

## 當日市場：指數強勁上漲，並且流動性保持高位

2021/04/13

### 市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,252.45	295.53	84.10
%日	1.69%	0.59%	1.31%
%週	1.33%	1.47%	1.52%
%月	6.00%	7.89%	4.69%
%年	65.24%	178.33%	66.11%

### 成交值(十億盾)

當日	21,210	3,213	1,255
日均量/週	17,226	3,107	1,250
日均量/月	16,058	2,810	1,246

### 外資進出

買進	1,488.18	196.88	27.33
賣出	1,706.81	25.25	29.80
買賣超	-218.64	171.63	-2.47

### 市場漲跌家數

上漲	225	141	183
下跌	126	97	129
持平	59	132	591

### 市場指標

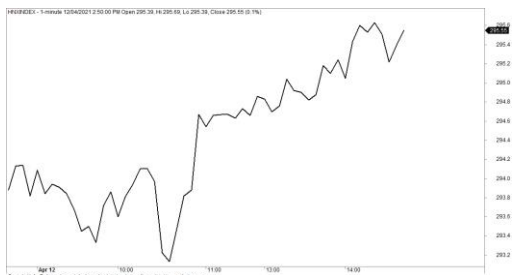
P/E	19.16	19.01	29.46
總市值 (兆盾)	4,646	358	1,103
股息殖利率	2.74%	3.25%	4.23%

資料源: Bloomberg - YSVN

### VNINDEX



### HNIINDEX



### 市場走勢

由於藍籌股表現出積極的走勢，市場錄得強勁的漲幅。這幫助 VN-Index 收盤上漲 1.69，收於 1252.45，這也是該指數的新歷史高點。HNX-Index 上漲 0.59%，收於 295.53 點；Upcom-Index 指數同步上漲 1.31%。三個交易所的交易價值均強勁增長至 29 兆 7,120 億越南盾，比上週增長 67%。

上漲趨勢是由大型股觸發的，例如 VIC (+5.7%)，NVL (+5.9%)，VPB (+3.8%)，HPG (+3.3%)，STB (+3.3%)，SSI (+3.5%)，POW (+3.3%) 等。

除了大型股之外，中型股和仙股也出現了許多新的強勢股，例如 HNG，LDG，HAG，ITA，FIT，VOS，HAC，DLG，HAR，SJF 漲停，SCR (+5.1%)，KBC (+3.8%) 等也上漲良好。

在板塊方面，房地產，銀行，建築材料和證券股當天的表現令人矚目。

外資賣超 490 億越南盾，其中 VPB (970 億)，VCB (910 億) 和 GAS (850 億) 位居榜首。另一方面，他們購買最多的是 VND (1780 億)，VIC (1050 億) 和 STB (950 億)。

### 市場短期觀點

我們認為，市場在下盤中可能會繼續擴大勢頭，VN-Index 將很快重新測試 1,283-1,300 點的範圍。同時，市場仍處於朝著積極方向劇烈波動的階段，其中短期風險仍然很低，現金流沒有顯示出退出市場的跡象。此外，心理指標未顯示任何高風險跡象，因此仍保持樂觀狀態。

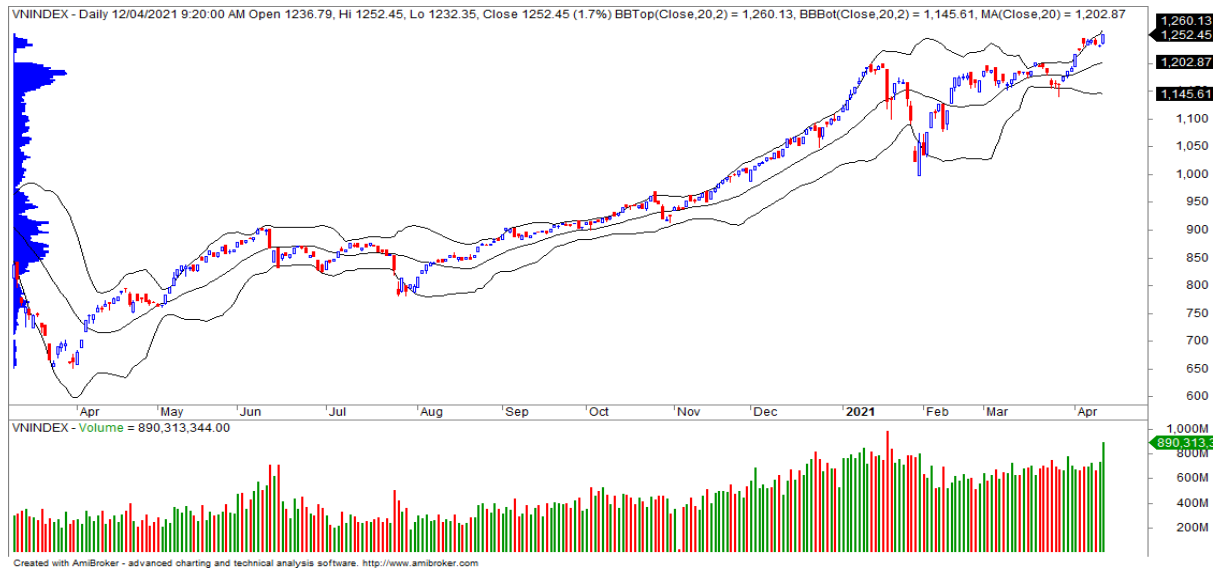
一般市場的短期趨勢仍然為上漲。因此，我們建議短期投資者在投資組合中持有較高比例的股票，並考慮衝浪當前的投資項目或以低權重購買新股票，以防 VN-Index 達到阻力位 1,283-1,300 點時，強烈修正的情況。

