當日市場：在農曆年的最後一個交易日中，市場飆升

2021/02/09

市場走勢			
市場指數	**VNI**	**HNI**	**UPCOM**
收盤	1,114.93	224.90	73.81
%日	2.93%	1.88%	1.60%
%週	3.66%	4.43%	3.00%
%月	-4.52%	3.45%	-2.97%
%年	18.52%	114.35%	32.37%
成交值(十億盾)			
當日	12,896	1,315	527
日均量/週	13,887	1,739	711
日均量/月	15,998	2,222	900
外資進出			
買進	1,827.96	13.13	32.90
賣出	2,196.35	30.04	52.05
買賣超	-368.39	-16.91	-19.15
市場漲跌家數			
上漲	179	99	91
下跌	30	25	48
持平	44	118	513
市場指標			
P/E	16.85	14.53	26.55
總市值(兆盾)	4,065	261	998
股息殖利率	2.72%	3.94%	3.94%

資料源: *Bloomberg - YSVN*

VNINDEX

HNXINDEX

市場走勢

世界市場的走勢仍然是積極的，特別是道瓊斯工業平均指數前一晚繼續上漲，有助於穩定越南股市的情緒。指數迅速恢復勢頭，VN-Index 收於 1114.93 點，這也是日內最高水平，上漲了 2.93%。HNX-Index 上漲 1.88%，收於 224.9 點。Upcom-Index 也同步上漲了 1.6%。三大市場的交易價值達到了 13 兆 4,900 億越南盾。

市場穩定的情緒以及低價的需求使許多股票再次上漲。VN30-Index 記錄了 30 檔股票上漲 VPB（+6.9%），REE（+5.6%），VIC（+5.1%），FPT（+4.6%），BVH（+4.4%），CTG（+4%），MBB（+3.6%），MSN（+3.6%）等。

在行業中，糖業（SBT，LSS），證券（VND，VCI，HCM）在過去兩個交易日中均出現了積極的價格走勢。

外資仍然在市場上賣超，價值為 4040 億越南盾。HPG（1200 億），SSI（480 億）和 HDG（360 億）被大量拋售。另一方面，他們積極收購 MSN（320 億），GMD（310 億）和 DGW（250 億）。

市場短期觀點

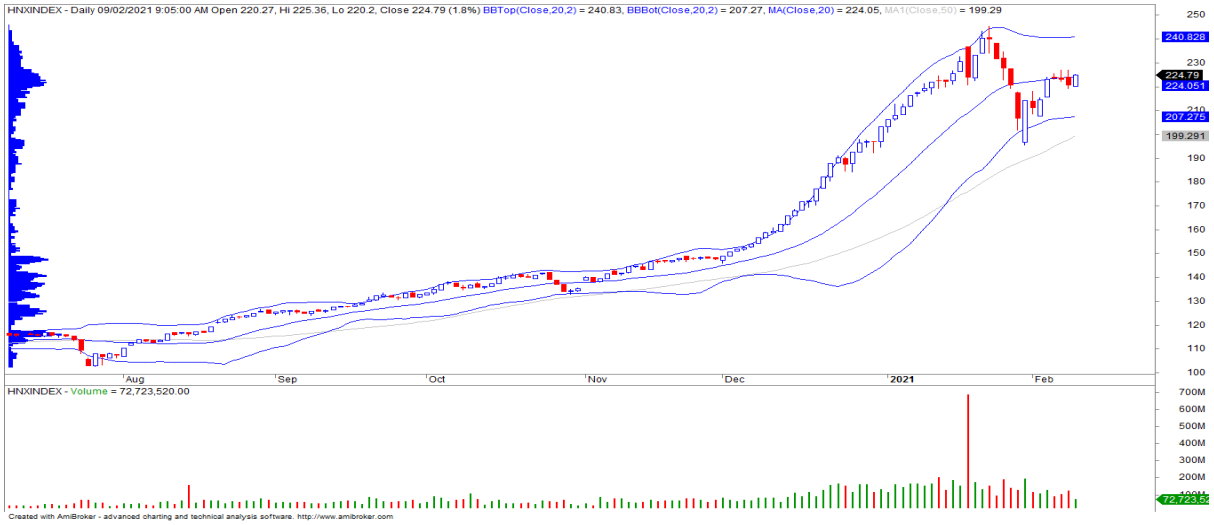
我們認為，市場可能會在今年第一季度保持上漲勢頭，VN-Index 可能會在 20 天移動平均線附近波動。同時，市場繼續進入積累期，因此低流動性的分化水平可能會繼續。不利的是，短期現金流量仍處於較低水平，這表明短期投資者還沒有準備好重返市場，但我們認為，當市場出現分化時，這種現象並不令人擔憂。

