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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |
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|  | **兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告** |  |
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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：2022年9月21日 |  |  |
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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |
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|  |  |  |  | **目 录** |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  | § 一. 重要提示§ 二. 产品基本信息§ 三. 产品收益表现§ 四. 产品投资经理简介§ 五. 报告期内产品投资策略§ 六. 理财托管机构报告§ 七. 投资组合情况 1. 报告期末资产组合情况 2. 报告期末杠杆融资情况 3. 投资组合的流动性风险分析 4. 报告期末资产持仓前十基本信息 5. 报告期间关联交易情况 6. 投资账户信息 |  |  |
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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |
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|  | **§ 一. 重要提示** |  |
|  |  |  |  |  |  |  |
|  |  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** |  |
|  |  |  |  |  |  |  |
|  | 产品名称 | 兴银理财兴承恒享开放式1号净值型理财产品 |  |
|  | 产品代码 | 9D210010 |  |
|  | 全国银行业理财信息登记系统登记编码 | Z7002021000092 |  |
|  | 产品运作方式 | 开放式 |  |
|  | 产品募集方式 | 公募 |  |
|  | 投资类型 | 混合类 |  |
|  | 报告期末产品份额总额 | 3,128,555,527.14份 |  |
|  | 业绩比较基准/业绩报酬计提基准 | --/6.00% |  |
|  | 投资币种 | 人民币 |  |
|  | 风险等级 | R3 |  |
|  | 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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| 下属子份额的销售名称 |  |

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|  |
| --- |
| 下属子份额的销售代码 |

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| --- |
| 报告期末下属子份额的产品份额总数 |

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|

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| --- |
| 兴银兴承恒享1号开放式A |

 |

|  |
| --- |
| 9D21001A |

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|  |
| --- |
| 1,492,254,591.20 |

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|

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| --- |
| 兴银兴承恒享1号开放式B |

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|  |
| --- |
| 9D21001B |

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| 1,636,300,935.94 |

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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |  |
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|  | **§ 三. 产品收益表现** |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  | 产品9D21001A自成立日以来，累计净值增长率为0.6250%，年化累计净值增长率为0.5497%。产品9D21001B自成立日以来，累计净值增长率为0.8450%，年化累计净值增长率为0.7432%。报告期末，产品净值表现具体如下： |  |  |  |
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| 产品代码 |  |

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| 估值日期 |

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|  |
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| 产品份额净值 |

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|  |
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| 产品累计净值 |

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| 产品资产净值 |

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|  |  |
| --- | --- |
| 9D210010 |  |

 |

|  |
| --- |
| 2022年6月30日 |

 |

|  |
| --- |
| 1.00740 |

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| --- |
| 1.00740 |

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| --- |
| 3,151,706,192.91 |

