

當日市場：外資又在市場上賣超

2021/02/08

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,083.18	220.76	72.65
%日	-3.88%	-1.38%	-1.68%
%週	4.60%	5.70%	2.21%
%月	-7.24%	1.55%	-4.50%
%年	15.14%	110.41%	30.29%

成交值(十億盾)

當日	16,408	1,939	732
日均量/週	13,885	1,777	723
日均量/月	16,214	2,267	930

外資進出

買進	1,344.78	41.73	30.32
賣出	2,751.99	20.00	37.41
買賣超	-1,407.21	21.72	-7.09

市場漲跌家數

上漲	65	59	82
下跌	281	129	135
持平	67	174	686

市場指標

P/E	17.54	14.74	27.10
總市值 (兆盾)	4,229	265	1,013
股息殖利 ²	2.63%	3.86%	3.91%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

假期前的謹慎加上病疫觸發了當日開盤時的賣壓。VN-Index 收盤下跌 3.88%，報 1083.18 點，而 HNXIndex 也收盤下跌 1.38%，報 220.76 點。Upcom-Index 也同步下跌 1.68%。總體市場在深跌的交易日中的流動性增至 17 兆 7,350 億越南盾，表明賣力主導著當日的市場。

隨著上漲和下跌的股票數量比例的收縮，大規模的拋售壓力出現在市場上。大型股強勁下跌，如 VIC，VNM，TCB，HPG，CTG，VRE，VCB 等。PDR (+1.5%)，REE (+0.9%)，SBT (+0.2%) 是 VN30-Index 中上漲 3 檔股票。此外，PVD (+1.8%)，KDC (+2%)，AGR (+4.5%)，LSS (+5.9%)，GIL (+6.9%) 卻逆市而行，但僅是中小型的股票。

外資在市場上賣超，價值 1 兆 3,920 億越南盾，其中 HPG (2,710 億)，VHM (1,720 億)，VNM (1,460 億) 和 VCB (1,190 億) 的藍籌股被大量拋售。在買超的方面，FUESSVFL (600 億)，VJC (330 億) 和 FUEVFNND (290 億) 是外資購買最多的股票。

市場短期觀點

我們認為，市場可能在下一個交易日中反彈並接近 20 日均線。同時，市場仍處於積累階段，因此現金流在下一個交易日可能會繼續分化，尤其是現金流仍可以集中在大型股上。積極的是，VN-Index 保持了 1,075-1,083 點的支撐位，這是 2021 年 2 月 3 日形成的價格上漲缺口的區域。

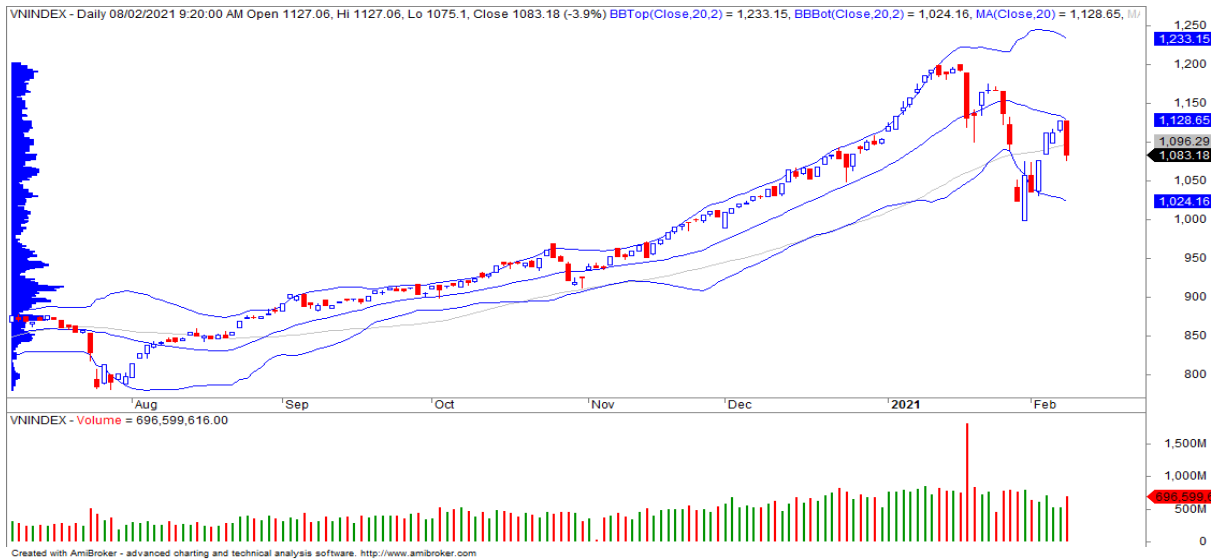
總觀市場的短期趨勢仍然為上漲。因此，我們建議短期投資者繼續持有投資組合中較高比例的股票，並利用修正階段來增加他們的股票比重或購買新股票。