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可以繼續利用此修正來增加股票比重，並進行新的投資。

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

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

胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1114.93	2.93%
VN30	1129.49	3.26%
VN Mid	1321.59	2.58%
VN Small	1081.57	2.19%

外資交易	成交值 (十億盾)
買進	1827.96
賣出	2196.35
買超/賣超	-368.39

上漲排名/股碼	漲跌(VND)	漲跌%
GMC	2050	7.00%
EVG	630	6.99%
DXG	1500	6.99%
RIC	1350	6.98%
NHH	5100	6.94%

下跌排名/股碼	漲跌(VND)	漲跌%
FIT	-550	-4.85%
ASM	-650	-4.36%
TIP	-1400	-2.75%
TDP	-500	-1.96%
LHG	-600	-1.83%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	十億盾
VNM	225,715
HPG	138,495
MSN	104,194
NVL	84,052
VJC	67,575

交易量排名/股碼	成交值	30 日均
HPG	26,164,800	25,913,977
SSI	15,890,800	14,538,595
FLC	10,867,800	29,432,668
HQC	10,445,100	21,354,909
DXG	9,518,700	11,087,909

資料源: BloomBerg & Yuanta Research

河內交易所 (HSX)

	收盤	漲跌%
HNI	224.9	1.88%
HN30	336.9	2.30%
VNX AllSh	1079.88	3.07%

外資交易	成交值 (十億盾)
買進	13.13
賣出	30.04
買超/賣超	-16.91

上漲排名/股碼	漲跌 (VND)	漲跌%
S99	1800	9.94%
SHS	1300	5.42%
CEO	400	4.49%
TIG	300	4.23%
TAR	800	4.12%

下跌排名/股碼	漲跌 (VND)	漲跌%
CSC	-600	-2.24%
IDV	-200	-0.35%
HUT	0	0.00%
L14	300	0.47%
VC3	100	0.62%

市值排名/股碼	十億盾
THD	57,925
VCS	12,640
PVI	7,086
SHS	5,244
PHP	5,199

交易量排名/股碼	成交值	30 日均
HUT	5,341,781	10,575,001
SHS	4,240,864	6,492,642
ART	2,549,278	6,711,937
ACM	2,506,110	3,172,154
VIG	1,351,709	3,181,391

資料源: BloomBerg & Yuanta Research

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	73.81	1.60%

外資交易	成交值 (十億盾)
買進	32.90
賣出	52.05
買超/賣超	-19.15

上漲排名/股碼	漲跌 (VND)	漲跌%
LTG	882	3.23%
VTR	1054	3.13%
SGP	336	2.58%
PVM	524	2.54%
NTC	5444	2.37%

