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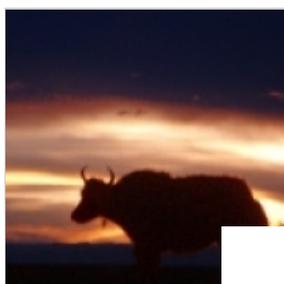
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## Looking for industry inflection point potential shares (2013-04-18 17:31:01)

Repro

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### Looking for industry inflection point potential shares

Jiu-fu Portfolio

First, we continue to focus on the latest developments in the price of gold. Tuesday the day after the rally, the international price of gold on Wednesday dropped again, but the decline was significantly reduced. To close at \$ 1,382.7 an ounce, down 0.34%. The latest transaction price bottom pick-up to a minimum of \$ 1337, as of 17:00, the price of gold has been meteoric rise, or 0.42%. Shanghai Futures Exchange price of gold on Thursday significant changes, opened lower and continued to drop, the minimum fell to 264.59 yuan, or up to 3.89%, again to refresh the lowest level in two-and-a-half years. But then gradually shock rebound meteoric rise in the afternoon to close at 275.80 yuan, or 0.18%, showing the trend of lilies bottom. The spot price of 270.89 yuan / gram, down 0.88%. The plunge in the price of gold may have triggered the massacre, April 17, Beijing Financial Street, a man jumped to his death, the identity of the deceased 60-year-old investment in CCB Board of Supervisors Wang Shiqiang, microblogging spread positions lead to violence because of gold fell. Although the company said the investigation for personal reasons, but the collapse of the price of gold for the time being is indeed a profound lesson. Following Goldman Sachs, Morgan Stanley, Deutsche Bank and other international institutions have lowered the price of gold is expected to UBS also yesterday joined the ranks bearish on gold price, UBS forecast the second quarter, the price of gold fell to 1150 dollars. According to foreign media reports, the Trust Company of the West before the commodity portfolio manager Claude ERB, Duke University finance professor Campbell Harvey in June last year, an academic study of the cooperation that the fair value of the gold close to 800 U.S. dollars / ounce, this at the moment, the forecast has increasingly shown its predictability. Erb said Monday morning, the gold price decline will soon end expectation is not realistic. He believed that the gold market is in the well-known theory of Elisabeth Kubler-Ross' five stages of grief "first stage" deny ", the remaining four stages: anger, bargaining, depression and acceptance. The past five years, the two commodity market, the most reassuring trading patterns - long gold, short natural gas is mainly based on central banks around the world continue to devaluation of the currency, and the U.S. shale gas revolution brought significant increase in natural gas supply. However, these two trends is likely to be reversed,

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Goldman Sachs recently boasted: forget gold, buy gas! Back to the stock market, after a few days ago the panic sell into the market gradually stabilized. A shares in the context of U.S. stocks fell again to pull out the red plate, showing the determination of the "irreconcilable". Both Shanghai and Shenzhen opened lower, short-sell new lows, the index gradually stabilization and recovery, and out of the wave of heavy volume of small climax. Persistent uplink could not continue, the meteoric rise of stock index dropped again, after trading hours more than the disk into a dull, has been around previous closing within a narrow range, stock index closed at 2197.60 points, up 3.8 points, or 0.17%, deep into The index closed at 8888.02 points, down 6.35 points, or 0.07%; SMEs board index rose 0.23%, the GEM index reported or 0.69%. GEM perform significantly better than the broader market, such as two days ago, upside efforts have been significantly weakened. Morphology observed from the K-line market, re-build a "platform" is to do at the end, or "jumping", can be seen from the current amount still at a very low level, indicating that the trend is still difficult to determine. In general, the market choose to break direction, there must be an external event occurs, prompting market upheaval. Obviously, the heavyweight news such as for banking supervision, shadow banks, local debt news, IPO restart the message may break the current Shanghai Composite Index in 2200 near balance short wait may be a better choice. Stocks in a weak market differentiation serious, the industry quietly change or inflection point sector stocks have been out of the cattle market, created a country shares like early glyphosate prices continue to rise, Xin shares continued to rally. According to industry reports, the price of glyphosate in the beginning of last year at 24,200 yuan / ton in early 2013, the price rose to 33,900 yuan / ton, up 40.08% compared to the beginning of 2012, glyphosate prices continue to rise to 3.54 million / ton, compared with 2012, up 46.28% from the beginning of the year. Glyphosate performance of listed companies rose triggered a collective surge the leading country shares the first quarter of this year, net profit growth of up to 1000%, the share price rose continuously from early December last year, the biggest increase so far has been more than 200%. Recently reported, recent Spandex Price sharp rise. 40D, for example, the increase rate of 2000-3000 yuan / ton, has even a single day or 1,000 yuan / ton. The industry believes that, Spandex prices are mainly demand season, the recent rally is expected to continue, optimistic 40D may reach 50,000 yuan / ton. In recent days leading Huafeng Spandex pulled out five with Yang, recently hit a new high, from the previous month to the lowest point or close to 100%. Thus, in economic structural adjustment, changes in the industry will inevitably have a significant impact on the performance of listed companies. Industry inflection point to capture the industry leader is the focus of the recent investment.

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