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

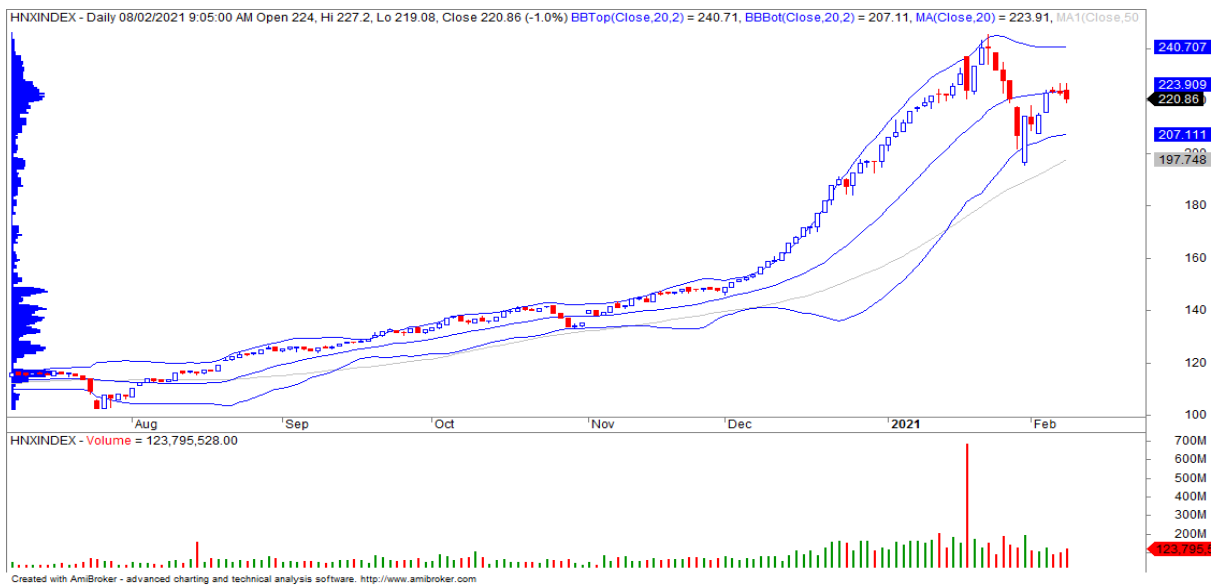


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技術分析圖



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	上漲	中立	1137	1200	970	910
HNX-Index	上漲	中立	231	248	196	180
VN30	上漲	中立	1150	1170	960	900
VNMidcaps	上漲	中立	992	1,030	969	963
VNSmallcaps	上漲	中立	835	845	822	804



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1083.18	-3.88%
VN30	1093.84	-3.67%
VN Mid	1288.34	-3.46%
VN Small	1058.39	-2.23%

河內交易所 (HSX)

	收盤	漲跌%
HNI	220.76	-1.38%
HN30	329.33	-2.85%
VNX AllSh	1047.69	-3.66%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	72.65	-1.68%

外資交易	成交值(十億盾)
買進	1344.78
賣出	2751.99
買超/賣超	-1407.21

外資交易	成交值(十億盾)
買進	41.73
賣出	20.00
買超/賣超	21.72

外資交易	成交值(十億盾)
買進	30.32
賣出	37.41
買超/賣超	-7.09

上漲排名/股碼	漲跌 (VND)	漲跌%
GMC	1900	6.93%
GIL	3700	6.86%
LSS	600	5.88%
AGR	500	4.55%
ITC	550	3.46%

