动性极度宽松，以高评级、短久期的债券为主，结合对应期限杠杆增厚产品收益；下半年起考虑到产品在年末可能流动性紧张，故资产构建提前抢跑，特别是在永煤事件爆发以后，果断加大一级高评级债券的投标力度，增加1年期存放同业、1-3年利率债、同业存单和高收益债券。截止当前，这些资产都获得了不错的浮盈，提高了整个组合的收益。同时，在12月为缓解产品流动性，主动卖出静态较低的资产，为明年腾空间。  3、后期投资策略  展望一季度， 市场一致认为2021年全年GDP将呈现前高后低，社融增速在今年11月已达到高点，未来将冲高回落。需警惕信用扩张放缓带来的信用事件发生。此外，今年超预期的进出口数据，在明年全球疫情逐渐得到控制后，对国内经济增长的贡献将逐渐走弱，消费、制造业投资、将成为经济复苏的主力。而宏观经济政策“不急转弯”，不急是短期，转弯是中期，预示着后期经济增长的力度和长度都将趋缓。从货币政策来看，从12月开始央行大量公开市场的货币投放，1年期国股存单从3.3%左右的位置迅速下到2.9%-3%，DR001很长时间维持在1%以下，市场流动性虽不可能回到2020年4月极最宽松的时点，但年末的宽松也可以传达了央行近期维稳的态度。因此，债市收益率将回归到类似2019年上有顶、下有底的状态。  在这种背景下，流动性管理至关重要，既要保证产品能在流动性宽松的时候接受客户申购保证收益；又要抗住波动时产品赎回带来的被动斩仓是的损益。总的来说，在当前的宏观周期阶段，交易性机会大于趋势性机会。站在当下，10年期国债收益率又回到2019年末位置附近，利率债重回波动区间偏下的水平，中期仍存在不确定性。信用债收益率处于分化中，规避弱国企、弱城投，提防低评级债券信用利差走阔带来的估值风险。依然看好短久期、好资质的私募品种的债券。  总之，我们将深入研究分析宏观经济运行规律和利率变化趋势，综合考量各投资品种的风险收益特征，在此基础上自上而下地制定科学有效的投资策略。 | | | | | | | | | | | | | | | | |  | |  |
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|  | **§ 六. 理财托管机构报告** | | | | | | | | | | | | | | | | |  | |  |
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|  |  | 报告期内，托管人严格遵守《商业银行理财业务监督管理办法》及相关法律法规规定、理财产品托管协议约定，诚实信用、谨慎勤勉地履行了托管人义务，不存在损害理财产品投资者利益的行为。  报告期内，托管人根据国家有关法律法规规定、理财产品托管协议的约定，对管理人在本理财产品的投资运作、资产净值的计算、收益的计算、理财产品费用开支等方面进行了必要的监督、复核和审查，未发现其存在任何损害本理财产品投资者利益的行为。  托管人认真复核了本报告中的净值表现、投资组合报告等内容，认为其真实、准确和完整，不存在虚假记载、误导性陈述或者重大遗漏。 | | | | | | | | | | | | | | | | | |  |
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|  | **§ 七. 审计报告** | | | | | | | | | | | | | | | | |  | |  |
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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  | |  |
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|  | 本产品聘请毕马威会计师事务所（特殊普通合伙）上海分所依据中国注册会计师审计准则对本产品的财务报表，包括2020年12月31日的资产负债表，2020年度的利润表和理财产品净值变动表以及相关财务报表附注进行了审计，并出具了审计报告。 | | | | | | | | | | | | | | | | |  | |  |
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|  | **§ 八. 投资组合情况** | | | | | | | | | | | | | | | | |  | |  |
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|  |  | **1.报告期末产品资产组合情况** | | | | | | | | | | | | | | | | | |  |
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|  |  | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  | | --- | | **序号** | | |  | | --- | | **资产类型** | | |  | | --- | | **直接投资占比（%）** | | |  | | --- | | **间接投资占比（%）** | | | |  | | --- | | 1 | | |  | | --- | | 现金及存款 | | |  | | --- | | 16.16 | | |  | | --- | | -- | | | |  | | --- | | 2 | | |  | | --- | | 债券投资 | | |  | | --- | | 83.84 | | |  | | --- | | -- | | | |  | | --- | |  | | |  | | --- | | 总计 | | |  | | --- | | 100.00 | | |  | | --- | | -- | | | | | | | | | | | | | | | | | | | |  |
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|  | **2.报告期末杠杆融资情况** | | | | | | | | | | | | | | | | |  | |  |
|  | 添利5号产品年末连续遭遇大额净赎回，为满足客户的流动性安排，产品未启动暂停赎回，导致12月末产品杠杆比例被动超过了140%。我司将在年初第十个工作日将产品杠杆率调整回140%以内。特此说明。 | | | | | | | | | | | | | | | | |  | |  |
|  | **3.投资组合的流动性风险分析** | | | | | | | | | | | | | | | | |  | |  |
