

国家数据局下设五司正式确立

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投资要点:

- **国家数据局下属五司正式确定。**根据2月9日国家公务员局官网,《国家数据局2024年公务员录用面试公告》显示,国家数据局下设的五个司局名称目前已经正式确定为:综合司、政策规划司、数据资源司、数字经济司、数字科技和基础设施建设司。
- **国家数据局招考岗位要求。**根据国家公务员局官网《中央机关及其直属机构2024年度考试录用公务员招考简章》,新组建的国家数据局共公布了所属5个用人司局的7类职位,定级为机关司局一级主任科员及以下,共招考12人,要求基层最低工作年限为3年,工作地点均在北京市西城区。各岗位的主要工作内容包括:从事数据治理和发展政策研究,参与数据领域、数字经济国际合作工作;参与数据基础制度和政策研究,参与数据相关重大战略、重大规划、重大改革、重大活动等工作;从事数据资源管理和开发利用推进相关工作;参与研究拟定数字经济有关发展战略、规划和政策,协同推进数字产业化和产业数字化,承担有关综合管理工作。另有两个职位将参与数据领域技术应用推广示范、基础设施规划建设等相关工作,分别要求具备人工智能研究、实践经验与密码学研究经验。根据中国新闻周刊百家号,国家数据局局长刘烈宏在接受媒体采访时表示,结合国家数据局的职能定位,重点招录既懂专业又懂行业的融合型人才,“这次我们围绕数字中国建设、围绕数字经济的发展,招一些熟悉这方面工作、具有良好的专业背景、善于做规划、有很强的统筹协调能力、有工作经历的公务员”。
- **协调推进数据基础制度建设,统筹推进数字中国建设。**国家数据局于2023年10月25日正式揭牌。根据中共中央、国务院印发的《党和国家机构改革方案》(以下简称方案),国家数据局负责协调推进数据基础制度建设,统筹数据资源整合共享和开发利用,统筹推进数字中国、数字经济、数字社会规划和建设等,由国家发展和改革委员会管理。根据方案,将中央网络安全和信息化委员会办公室承担的研究拟订数字中国建设方案、协调推动公共服务和社会治理信息化、协调促进智慧城市建设、协调国家重要信息资源开发利用与共享、推动信息资源跨行业跨部门互联互通等职责,国家发展和改革委员会承担的统筹推进数字经济发展、组织实施国家大数据战略、推进数据要素基础制度建设、推进数字基础设施布局建设等职责划入国家数据局。
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APPENDIX 1

Summary

Investment Highlights:

The National Bureau of Data has officially established five departments. The recruitment for 12 positions across these departments requires a minimum of 3 years of grassroots experience, with all roles based in Xicheng District, Beijing. Main responsibilities include data governance, policy research, international cooperation in digital economy, and infrastructure planning.

Investment advice: The structuring of the National Bureau of Data is expected to drive the establishment of local data management agencies and the development of foundational data systems. Companies to watch include Shanghai Ganglian E-Commerce Holdings, Fujian Boss Software, Ctj Information Technology, Guangzhou Sie Consulting, Beijing E-hualu Information Tech, INESA Intelligent Tech, Shenzhen Sed Industry, Taiji Computer Corporation, Sichuan Jiuyuan Yin Hai Software, Dareway Software Co.,Ltd., Wonders Information, Dataway Horizon, Transwarp Technology(Shanghai), Guotai Epoint Software, Linewell Software, Beijing eGOVA, and Shenzhen Infogem Technologies.

Risk Warning: Risks of policy implementation falling short of expectations.

附录 APPENDIX

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弱于大市，未来 12-18 个月内预期相对基准指数跌幅在 10%以上，基准定义如下

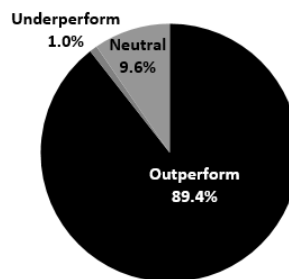
各地股票基准指数：日本 - TOPIX, 韩国 - KOSPI, 台湾 - TAIEX, 印度 - Nifty100, 美国 - SP500; 其他所有中国概念股 - MSCI China.

Ratings Definitions (from 1 Jul 2020):

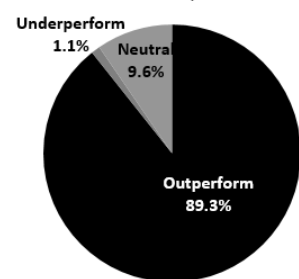
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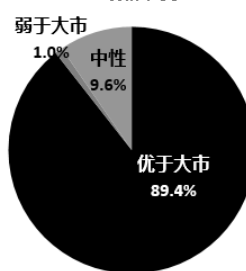
Most Recent Full Quarter



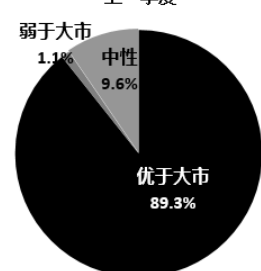
Prior Full Quarter



最新季度



上一季度



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Outperform: The stock's total return over the next 12-18 months is expected to exceed the return of its relevant broad market benchmark, as indicated below.

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	优于大市	中性 (持有)	弱于大市
海通国际股票研究覆盖率	89.4%	9.6%	1.0%
投资银行客户*	3.9%	5.1%	5.6%

*在每个评级类别里投资银行客户所占的百分比。

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买入，未来 12-18 个月内预期相对基准指数涨幅在 10%以上，基准定义如下

中性，未来 12-18 个月内预期相对基准指数变化不大，基准定义如下。根据 FINRA/NYSE 的评级分布规则，我们会将中性评级划入持有这一类别。

卖出，未来 12-18 个月内预期相对基准指数跌幅在 10%以上，基准定义如下

各地股票基准指数：日本 – TOPIX, 韩国 – KOSPI, 台湾 – TAIEX, 印度 – Nifty100; 其他所有中国概念股 – MSCI China.

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	Outperform	Neutral (hold)	Underperform
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IB clients*	3.9%	5.1%	5.6%

*Percentage of investment banking clients in each rating category.

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SELL: The stock's total return over the next 12-18 months is expected to be below the return of its relevant broad market benchmark, as indicated below.

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