上漲排名/股碼	漲跌 (VND)	漲跌%
SCI	5200	9.96%
DTD	1000	3.92%
TIG	200	2.90%
THD	4000	2.50%
SLS	2000	2.25%

上漲排名/股碼	漲跌 (VND)	漲跌%
VLB	5995	13.50%
APF	4450	9.91%
DRI	443	6.24%
PVM	1110	5.69%
LTG	909	3.44%

下跌排名/股碼	漲跌 (VND)	漲跌%
KBC	-2800	-7.00%
ITA	-420	-6.98%
FIT	-850	-6.97%
VIP	-610	-6.93%
ROS	-270	-6.89%

下跌排名/股碼	漲跌 (VND)	漲跌%
TNG	-1700	-8.02%
CEO	-700	-7.29%
IDC	-2700	-6.55%
SHB	-1000	-6.21%
NDN	-1300	-5.94%

下跌排名/股碼	漲跌 (VND)	漲跌%
PXL	-452	-4.48%
C4G	-388	-3.77%
ACV	-2811	-3.76%
SBS	-223	-3.48%
G36	-405	-3.29%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	十億盾
VCB	370,888
VIC	363,611
VHM	326,649
VNM	229,059
BID	168,120

市值排名/股碼	十億盾
THD	56,000
SHB	28,261
VCS	12,752
IDC	12,360
PVS	8,795

市值排名/股碼	十億盾
ACV	162,583
MCH	66,089
VEA	57,674
BSR	34,090
MSR	20,870

交易量排名/股碼	成交值	30 日均
HPG	33,268,400	24,814,439
HAG	30,266,100	16,332,765
FLC	29,496,000	28,467,774
ROS	27,320,900	29,286,948
STB	24,037,300	32,712,709

交易量排名/股碼	成交值	30 日均
SHB	25,766,929	32,612,239
PVS	15,192,147	11,071,683
SHS	9,931,621	6,172,747
KLF	8,930,046	8,567,253
NVB	6,779,930	5,320,499

交易量排名/股碼	成交值	30 日均
BSR	13,854,621	9,830,187
SBS	2,507,950	3,311,304
PAS	1,849,200	936,133
OIL	1,569,760	1,950,308
ABB	1,467,214	1,504,819

資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



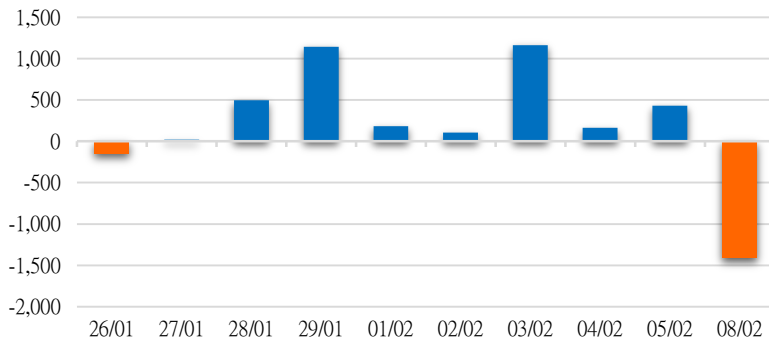
資料源:: FiinPro - YSVN



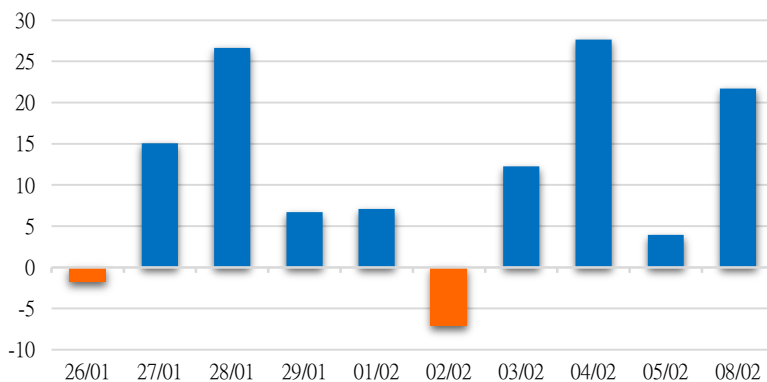
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外資買進賣統計

