

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	937.75	138.30	63.31
%日	-0.21%	-1.24%	-0.30%
%週	2.03%	2.92%	0.91%
%月	2.52%	0.81%	0.80%
%年	-8.45%	29.60%	11.84%
成交值(十億盾)			
當日	6,258	526	386
日均量/週	6,238	539	345
日均量/月	7,972	796	466
外資進出			
買進	603.89	11.24	13.59
賣出	577.13	4.14	16.91
買賣超	26.77	7.10	-3.32
市場漲跌家數			
上漲	98	58	84
下跌	211	104	97
持平	91	199	722
市場指標			
P/E	15.52	10.11	21.99
總市值 (兆盾)	3,348	248	830
股息殖利 率	2.32%	4.06%	4.43%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場放慢了漲勢，賣壓在阻力位傾向於增加，因此該指數收盤紅跌。VN-Index 繼續在 942 點處遇到阻力，並再次修正，下跌 0.21%，收於 937.75 點。HNX-Index 明顯下跌，跌幅為 1.24%，收於 138.3 點。Upcom-Index 下跌 0.3%。三大市場的交易價值與前一盤相比減少，為 6 兆 0,870 億越南盾。

市場各股的趨勢有所分化，其中銀行股和油氣股下跌，如 VPB (-2.1%)，BID (-1.8%)，TCB (-1.6%)，CTG (-1.1%)，GAS (-0.6%)。此外，FPT (-1.9%)，HPG (-1.3%) 在當天亦錄得負面走勢。接近尾盤時，拋售壓力增加，導致股票市場縮小了廣度。收盤，VN-Index 中有 276 檔下跌，148 檔上漲。

在上漲方面，有 2 檔房地產股 KDH (+2.7%)，VIC (+1%) 以及 MSN (+4.4%)，PNJ (+1.3%) 是市場的支柱。MSN 收於盤中最高水平 87,900 越南盾，成為市場的亮點。

外資在三大市場買超 300 億越南盾，其中 VNM (850 億)，VIC (510 億) 和 MBB (270 億) 是外資積極收購的股票。在賣超方面，MSN (750 億)，HPG (450 億) 和 VHM (340 億) 位居榜首。

市場短期觀點

我們認為，市場在所有事件尚不清楚的情況下，會繼續窄幅波動，並在下一盤傾向於橫盤移動，尤其是投資者仍在關注美國大選。同時，我們認為短期風險繼續趨於下降，與前幾盤相比，投資者悲觀的情緒已有所改善。此外，各類股票之間的現金流量可能仍然存在分化，特別是中小型股將繼續吸引現金流量。

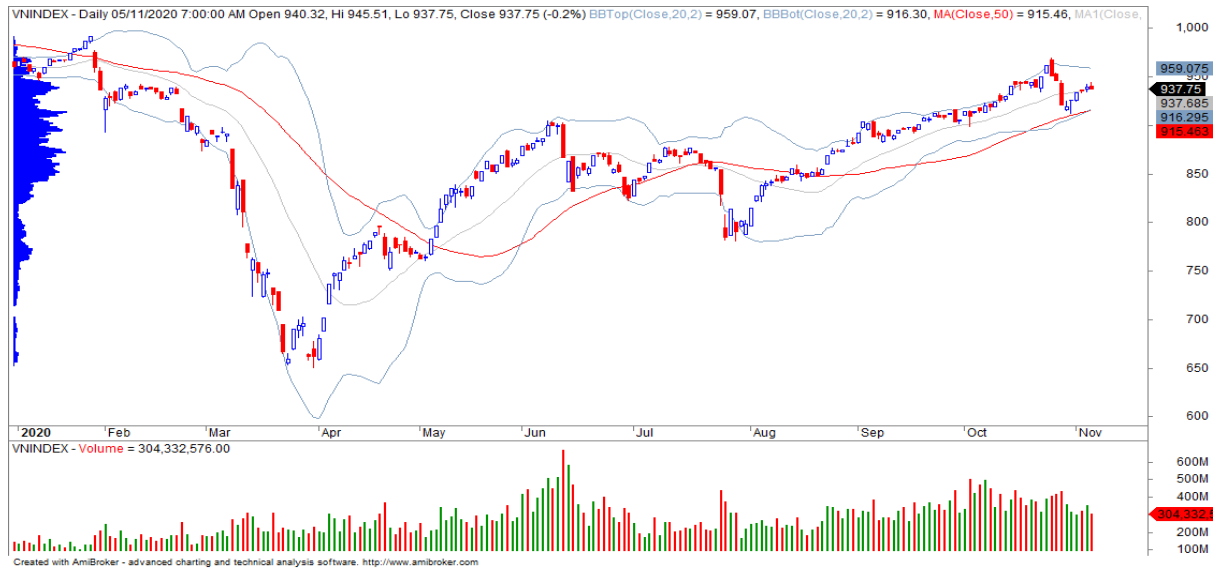
整體市場的短期趨勢仍然是中立。因此，我們建議短期投資者停止拋售股票，並注意每檔股票的走勢，以低於 40% 的比例進行新的投資。

