

市場走勢

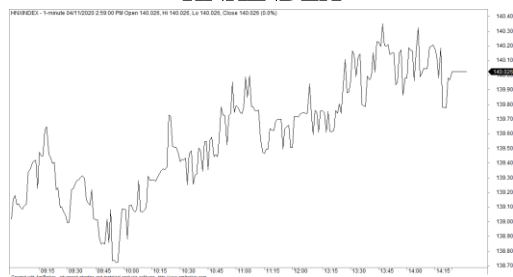
市場指數	VNI	HNI	UPCOM
收盤	939.76	140.03	63.50
%日	0.47%	1.05%	0.57%
%週	2.03%	4.47%	1.23%
%月	3.28%	3.80%	1.84%
%年	-8.09%	31.36%	12.21%
<b>成交值(十億盾)</b>			
當日	6,912	729	273
日均量/週	6,526	557	349
日均量/月	8,041	808	470
<b>外資進出</b>			
買進	338.12	20.37	12.60
賣出	977.87	3.00	16.41
買賣超	-639.75	17.37	-3.81
<b>市場漲跌家數</b>			
上漲	221	90	110
下跌	89	54	74
持平	90	217	719
<b>市場指標</b>			
P/E	15.76	10.03	19.74
總市值 (兆盾)	3,333	246	826
股息殖利率	2.33%	4.06%	4.41%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

儘管市場在盤中強勁震盪，但該指數仍錄得成功的交易盤，因收盤價高於中位數。VN-Index 上漲 0.47%，收於 939.76 點。HNX-Index 上漲 1.05%，收於 140.03 點。Upcom-Index 上漲 0.57%。市場的交易價值繼續增長，達 6 兆 9,650 億越南盾。

今天的漲勢有更為積極的共識，因為 VN-Index 中有 297 檔股票上漲和 119 檔下跌。HDB (+3.5%)，GAS (+2.4%)，VRE (+1.6%)，CTG (+1.3%)，MBB (+1.1%) 等是帶領市場漲勢的股票。不利的是，VIC (-0.9%)，REE (-0.7%)，MWG (-0.4%)，HPG (-0.2%) 是逆市而行的藍籌股。

中型股和小型股繼續強勁上漲勢頭並吸引了現金流。值得關注的股票是 FLC (+6.7%)，GEX (+6.8%)，DXG (+4.7%)，DIG (+4.9%)，TTF (+6.9%)，SZC (+6.8%) 等。

在行業方面，油氣股 (GAS (+2.4%)，PVD (+2.8%)，PVS (+1.5%))，漁業 (ASM，ANV，MPC，VHC)，房地產 (SZC，LDG，FLC，DXG) 的走勢十分積極。另一方面，建材集團 (HPG，HSG) 的表現要弱於市場。

外資繼續強勁賣超，價值為 6,260 億越南盾，其中 HPG (2,020 億)，VRE (1,000 億)，MSN (930 億) 排在賣超名單之首。在買超方面，只有 VNM (280 億) 的買超價值超過 100 億越南盾。

市場短期觀點

我們認為市場可能會在下一盤保持漲勢，而 VN-Index 可能會重新測試 942 點的阻力位。同時，市場仍處於積累階段，表明短期風險持續下降，短期趨勢逐漸向好，但現金流量可能仍將繼續集中中型股在小型股上。

整體市場的短期趨勢從下跌轉為中立。因此，我們建議短期投資者限制當前價格範圍內的賣出股票，並注意每檔股票的趨勢，以尋找投資的機會，比例低於 40%。

請在 <https://ysradar.yuanta.com.vn/> 查看有關股票的信號。



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### 技術分析圖



指數技術分析圖 VN-Index



指數技術分析圖 HNX-Index

指數	短期趨勢	中期趨勢	阻力區 1	阻力區 2	支撐區 1	支撐區 2
VN-Index	中立	上漲	942	1,000	905	890
HNX-Index	中立	上漲	142	153	132	114
VN30	中立	上漲	950	990	903	870
VNMidcaps	中立	上漲	992	1,030	969	963
VNSmallcaps	中立	上漲	835	845	822	804



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	939.76	0.47%
VN30	905.48	0.37%
VN Mid	1007.66	1.49%
VN Small	838.64	1.25%

河內交易所 (HSX)

	收盤	漲跌%
HNI	140.03	1.05%
HN30	254.76	0.68%
VNX AllSh	869.33	0.53%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	63.5	0.57%