|  | 流动性风险是指产品在履行与金融负债有关的义务时遇到资金短缺的风险。本产品的流动性风险一方面来自理财份额持有人可在约定的开放日提出赎回其持有的理财份额，另一方面来自于若投资品种所处的交易市场不活跃，可能带来资产变现困难或产品持仓资产在市场出现剧烈波动的情况下难以以合理价格变现的风险。  为防范无法支付赎回款而产生的流动性风险，本理财产品管理人将合理安排所投资产期限，持续根据市场变化情况做好投资安排，尽可能降低产品流动性风险，有效保障理财持有人利益。  报告期内，本理财产品管理人严格遵守相关法律法规以及产品销售协议，对理财产品组合资产的流动性风险进行管理，报告期内未发生流动性风险。 | | | | | | | | | | | | | | | | |  | |  |
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|  | **4.报告期末资产持仓前十基本信息** | | | | | | | | | | | | | | | | |  | |  |
|  | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  | | --- | | **序号** | | |  | | --- | | **资产名称** | | |  | | --- | | **资产面额** | | |  | | --- | | **占产品资产净值的比例（%）** | | | |  | | --- | | 1 | | |  | | --- | | Z存放同业20201028001（不可转让） | | |  | | --- | | 2,000,000,000.00 | | |  | | --- | | 9.68 | | | |  | | --- | | 2 | | |  | | --- | | 建设银行（深圳分行）活期存款 | | |  | | --- | | 700,000,000.00 | | |  | | --- | | 3.39 | | | |  | | --- | | 3 | | |  | | --- | | 20CSFD40-03 | | |  | | --- | | 500,000,000.00 | | |  | | --- | | 2.42 | | | | | | | | | | | | | | | | | | |  | |  |
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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  |
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|  | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  | | --- | | 4 | | |  | | --- | | 存放同业20200826001 | | |  | | --- | | 500,000,000.00 | | |  | | --- | | 2.42 | | | |  | | --- | | 5 | | |  | | --- | | 存放同业20200220001 | | |  | | --- | | 500,000,000.00 | | |  | | --- | | 2.42 | | | |  | | --- | | 6 | | |  | | --- | | 20农业银行CD093 | | |  | | --- | | 500,000,000.00 | | |  | | --- | | 2.41 | | | |  | | --- | | 7 | | |  | | --- | | 20进出12 | | |  | | --- | | 310,000,000.00 | | |  | | --- | | 1.49 | | | |  | | --- | | 8 | | |  | | --- | | 18广发02 | | |  | | --- | | 300,000,000.00 | | |  | | --- | | 1.46 | | | |  | | --- | | 9 | | |  | | --- | | 同业借款20190125002 | | |  | | --- | | 300,000,000.00 | | |  | | --- | | 1.45 | | | |  | | --- | | 10 | | |  | | --- | | 20浦发银行CD384 | | |  | | --- | | 300,000,000.00 | | |  | | --- | | 1.44 | | | | | | | | | | | | | | | | | | |  |
|  |  | | | |  | | |  | | |  | |  | | | | |  |
|  | **5.报告期间关联交易情况** | | | | | | | | | | | | | | | | |  |
|  |  | | | | 5.1 理财产品在报告期末投资关联方发行、承销的证券的情况 | | | | | | | | | | | | |  |
|  | |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | | **产品代码** |  | | |  | | --- | | **资产名称** | | |  | | --- | | **资产面额（元）** | | |  | | --- | | **承销商/发行人** | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18恒信租赁PPN003 | | |  | | --- | | 80,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 19联发PPN003 | | |  | | --- | | 10,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18万科MTN001 | | |  | | --- | | 50,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18中广核租MTN001 | | |  | | --- | | 10,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18福清国资MTN001 | | |  | | --- | | 60,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18川交投MTN002 | | |  | | --- | | 30,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 20中交城投MTN001 | | |  | | --- | | 50,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 20津融投资SCP003 | | |  | | --- | | 10,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 20汉江国资SCP004 | | |  | | --- | | 60,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18芜湖建投PPN001 | | |  | | --- | | 20,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18首钢MTN002 | | |  | | --- | | 40,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 19金川MTN001 | | |  | | --- | | 20,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18兴业租赁债03 | | |  | | --- | | 100,000,000.00 | | |  | | --- | | 兴业金融租赁有限责任公司、兴业银行股份有限公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 20杭金投SCP005 | | |  | | --- | | 50,000,000.00 | | |  | | --- | | 兴业银行股份有限公司 | | | | | | | | | | | | | | | | | | |  |
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|  | 兴业银行添利5号净值型理财产品2020年年度报告 | | | | | | | | | | | | | | | | |  | | | |  |
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|  |  | |  | |  | | |  | | |  | |  | | | | |  | | | |  |
|  |  | |  | | 5.2 理财产品在报告期内其他关联交易 | | | | | | | | | | | | |  | | | |  |
|  | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | | **产品代码** |  | | |  | | --- | | **资产名称** | | |  | | --- | | **资产面额（元）** | | |  | | --- | | **交易类型** | | |  | | --- | | **关联方名称** | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18兴业租赁债03 | | |  | | --- | | 100,000,000.00 | | |  | | --- | | 买入 | | |  | | --- | | 兴业金融租赁有限责任公司 | | | |  |  | | --- | --- | | 9B319021 |  | | |  | | --- | | 18兴业租赁债01 | | |  | | --- | | 30,000,000.00 | | |  | | --- | | 买入 | | |  | | --- | | 兴业金融租赁有限责任公司 | | | | | | | | | | | | | | | | | | |  | | | |  |
|  |  | |  | |  | | |  | | |  | |  | | | | |  | | | |  |
|  |  | |  | | 5.3 理财产品在报告期内中的重大关联交易 | | | | | | | | | | | | |  | | | |  |
|  | |  |  |  |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | | |  |  | | --- | --- | | **产品代码** |  | | |  | | --- | | **资产名称** | | |  | | --- | | **资产面额（元）** | | |  | | --- | | **交易类型** | | |  | | --- | | **关联方名称** | | | | | | | | | | | | | | | | | | |  | | | |  |
|  | |  |  |  | | --- | --- | --- | | |  |  | | --- | --- | | 无 |  | | | | | | | | | | | | | | | | | | |  | | | |  |
|  |  | |  | |  | | |  | | |  | |  | | | | |  | | | |  |
|  |  | | **6.投资账户信息** | | | | | | | | | | | | | | | | | | |  |
|  |  | | |  |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | --- | | |  | | --- | | **序号** | | |  | | --- | | **账户类型** | | |  | | --- | | **账户编号** | | |  | | --- | | **账户名称** | | | |  | | --- | | 1 | | |  | | --- | | 托管账户 | | |  | | --- | | 051010100100810699 | | |  | | --- | | 兴业理财托管专户添利5号净值型理财产品 | | | | | | | | | | | | | | | | | | | | |  |
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|  | 兴银理财有限责任公司 | | | | | | | | | | | | | | | | |  | | | |  |
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