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| 销售代码 |  |

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| 估值日期 |

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| 产品份额净值 |

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| 产品累计净值 |

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| 产品资产净值 |

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| 9D21001A |  |

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| --- |
| 2022年6月30日 |

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|  |
| --- |
| 1.00625 |

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| 1.00625 |

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| 1,501,576,335.60 |

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| 9D21001B |  |

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| 2022年6月30日 |

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| 1.00845 |

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| 1.00845 |

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| 1,650,129,857.31 |

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|  | **§ 四. 产品投资经理简介** |  |  |
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|  |  吕雯丽女士，复旦大学财务管理学士、金融硕士，5年债券投资研究经验，曾任华安基金管理有限公司信用研究员，于2019年加入兴业银行资管，现任兴银理财债券投资经理，主要负责纯债和股债混合产品投资管理工作。追求持续稳定回报，在保证流动性和安全性的前提下，兼顾收益性，擅长通过基本面研究、信用研究和主动管理获取超额收益。 吕承应女士，北京大学统计学学士、经济学双学士，北京大学经济学硕士、新加坡国立大学金融工程硕士，2017年加入兴业银行，具有5年FOF/MOM投资研究经验。 |  |  |
|  |  |  |  |  |  |  |  |  |
|  | **§ 五. 报告期内产品的投资策略和运作分析** |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  一、2022年上半年投资策略与运作回顾 固收方面，2022年上半年，长端利率整体震荡，短券表现较好，曲线趋于陡峭，10年国债、3年AAA、1年AAA利率较上年末分别上行5bp、上行4bp和下行33bp，各等级和期限信用利差收窄为主。节奏来看，1月中旬央行宣布降息，货币宽松政策进一步落地，带动长端利率在春节前逐步走低，进入2月，部分地区地产政策出现松动，债市发酵宽信用+春季复苏预期，3月国内股市下跌造成理财固收+产品被赎回，加剧市场调整，10年国债利率上行20-30bp至2.85%左右。3月末至5月中下旬，经济恢复过程被局部疫情推后，货币政策保持宽松，信贷需求不足，债市出现一轮资产荒，期间流动性宽裕的现实与对宽货币预期的谨慎，使得债市收益率曲线趋于陡峭化，10年国债收益率在2.7%-2.85%区间窄幅震荡，1年期存单利率从2.6%趋势下行，一度降至2.25%附近。6月随着上海等地解封，市场逐步交易复苏行情，但资金面仍宽松，长端利率盘整上行。 产品运作方面，考虑到偏松的货币政策、较弱的经济基本面预期、多地散发的疫情等因素，上半年整体以震荡偏强的市场运作思路来调整组合久期和杠杆等。一季度考虑到降息兑现后利率下行的空间整体有限，产品整体稳健操作，组合久期整体有所下降，二季度随着上海疫情影响加剧，组合适当提高久期。在券种具体操作方面，主要跟 |  |  |
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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |  |
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|  | 踪利差的变动，进行积极调仓，在信用利差显著走扩的情况下，增持了3年内信用债、有所超跌的3-5年大行二级资本债。 权益方面，2022年整体是宏观因素多且复杂的一年。宏观方面，国内地产数据持续不振，宏观经济下行压力较大，海外流动性收缩，资源品价格居高不下，通胀压力不断增大；A股市场，近两年赛道基金发行多，赛道估值较高。诸多因素导致A股阶段性熊市特征明显。之后亦受地缘事件、疫情反复影响，A股4月进入急跌状态。至4月末政策释放利好，市场企稳，进入反弹，至今偏成长行业反弹较多，出现轮动震荡特征。 二、下半年投资策略 固收方面，6月末以来，长端利率出现较快上行，主要是由于疫情影响消退，市场围绕疫后经济复苏开展交易，财政政策加码亦受到关注。考虑到前期政策靠前发力，复工加速，经济从底部回升，短期内修复斜率可能会比较高，外围仍处于加息环境中，内外因素对债市都偏空，另外市场关注资金面向中性收敛的压力，以上均压制长端利率的表现。市场短期仍面临调整的压力。 不过我们认为债市整体调整幅度不会太大，经济的持续性修复取决于疫情和地产的发展，还依赖居民收入预期和杠杆行为、财政政策的增量措施、线下消费场景的恢复等，考虑到地产周期和信用周期弹性减弱，债务杠杆可能提升缓慢，货币政策可能偏宽松的资金面，债市调整幅度有限。若财政政策不超预期加码，收益率调整可能是机会，尤其是期限利差压缩的机会。 利率估值方面，当前绝对水平并不高，考虑到利率中枢下降，有其合理性。各投资机构的久期位于中位数，显示投资者情绪并不极端。基于上述对后市的判断，产品将继续保持稳健的投资风格。1、发挥票息策略优势，维持中性偏低的杠杆水平与中性偏低的组合久期。2、震荡思路对待，把握住利率反弹时的配置机会。3、关注收益率曲线平坦化的可能。4、关注“稳增长”政策加码、通胀对债市的风险。 权益方面，展望后期，随着市场从底部反弹，市场逐步从一个危机模式过渡到正常基本面和流动性驱动的市场环境中。对于相对收益产品而言，此时可以沿着正常的宏观策略分析框架进行操作，通过结构的选择和品种的选择可以开始创造超额收益，而无需通过大幅仓位调整来避险。展望季度维度而言，短期经济数据、尤其是汽车和地产的数据表现出了显著的疫后修复态势，短期较强，但对于后续整体预期仍然较低，经济复苏可能仍然一波三折。外部因素看，联储后续加息节奏以及美国经济衰退的预期开始相互角力。总体而言，如果经济预期开始转暖，那么市场后续大概率将维持较好的投资机会，当前可能仍然是一个反弹的格局，因此在仓位上会保持灵活操作。板块上，由于成长板块已经反弹较多，前几周已经开始适度均衡，后续拟维持均衡配置，适度灵活操作。总体而言，我们认为今年仍然是宏观较为复杂的一年，因此在操作上仍然会保持灵活、适度逆向，均衡配置。 |  |  |
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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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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |  |  |
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|  | **§ 七. 投资组合情况** |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  | **1.报告期末产品资产组合情况** |  |  |
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| **序号** |

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| **资产类型** |

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| --- |
| **直接投资占产品总资产的比例（%）** |

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| **间接投资占产品总资产的比例（%）** |

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| --- |
| 1 |

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| --- |
| 现金及存款 |

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| --- |
| 14.76 |

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| 2 |

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| --- |
| 债券投资 |

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| 48.21 |

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| 3 |

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| 权益投资 |

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| 1.55 |

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| 公募基金 |

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|  | **2.报告期末杠杆融资情况** |  |  |  |
|  |  报告期末本产品总资产未超过该产品净资产规模的140%，符合产品协议对本产品杠杆比例的要求。 |  |  |  |
|  | **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。 |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  | **4.报告期末资产持仓前十基本信息** |  |
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| **序号** |

