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|  | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品2022年半年度报告 |  |
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|  | **兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品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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|  | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品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。 |  |
|  |  |  |  |  |  |  |
|  | **§ 二. 产品基本情况** |  |
|  |  |  |  |  |  |  |
|  | 产品名称 | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品 |  |
|  | 产品代码 | 9K510370 |  |
|  | 全国银行业理财信息登记系统登记编码 | Z7002022A000103 |  |
|  | 产品运作方式 | 开放式 |  |
|  | 产品募集方式 | 私募 |  |
|  | 投资类型 | 固定收益类 |  |
|  | 报告期末产品份额总额 | 382,041,192.63份 |  |
|  | 业绩比较基准/业绩报酬计提基准 | --/-- |  |
|  | 投资币种 | 人民币 |  |
|  | 风险等级 | R2 |  |
|  | 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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| --- |
| 兴银兴承恒享稳盈一年定开6号A |

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| --- |
| 9K51037A |

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| 382,041,192.63 |

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|  | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品2022年半年度报告 |  |  |
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|  | **§ 三. 产品收益表现** |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  | 产品9K51037A自成立日以来，累计净值增长率为2.0130%，年化累计净值增长率为6.4451%。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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| 产品份额净值 |

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| 产品累计净值 |

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|  |
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| 产品资产净值 |

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|  |  |
| --- | --- |
| 9K510370 |  |

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|  |
| --- |
| 2022年6月30日 |

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| --- |
| 1.02013 |

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| 1.02013 |

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| 389,732,429.36 |

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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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| 9K51037A |  |

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| 2022年6月30日 |

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| 389,732,429.36 |

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|  | **§ 四. 产品投资经理简介** |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  罗俊鹏先生，现任兴银理财专户投资部投资经理，上海交通大学硕士，具有4年固定收益投资经验，历任兴银理财固定收益部投资助理、投资经理，负责多款上市企业专户产品及公募产品管理，管理规模近450亿，产品业绩优异，擅长利率债交易及信用债套利挖掘，投资风格灵活，专注于多策略获取组合超额回报。 |  |  |
|  |  |  |  |  |  |  |  |  |
|  | **§ 五. 报告期内产品的投资策略和运作分析** |  |  |
|  |  |  |  |  |  |  |  |  |
|  |  一、市场观点 上半年市场回顾：2022年上半年债券收益率整体呈现“W型”走势，短端下行明显，而长端收益率处于震荡区间，且信用债表现好于利率债。年初到1月底受资金面宽松、宏观经济下行压力及降准影响，债券收益率延续下行趋势。2022年1月中旬，央行降息落地，且明确表态将维持宽松的货币政策，利率大幅下行，各期限品种收益率率均创疫情以来新低。 2月到3月底，市场利率触底单边向上。美联储加息预期不断升温，2月10日公布的一月份社融数据大超预期，稳增长宽信用预期回升，叠加权益市场大幅杀跌引发公募基金赎回潮，债券抛压增加。债券收益率从最低点一路单边上行，2月10日至3月28日，我国1年期国债和10年期国债分别上行28bp和6bp，二级资本债等品种最高上行50bp，为2020年以来单月最大跌幅。 4月到5月底，疫情在以上海为代表的发达城市爆发蔓延，债券收益率快速下行。本轮疫情病例多、蔓延范围广，动态清零之下严格的管控措施对经济复苏节奏形成巨大冲击。宽松的资金面，以及绝对收益率的诉求，导致资管机构不断趋同于加杠杆的票息策略获得绝对收益率，城投债受到追捧，抢券现象在一级市场屡有发生。1年期国债收益率下行幅度在15bp左右，2-3年AA+信用主体收益率下行20-30bp，4-5年AAA高等级信用债收益率多数下行20-30bp。 6月以来，受制于上海解封、疫后复苏、权益市场连续走强等诸多因素影响，债券收益率震荡上行。 产品运作：年初到1月底资金面宽松带动收益率下行，专户产品采取提升久期、适度加杠杆的积极策略，票息打底的同时获取资本利得，产品业绩表现较为优异。2月市场回调后，及时止盈卖出利差压缩到极致的品种，降低产品实际久期，并果断降低组合仓位，同时增配货币市场工具等低波动资产和利率互换工具，降低产品波动幅度。 |  |  |
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|  | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品2022年半年度报告 |  |  |
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|  |  3月底上海疫情爆发后，我们利用专户产品期限较长、负债稳定等优势，在收益率上行后积极建仓高收益资产，同时果断加仓，并利用资金成本低的优势提高了杠杆水平，把握住了市场调整时候的建仓机会，抓住了高等级中长久期信用债、存单和金融债的行情，赚取了稳定票息收益的同时，获取债券价格上涨的资本利得。 6月以来，我们适度防守，采用中性久期、中性杠杆之下的票息策略，通过止盈部分信用债，增配货币类资产，以及构建超短+超长的哑铃型组合来降低组合波动。 下半年展望： 展望下半年，我们认为国内债券市场交易主线是疫后经济复苏和修复不及预期的博弈，货币政策的边际变化、疫情的点状爆发会对交易节奏形成扰动。具体来看，我们对三季度债券市场中性偏谨慎，认为债券市场四季度存在一定机会。短期内市场交易疫后经济复苏，社融和新增贷款增速快速回升，经济数据触底反弹，CPI有所回升，长债尚难言趋势性空间打开，我们对三季度市场保持中性偏谨慎观点。但从中长期维度看，随着美联储加息逐步落地、欧美经济衰退拖累全球经济复苏，国内稳增长宽信用举措在三季度末进入兑现期，预计四季度经济数据层面仍可能面临高点回落压力，债券品种经历调整后已经有了一定安全边际，四季度的债券市场存在一定交易机会。 二、2022年下半年投资策略 交易策略来看，策略上产品将继续保持稳健的投资风格： 1、发挥票息策略优势，同时维持中性偏积极的杠杆水平与中性的组合久期。 2、关注货币政策边际变化带来的公募基金赎回压力带来的信用债配置机会。 3、把握行业利差、区域利差变化的收益挖掘机会和利率反弹时的配置机会。 4、关注货币政策边际变化、稳增长措施落地、新冠疫情点状冲击带来的交易机会。 5、根据市场变化分步建仓，根据收益率曲线形态做波段交易。 |  |  |
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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. 投资组合情况** |  |  |
|  |  |  |  |  |  |  |  |
|  |  | **1.报告期末产品资产组合情况** |  |
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|  | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品2022年半年度报告 |  |  |  |
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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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| 现金及存款 |