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

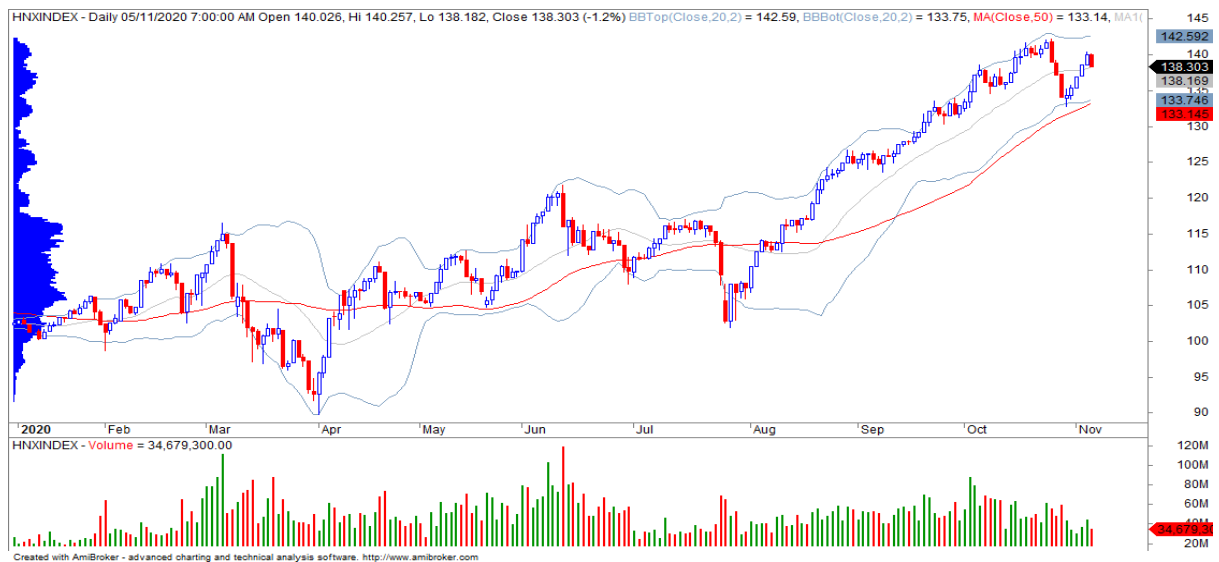


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技術分析圖



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	937.75	-0.21%
VN30	903.64	-0.20%
VN Mid	1000.04	-0.76%
VN Small	835.71	-0.35%

河內交易所 (HSX)

	收盤	漲跌%
HNI	138.3	-1.24%
HN30	252.86	-0.75%
VNX AllSh	867.53	-0.21%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	63.31	-0.30%

外資交易	成交值 (十億盾)
買進	603.89
賣出	577.13
買超/賣超	26.77

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買進	11.24
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買超/賣超	7.10

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買進	13.59
賣出	16.91
買超/賣超	-3.32