外資交易	成交值 (十億盾)
買進	338.12
賣出	977.87
買超/賣超	-639.75

外資交易	成交值 (十億盾)
買進	20.37
賣出	3.00
買超/賣超	17.37

外資交易	成交值 (十億盾)
買進	12.60
賣出	16.41
買超/賣超	-3.81

上漲排名/ 股碼	漲跌 (VND)	漲跌%
TTF	390	6.90%
HTN	2150	6.90%
SZC	1650	6.85%
LHG	1650	6.83%
ANV	1350	6.78%

上漲排名/ 股碼	漲跌 (VND)	漲跌%
DTD	1100	5.19%
VIX	700	5.11%
SHS	400	3.13%
VCS	1600	2.21%
ACB	500	2.00%

上漲排名/ 股碼	漲跌 (VND)	漲跌%
VLB	2505	8.08%
LTG	962	4.06%
KDF	1291	3.39%
VCR	626	3.38%
SIP	2925	3.04%

下跌排名/ 股碼	漲跌 (VND)	漲跌%
PDR	-1300	-3.00%
NBB	-500	-2.14%
TCL	-350	-1.42%
HDC	-300	-1.27%
TNA	-150	-1.04%

下跌排名/ 股碼	漲跌 (VND)	漲跌%
NVB	-200	-2.25%
TIG	-100	-1.69%
DDG	-200	-0.71%
NDN	-100	-0.55%
VCG	-200	-0.48%

下跌排名/ 股碼	漲跌 (VND)	漲跌%
DRI	-581	-7.64%
C4G	-17	-0.23%
PRT	0	0.00%
BSR	9	0.13%
VCP	83	0.17%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	十億盾
VIC	353,126
VCB	315,255
VHM	249,345
VNM	225,055
BID	158,468

市值排名/ 股碼	十億盾
ACB	54,039
SHB	27,734
VCG	18,287
VCS	11,221
IDC	8,010

市值排名/ 股碼	十億盾
ACV	136,698
VEA	56,952
MCH	52,464
BSR	20,928
MSR	15,581

交易量排 名/股碼	成交值	30 日均
TCB	22,027,670	23,652,430
FLC	20,316,520	16,990,510
HPG	18,313,403	17,335,740
GEX	15,457,839	7,528,370
HDB	11,838,090	1,844,870

交易量排 名/股碼	成交值	30 日均
ACB	12,653,096	10,892,561
PVS	4,074,467	5,009,509
SHS	2,715,749	3,206,170
NVB	2,588,811	2,536,013
KLF	2,295,563	2,442,139

交易量排 名/股碼	成交值	30 日均
PRT	2,200,700	378
G36	1,623,146	1,176,417
DRI	1,319,600	614,774
BSR	1,126,200	2,377,796
PFL	1,115,000	467,648