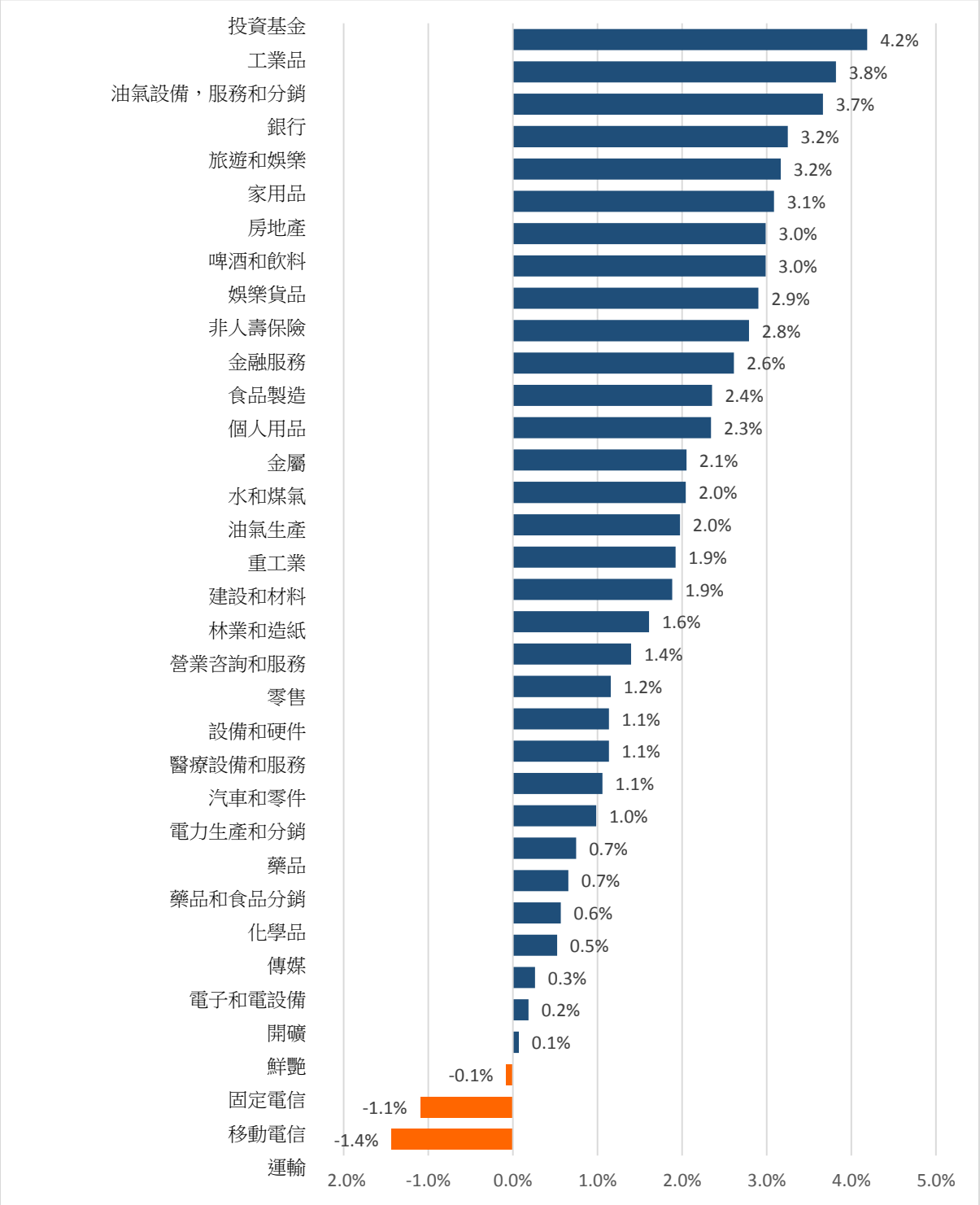
下跌排名/股碼	漲跌 (VND)	漲跌%
MCM	-600	-0.87%
MSR	-19	-0.10%
C4G	20	0.20%
MCH	267	0.29%
HND	92	0.47%

市值排名/股碼	十億盾
MCH	66,178
BSR	34,772
MSR	20,423
MML	16,503
VEF	14,147

交易量排名/股碼	成交值	30 日均
BSR	8,729,550	9,704,824
KSH	2,025,401	2,422,471
QTP	1,970,900	484,542
SBS	1,324,800	3,113,177
AAS	1,199,403	2,472,451

資料源: BloomBerg & Yuanta Research

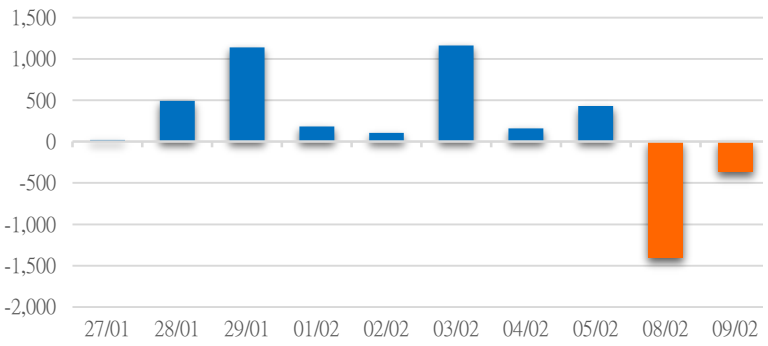
各行業板塊的交易走勢



資料源:: FiinPro - YSVN

外資買進賣統計

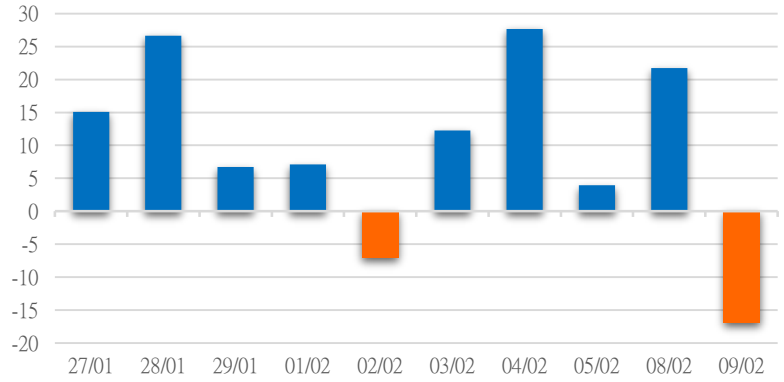
HSX 外資每日買/賣超



證券代碼	買超金額(百萬盾)	證券代碼	賣超金額(百萬盾)
MSN	32,287	HPG	119,927
GMD	31,343	SSI	47,849
DGW	25,334	HDG	36,327
HCM	17,346	NVT	32,580
PDR	17,094	VNM	25,735