上漲排名/ 股碼	漲跌 (VND)	漲跌%
MSN	3700	4.39%
TDP	1200	3.85%
IJC	400	3.28%
OGC	220	2.87%
HTN	900	2.70%

上漲排名/ 股碼	漲跌 (VND)	漲跌%
SLS	2900	5.12%
HLD	1000	3.57%
TNG	200	1.65%
NVB	100	1.15%
NDN	100	0.55%

上漲排名/ 股碼	漲跌 (VND)	漲跌%
G36	521	5.54%
C4G	350	4.67%
QNS	488	1.55%
ADG	770	1.34%
MPC	350	1.26%

下跌排名/ 股碼	漲跌 (VND)	漲跌%
GEG	-850	-5.38%
FLC	-200	-4.16%
GVR	-600	-3.87%
TTF	-230	-3.81%
SZC	-850	-3.30%

下跌排名/ 股碼	漲跌 (VND)	漲跌%
TAR	-500	-2.42%
ACB	-600	-2.35%
LAS	-200	-2.33%
SHS	-300	-2.27%
IDC	-600	-2.24%

下跌排名/ 股碼	漲跌 (VND)	漲跌%
DRI	-274	-3.91%
LTG	-721	-2.92%
BVB	-169	-1.35%
OIL	-96	-1.17%
MSR	-159	-1.01%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	十億盾
VIC	350,082
VCB	315,255
VHM	249,674
VNM	225,682
BID	159,875

市值排名/ 股碼	十億盾
ACB	55,120
SHB	28,085
VCG	18,198
VCS	11,469
IDC	8,040

市值排名/ 股碼	十億盾
ACV	137,271
VEA	57,702
MCH	53,193
BSR	21,111
MSR	15,601

交易量排 名/股碼	成交值	30 日均
TCB	20,205,660	24,278,643
HPG	11,598,310	17,283,868
GEX	11,543,790	7,897,803
GEG	10,502,610	467,749
FLC	10,227,270	16,190,545

交易量排 名/股碼	成交值	30 日均
ACB	8,550,742	10,704,352
SHB	2,475,902	3,056,530
KLF	2,439,650	2,313,948
NVB	1,870,000	2,520,809
SHS	1,848,400	3,110,209

交易量排 名/股碼	成交值	30 日均
KLB	13,945,899	35,404
G36	1,789,500	1,211,487
PVM	1,280,600	65,291
DRI	965,600	651,604
BVB	684,700	1,662,452