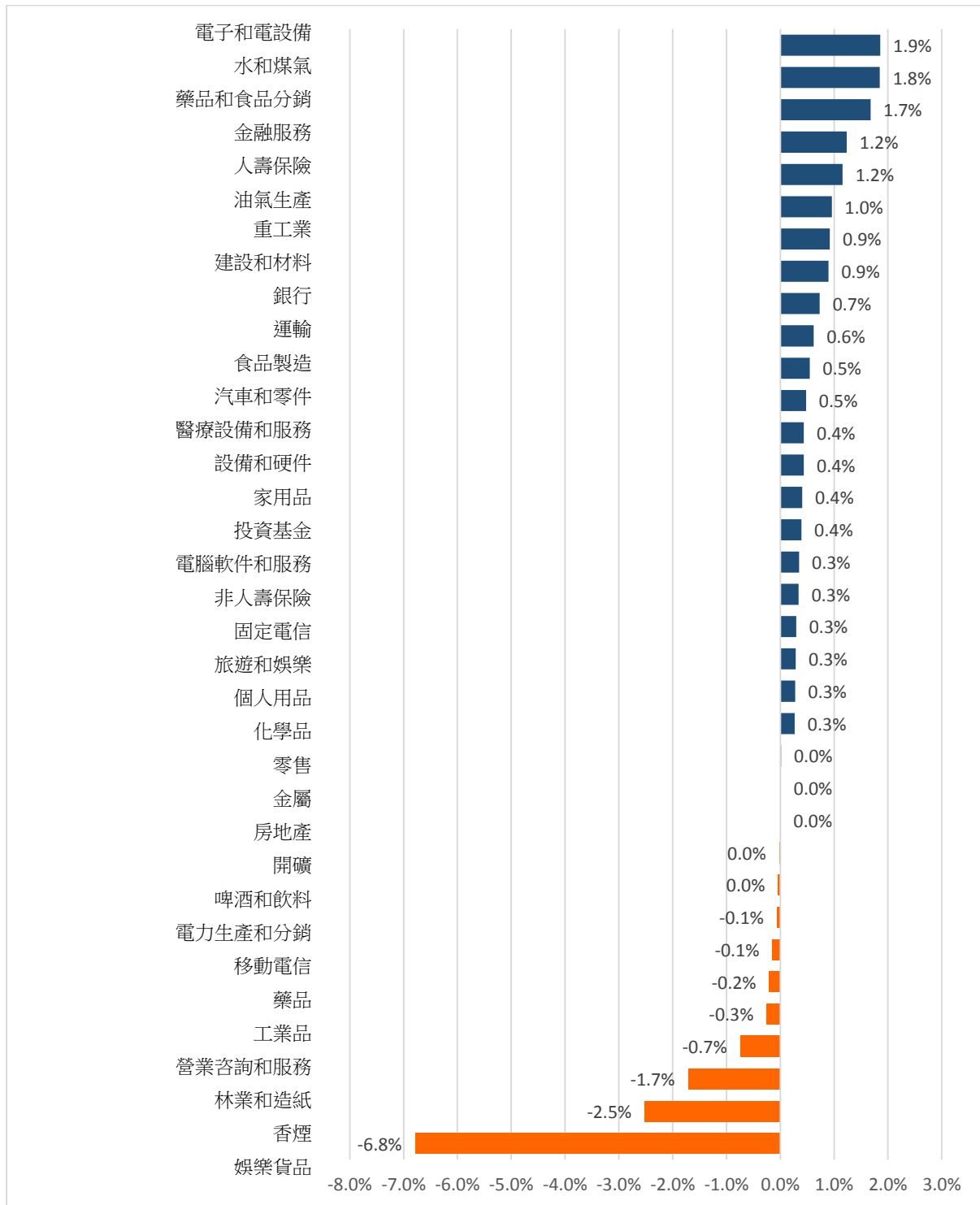
資料源: Bloomberg & Yuanta Research

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## 各行業板塊的交易走勢



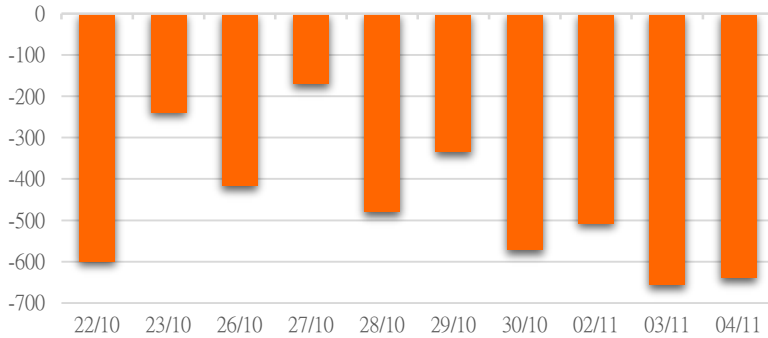
資料源: FiinPro - YSVN



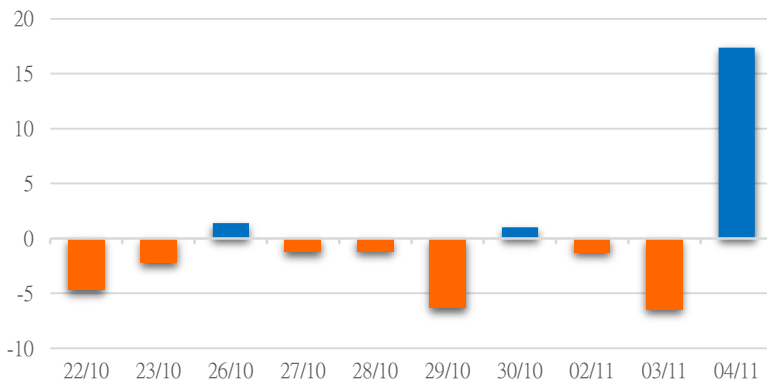
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## 外資買進賣統計