HSX 外資買/賣超的前 5 名

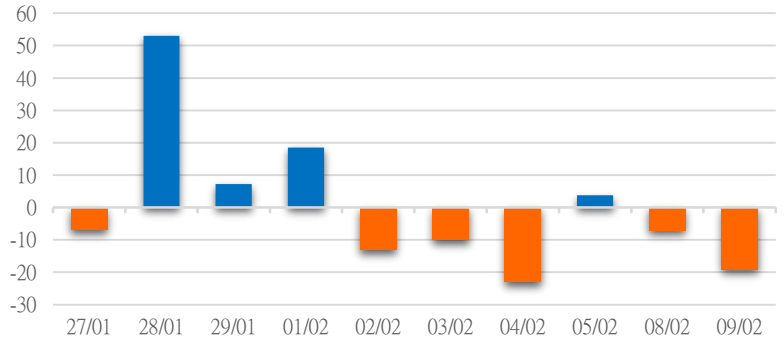
HNX 外資每日買/賣超



證券代碼	買超金額(百萬盾)	證券代碼	賣超金額(百萬盾)
CDN	621	VCS	1,562
MBS	410	IDV	1,393
S99	193	ACM	846
GKM	172	SHS	534
HHG	156	BAX	276

HNX 外資買/賣超的前 5 名

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)
MCH	887	HAC	63
SBS	312	SCL	58
BSR	117	TVU	55
KSH	57	BDG	24
TCW	49	HBH	14

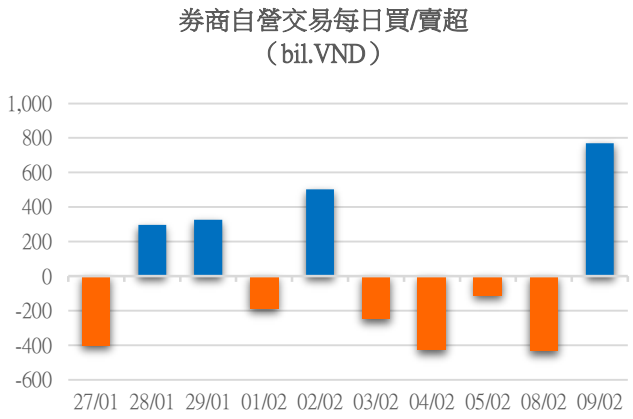
UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

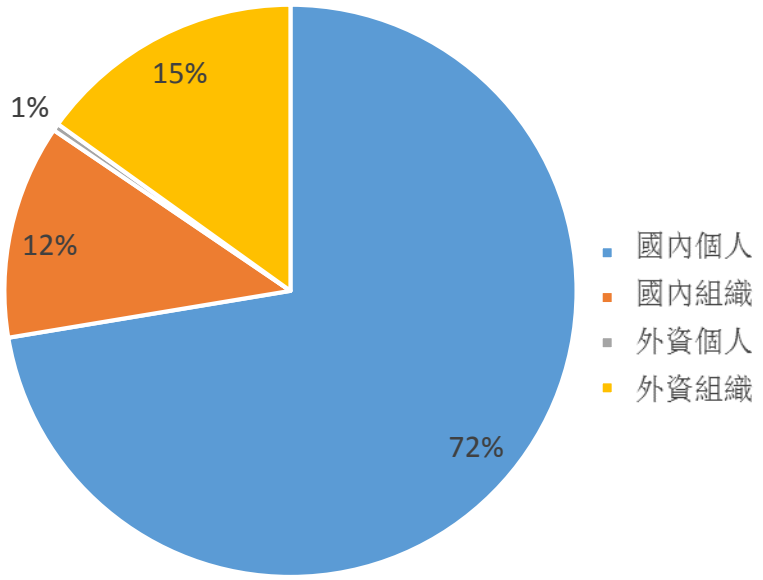
自營進出統計

證券代碼	買超金額(百萬盾)	證券代碼	賣超金額(百萬盾)
VPB	107,366	E1VFVN30	49,344
TCB	77,494	FUEVFVND	27,039
VNM	75,690	DXG	23,421
HPG	72,602	REE	13,268
MBB	55,427	SBT	4,993