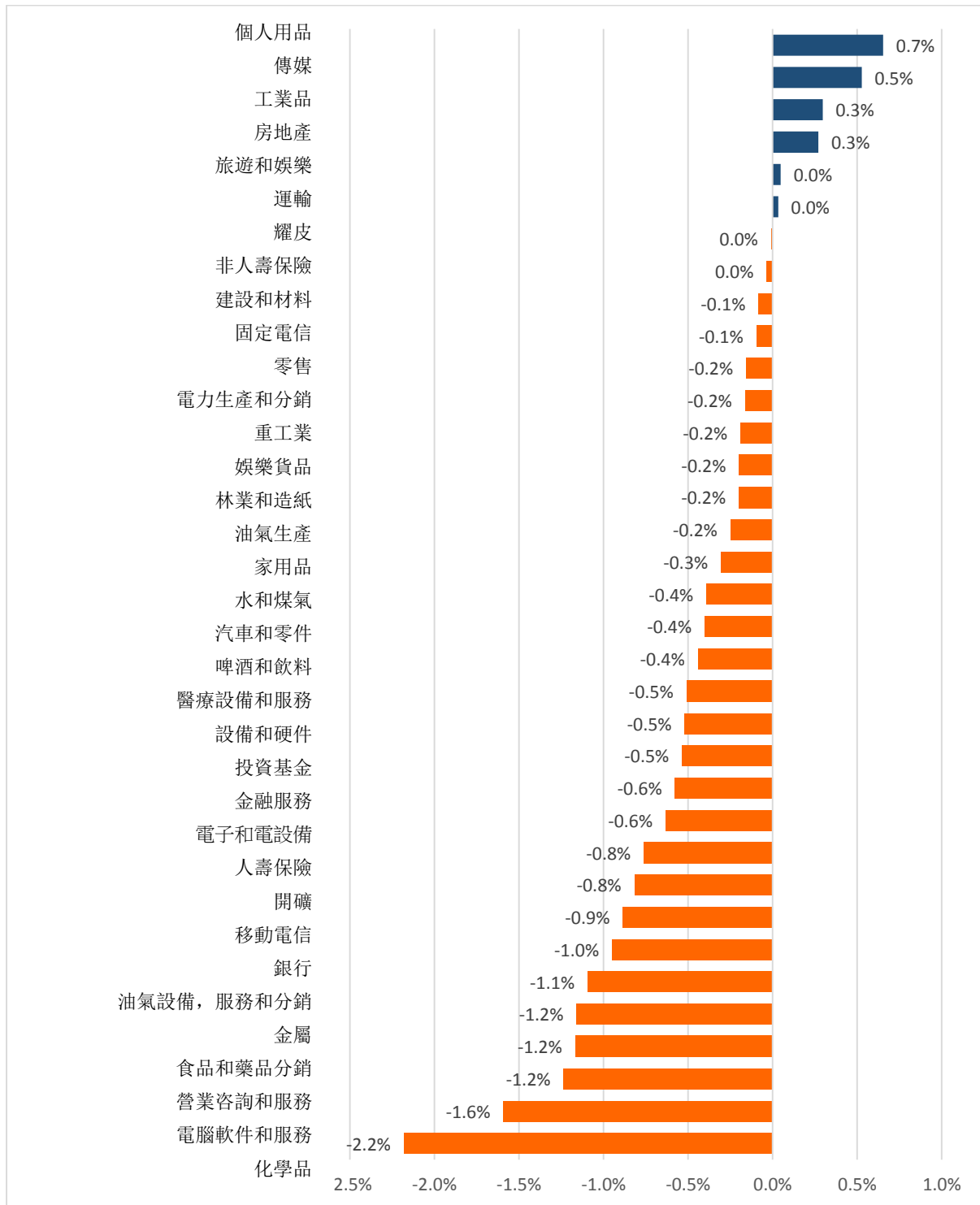
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



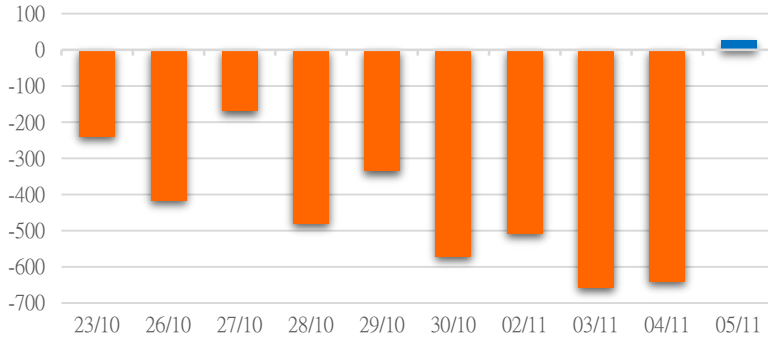
資料源: FiinPro - YSVN



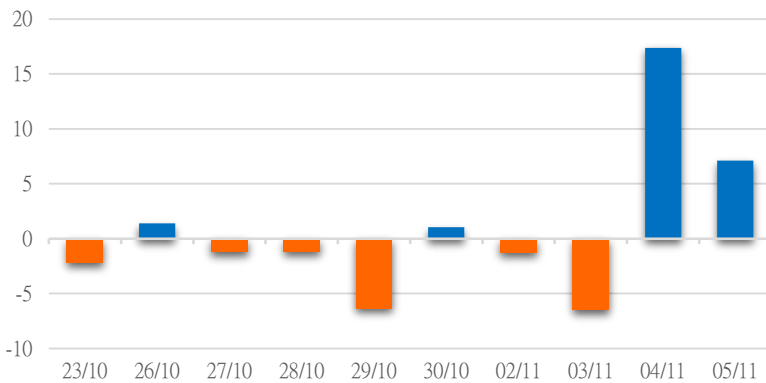
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外資買進賣統計