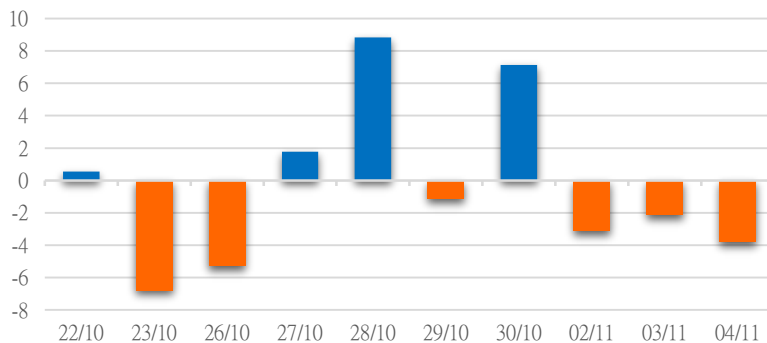
HSX 外資每日買/賣超



HNX 外資每日買/賣超



UPCOM 外資每日買/賣超



證券代碼	買超金額 (百萬盾)	證券代碼	賣超金額 (百萬盾)
VNM	27,627	HPG	201,984
SBT	9,914	VRE	100,003
HSG	7,782	MSN	93,302
IMP	6,598	VHM	86,147
DGW	6,128	GEX	39,518

HSX 外資買/賣超的前 5 名

證券代碼	買超金額 (百萬盾)	證券代碼	賣超金額 (百萬盾)
PVS	6,826	CAN	694
SHS	5,298	VCG	490
VCS	3,952	SLS	341
TNG	1,718	NHA	236
SHB	390	BVS	54

HNX 外資買/賣超的前 5 名

證券代碼	買超金額 (百萬盾)	證券代碼	賣超金額 (百萬盾)
MCH	6,607	VEA	838
ACV	2,245	LTG	640
SWC	339	CTR	205
ADG	149	ABI	180
BSR	37	BDG	179

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YS



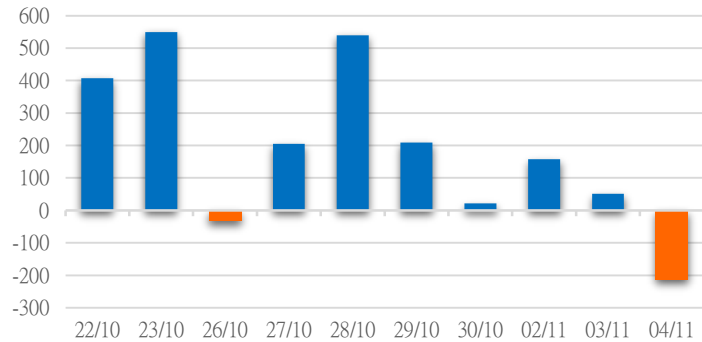
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### 自營進出統計

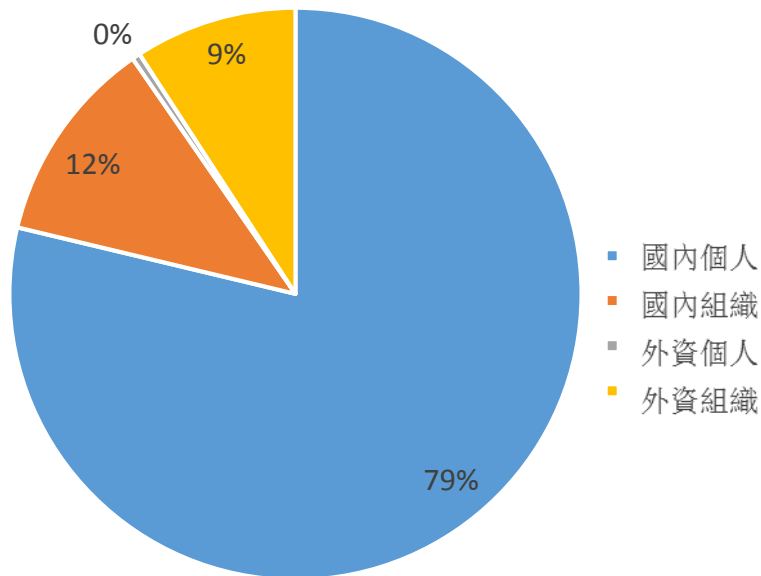
證券代碼	買超金額 (百萬盾)	證券代碼	賣超金額 (百萬盾)
FUEVFNVD	17,646	PNJ	34,247
VRE	6,081	KDH	31,970
GAS	3,991	TCB	21,402
PAC	626	CTG	20,391
CII	470	VPB	19,506