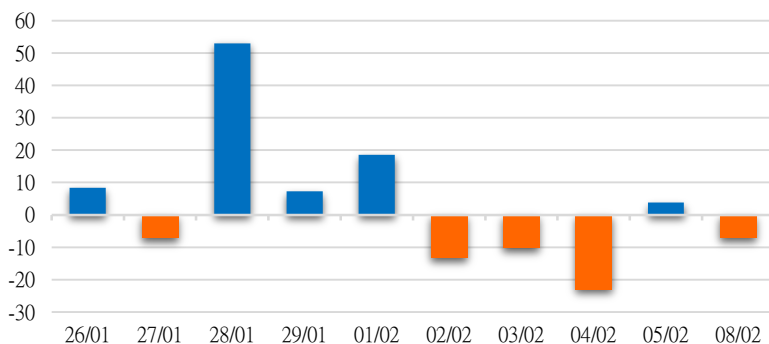
HSX 外資每日買/賣超



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)
FUESSVFL	60,127	HPG	271,172
VJC	32,572	VHM	171,615
FUEVFNND	29,202	VNM	146,093
E1VFN30	28,344	VCB	119,362
LPB	24,342	VRE	106,100

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)
NVB	19,688	BVS	2,183
PVS	2,331	KLF	286
MBS	918	EID	280
APS	637	HHC	222
SHB	545	SHS	212

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	2,518	HAC	128
ACV	1,623	BSR	128
MML	1,105	CTR	112
LTG	836	MFS	19
SBS	763	BVB	17

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



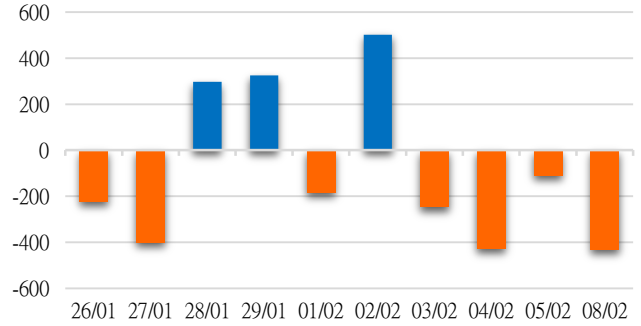
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自營進出統計

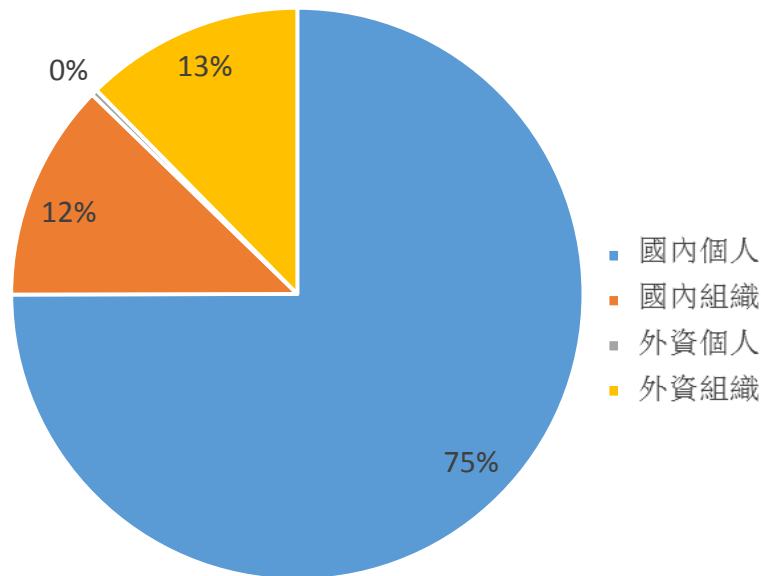
證券代碼	買超金額 (百萬盾)	證券代碼	賣超金額 (百萬盾)
LPB	23,873	FUESSVFL	60,276
GAS	17,624	TCB	53,664
VRE	15,266	VNM	49,070
VGC	13,183	VCB	43,808
PLX	9,517	VIC	37,374