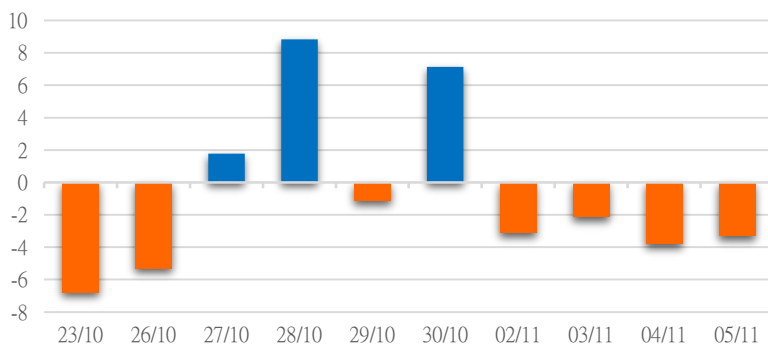
HSX 外資每日買/賣超



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	85,240	MSN	75,418
VIC	51,461	HPG	45,336
MBB	27,451	VHM	34,010
HCM	16,029	HDB	15,705
PNJ	15,349	GEX	13,849

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)
SHS	6,868	SLS	1,102
TNG	1,861	CAN	890
VCS	380	VCG	644
BNA	235	NHA	433
IDV	202	NBC	133

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)
ACV	4,716	LTG	13,517
NTC	2,133	QNS	1,296
MCH	1,733	BDG	128
VEA	169	SGP	106
MML	87	SKH	72

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YS



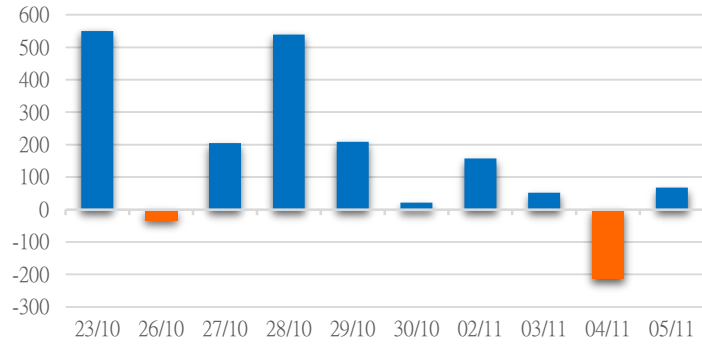
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自營進出統計

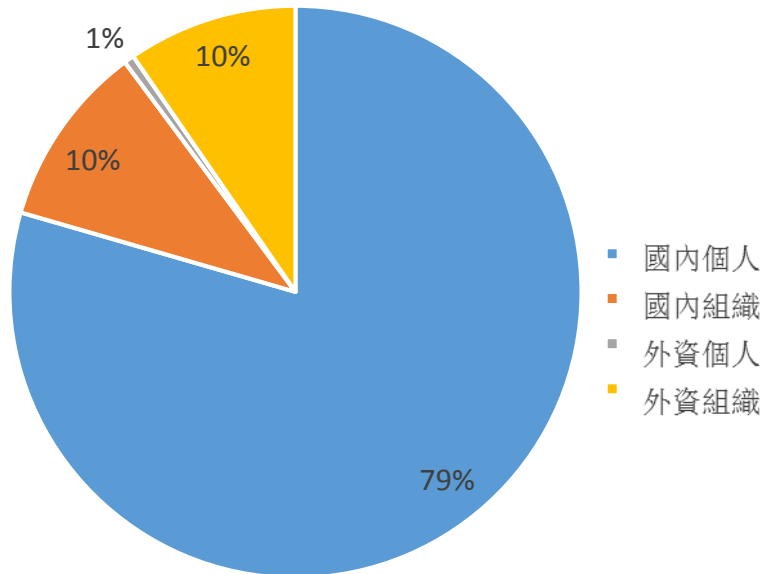
證券代碼	買超金額 (百萬盾)	證券代碼	賣超金額 (百萬盾)
VNM	18,086	VIC	62,507
TCB	14,411	FUEVFNVD	8,372
HPG	12,947	E1VFN30	2,562
VRE	12,881	MWG	2,314
VCB	9,564	PLX	1,477