券商自營交易最大前名

券商自營交易每日買/賣超 (bil.VND)



### 越南證券市場投資人類別統計

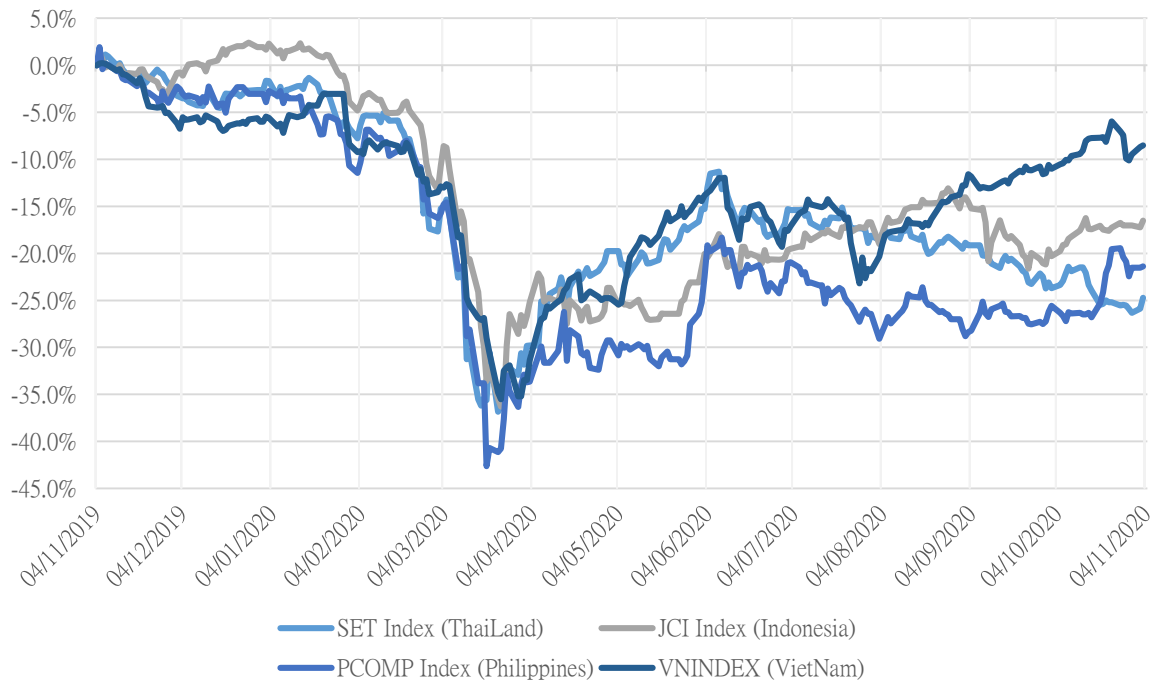


資料源: FinPro - YSVN



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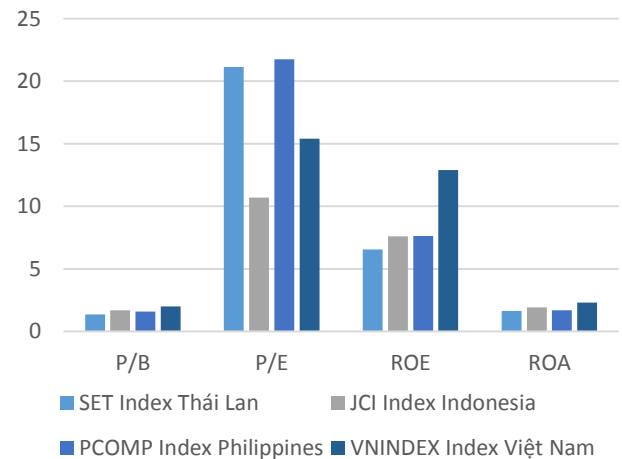
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	1.7x	1.6x	2.0x
P/E		21.2x	10.5x	21.5x	15.1x
ROE	%	6.48	7.86	7.82	13.15
ROA	%	1.63	1.99	1.73	2.34
Vốn hóa	Tỷ USD	419.70	404.47	168.72	147.88
GTGD	Triệu USD	1.17	0.52	0.09	0.33
LS cổ tức	%	3.52	2.72	1.77	1.80

源：Bloomberg & YSVN



■ SET Index Thái Lan    ■ JCI Index Indonesia  
■ PCOMP Index Philippines    ■ VNINDEX Index Việt Nam



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