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| 2.27 |

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| 债券投资 |

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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200%，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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| --- |
| 22晋能煤业PPN001 |

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| --- |
| 30,707,460.00 |

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| --- |
| 7.88 |

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| 2 |

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| --- |
| 22海创D1 |

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| --- |
| 30,101,820.00 |

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| 7.72 |

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| 3 |

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| 21信地02 |

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| --- |
| 25,511,725.00 |

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| 6.55 |

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| 4 |

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| 21海南发展MTN001 |

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| --- |
| 25,401,550.00 |

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| 6.52 |

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| 5 |

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| 21冀交投CP001 |

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| 25,066,625.00 |

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| 6.43 |

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| 22高控01 |

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| 20,227,820.00 |

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| 20潞安PPN001 |

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| 22贵州高速MTN001 |

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| 22广西旅发SCP001 |

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| 20,054,720.00 |

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|  | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品2022年半年度报告 |  |  |
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| 22高速地产SCP002 |

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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）** |

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|  |
| --- |
| **承销商/发行人** |

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|  |  |
| --- | --- |
| 9K510370 |  |

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| --- |
| 19中国华融债01(品种一) |

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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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| 21冀交投CP001 |

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| 21潞安MTN004 |

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| 21新余城建MTN002 |

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| 22广西旅发SCP001 |

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| 22九联投资SCP001 |

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| 22新疆有色MTN001 |

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| 22兴业资产MTN001 |

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| 兴业银行股份有限公司、兴业资产管理有限公司 |

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| 22宜春交通MTN001 |

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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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| 兴业资产管理有限公司 |

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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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|  | 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品2022年半年度报告 |  |  |
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|  |  | **6.投资账户信息** |  |
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| **序号** |

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| **账户类型** |

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| **账户编号** |

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| **账户名称** |

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| 托管账户 |

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| 051010100101356763 |

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| 兴银理财兴承恒享稳盈一年定期开放6号固收类理财产品 |

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|  | 兴银理财有限责任公司 |  |  |
|  | 2022年9月21日 |  |  |
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