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| --- |
| **资产名称** |

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| **资产规模** |

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| **占产品资产净值的比例（%）** |

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| --- |
| 1 |

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| --- |
| 工商银行活期存款 |

 |

|  |
| --- |
| 400,000,000.00 |

 |

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| --- |
| 12.69 |

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|

|  |
| --- |
| 2 |

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|  |
| --- |
| 21申证03 |

 |

|  |
| --- |
| 101,976,800.00 |

 |

|  |
| --- |
| 3.24 |

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| --- |
| 3 |

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|  |
| --- |
| 21苏国信MTN003 |

 |

|  |
| --- |
| 101,951,800.00 |

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|  |
| --- |
| 3.23 |

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| --- |
| 4 |

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|  |
| --- |
| 21财信02 |

 |

|  |
| --- |
| 101,692,600.00 |

 |

|  |
| --- |
| 3.23 |

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| --- |
| 5 |

 |

|  |
| --- |
| 21乌城01 |

 |

|  |
| --- |
| 100,808,100.00 |

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|  |
| --- |
| 3.20 |

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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |  |
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| 6 |

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|  |
| --- |
| 安信稳健增利A（009100.OF） |

 |

|  |
| --- |
| 87,286,545.95 |

 |

|  |
| --- |
| 2.77 |

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|

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| --- |
| 7 |

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|  |
| --- |
| 20常城建MTN001 |

 |

|  |
| --- |
| 61,989,600.00 |

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|  |
| --- |
| 1.97 |

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| --- |
| 8 |

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| --- |
| 22海通恒信MTN002 |

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| --- |
| 59,933,760.00 |

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| --- |
| 1.90 |

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| 9 |

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| --- |
| 中欧明睿新常态A（001811） |

 |

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| --- |
| 53,458,681.13 |

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| --- |
| 1.70 |

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| --- |
| 10 |

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| --- |
| 20中原豫资MTN001 |

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| --- |
| 51,401,050.00 |

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| --- |
| 1.63 |

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|  | **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 |  |  |
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| **产品代码** |  |

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| --- |
| **资产名称** |

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|  |
| --- |
| **资产面额（元）** |

 |

|  |
| --- |
| **承销商/发行人** |

 |
|

|  |  |
| --- | --- |
| 9D210010 |  |

 |

|  |
| --- |
| 20河钢集MTN006 |

 |

|  |
| --- |
| 30,000,000.00 |

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| --- |
| 兴业银行股份有限公司 |

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| 9D210010 |  |

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| 21赣州发展MTN001 |

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| 20,000,000.00 |

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| 兴业银行股份有限公司 |

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| 9D210010 |  |

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| --- |
| 21越秀金融MTN003 |

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| --- |
| 50,000,000.00 |

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| 兴业银行股份有限公司 |

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| 9D210010 |  |

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| 22黄冈城投MTN002 |

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| 20,000,000.00 |

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| 兴业银行股份有限公司 |

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| 9D210010 |  |

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| 22兖矿能源MTN002 |

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| 30,000,000.00 |

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| 兴业银行股份有限公司 |

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|  |  |  | 5.2 理财产品在报告期内其他关联交易 |  |  |
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| --- | --- |
| **产品代码** |  |

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| --- |
| **交易标的** |

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| --- |
| **交易金额（万元）** |

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| --- |
| **交易类型** |

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| --- |
| **关联方名称** |

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|  |  |  | 5.3 理财产品在报告期内中的重大关联交易 |  |  |
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| **产品代码** |  |

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| --- |
| **资产名称** |

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| --- |
| **资产面额（元）** |

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| **交易类型** |

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| **关联方名称** |

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|  |  | **6.投资账户信息** |  |
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|

|  |
| --- |
| **序号** |

 |

|  |
| --- |
| **账户类型** |

 |

|  |
| --- |
| **账户编号** |

 |

|  |
| --- |
| **账户名称** |

 |
|

|  |
| --- |
| 1 |

 |

|  |
| --- |
| 托管账户 |

 |

|  |
| --- |
| 051010100101198641 |

 |

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| --- |
| 兴银理财兴承恒享开放式1号净值型理财产品 |

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|  | 兴银理财兴承恒享开放式1号净值型理财产品2022年半年度报告 |  |
|  |  |  |  |  |  |
|  |  |  |
|  |  |  |  |  |  |
|  | 兴银理财有限责任公司 |  |
|  | 2022年9月21日 |  |
|  |  |  |  |  |  |
|  |  | 8/ | 8 |  |  |