券商自營交易最大前名

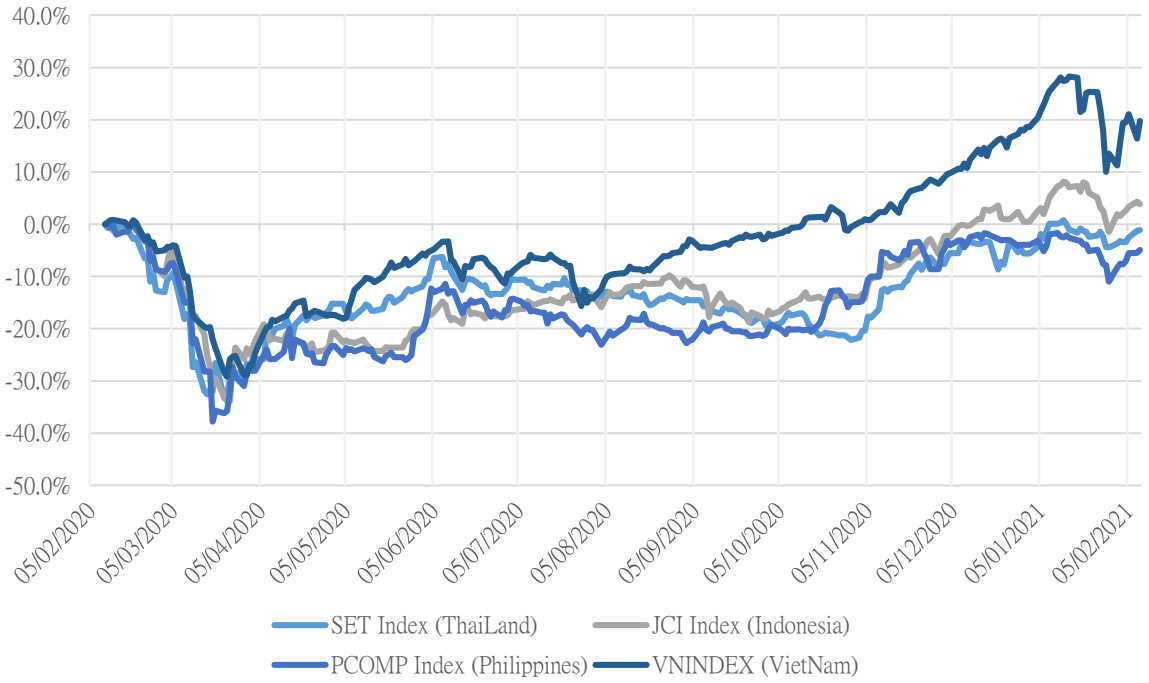


越南證券市場投資人類別統計



資料源: FiinPro – YSVN

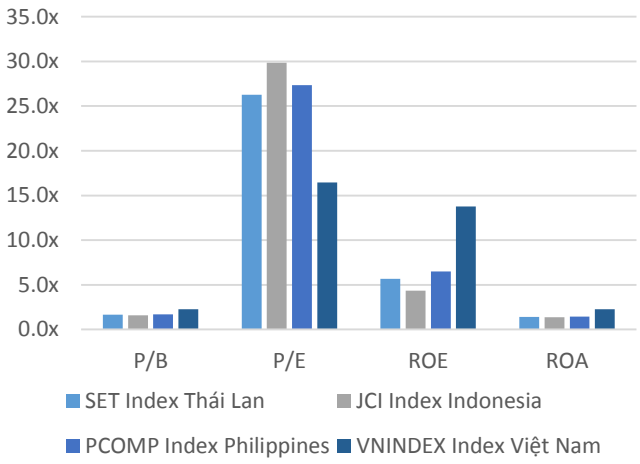
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.7x	1.6x	1.8x	2.3x
P/E		26.7x	30.4x	28.1x	17.1x
ROE	%	5.68	4.36	6.50	13.67
ROA	%	1.42	1.37	1.46	2.22
Vốn hóa	Tỷ USD	560.59	519.55	185.33	176.06
GTGD	Triệu USD	2.80	1.06	0.09	0.66
LS cổ tức	%	2.56	2.27	1.57	1.46

源： BloomBerg & YSVN



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