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

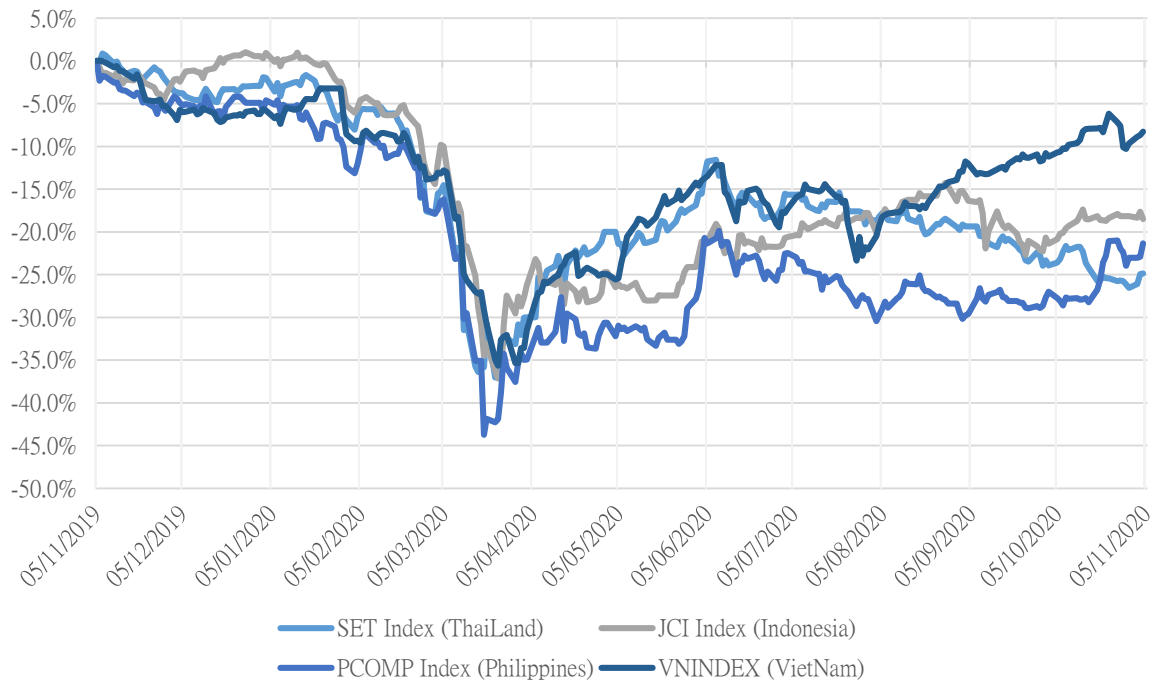


資料源: FinPro - YSVN



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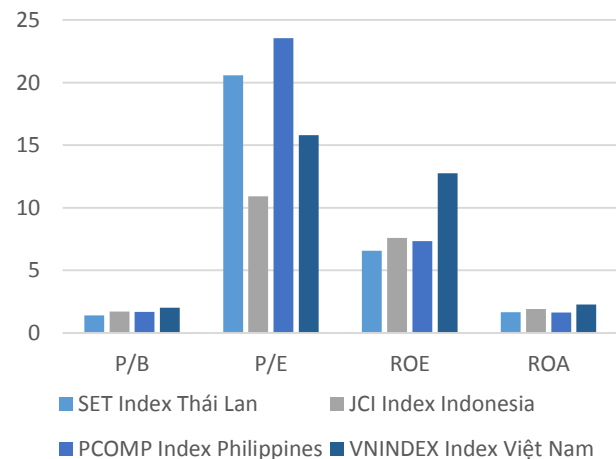
東南亞主要市場走勢比較



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





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