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

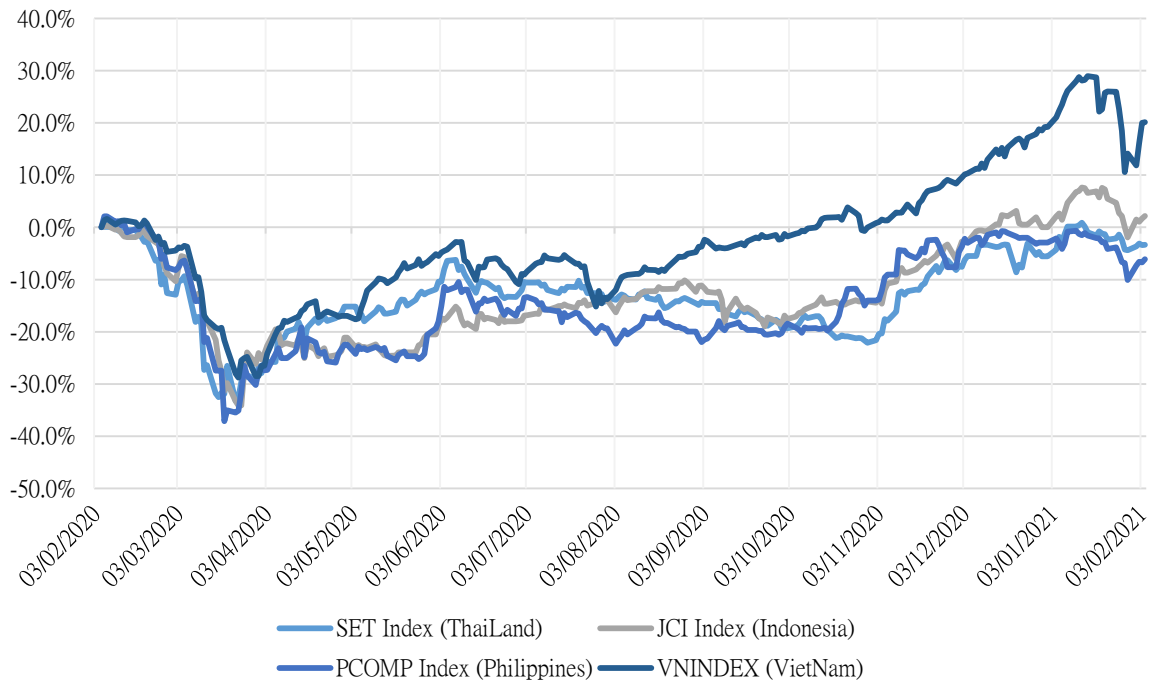


資料源: FinPro - YSVN



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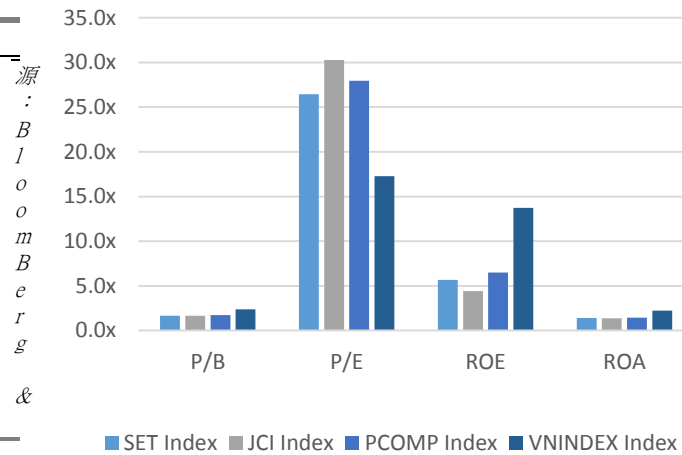
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.7x	1.6x	1.7x	2.3x
P/E		26.7x	30.6x	28.0x	16.6x
ROE	%	5.65	4.35	6.50	13.72
ROA	%	1.41	1.36	1.46	2.23
Vốn hóa	Tỷ USD	551.96	514.51	185.39	183.20
GTGD	Triệu USD	2.32	0.86	0.08	0.45
LS cổ tức	%	2.56	2.26	1.58	1.50

YSVN



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■ SET Index ■ JCI Index ■ PCOMP Index ■ VNINDEX Index



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