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

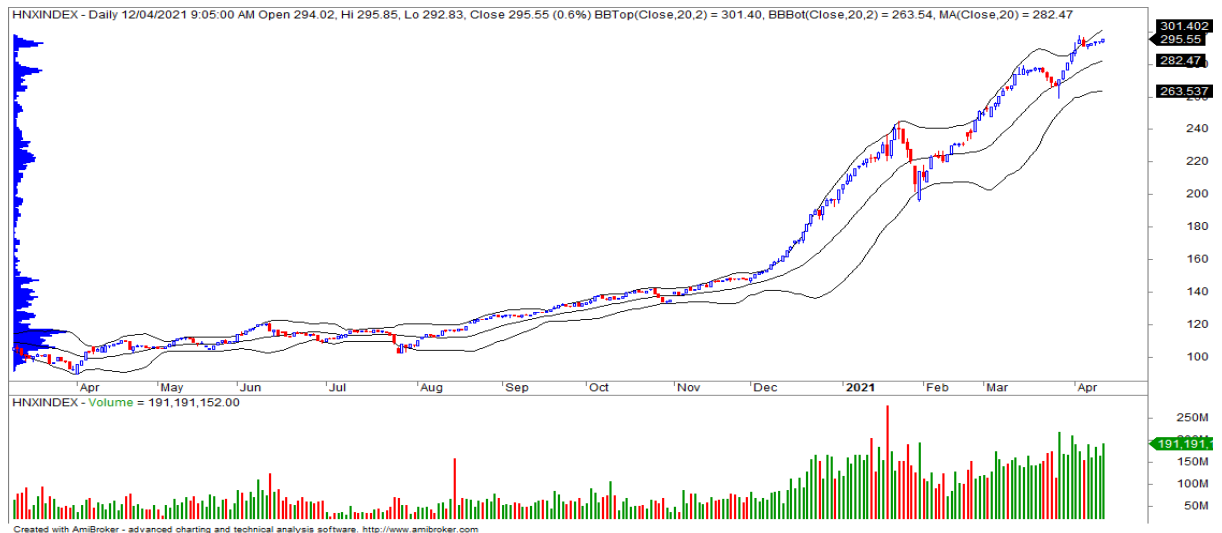


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## 技術分析圖



VN-Index 指數技術分析圖



HNX-Index 指數技術分析圖

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	上漲	1250	1280	1150	970
HNX-Index	上漲	上漲	298	303	196	180
VN30	上漲	上漲	1250	1272	1162	960
VNMidcaps	上漲	上漲	1,430	1500	969	963
VNSmallcaps	上漲	上漲	1235	1280	822	804

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1252.45	1.69%
VN30	1278.19	1.99%
VN Mid	1543.04	1.49%
VN Small	1349.41	1.21%

河內交易所 (HSX)

	收盤	漲跌%
HNI	295.53	0.59%
HN30	451.93	0.83%
VNX AllSh	1234.51	2.00%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	84.1	1.31%

外資交易	成交值 (Bil.VND)
買進	1488.18
賣出	1706.81
買超/賣超	-218.64

外資交易	成交值 (Bil.VND)
買進	196.88
賣出	25.25
買超/賣超	171.63

外資交易	成交值 (Bil.VND)
買進	27.33
賣出	29.80
買超/賣超	-2.47

上漲排名/ 股碼	漲跌 (VND)	漲跌%
HAR	450	7.00%
QCG	680	7.00%
SGT	1100	6.96%
VOS	300	6.96%
LDG	590	6.96%

上漲排名/ 股碼	漲跌(VND)	漲跌%
HJS	3000	9.38%
BII	900	8.74%
KLF	400	8.70%
IVS	800	7.69%
ART	700	6.86%

上漲排名/ 股碼	漲跌(VND)	漲跌%
KLB	2730	11.77%
PGV	1081	6.25%
NAB	1059	6.23%
SBS	453	5.27%
VNB	889	4.25%

下跌排名/ 股碼	漲跌 (VND)	漲跌%
YEG	-2200	-6.97%
ELC	-500	-3.48%
VSC	-1500	-3.05%
LSS	-400	-2.99%
HII	-450	-2.11%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BAX	-10100	-9.02%
IDV	-2900	-3.56%
VC3	-800	-3.56%
WCS	-7200	-3.31%
S99	-600	-2.28%

下跌排名/ 股碼	漲跌(VND)	漲跌%
NDC	-9900	-11.00%
LTG	-936	-2.71%
NTC	-6190	-2.66%
EIN	-395	-2.26%
CTR	-1915	-2.11%

\*註：市值 > 5,000 億越南盾；成交值 > 15 億越南盾

市值排名/ 股碼	Bil.VND
VIC	422,466
VCB	361,616
VHM	325,333
VNM	208,578
BID	178,175

市值排名/ 股碼	Bil.VND
THD	67,900
SHB	44,288
BAB	20,547
VCS	15,088
IDC	11,940

市值排名/ 股碼	Bil.VND
ACV	158,941
MCH	72,719
VEA	59,376
BSR	54,888
MSR	24,077

交易量排 名/股碼	成交值	30 日均
STB	49,783,400	37,467,171
FLC	49,034,600	39,288,100
POW	39,387,800	17,019,386
HAG	27,451,200	8,827,090
HPG	27,110,400	16,603,467

交易量排 名/股碼	成交值	30 日均
ART	18,474,859	8,555,634
KLF	15,775,858	12,978,043
SHB	13,620,806	36,536,322
SHS	11,562,300	9,694,146
VND	11,134,977	9,174,834

交易量排 名/股碼	成交值	30 日均
BSR	13,360,095	14,546,291
ABB	6,079,610	4,198,811
SBS	4,276,767	2,566,720
BVB	2,775,266	2,082,045
AAS	2,607,354	1,902,699

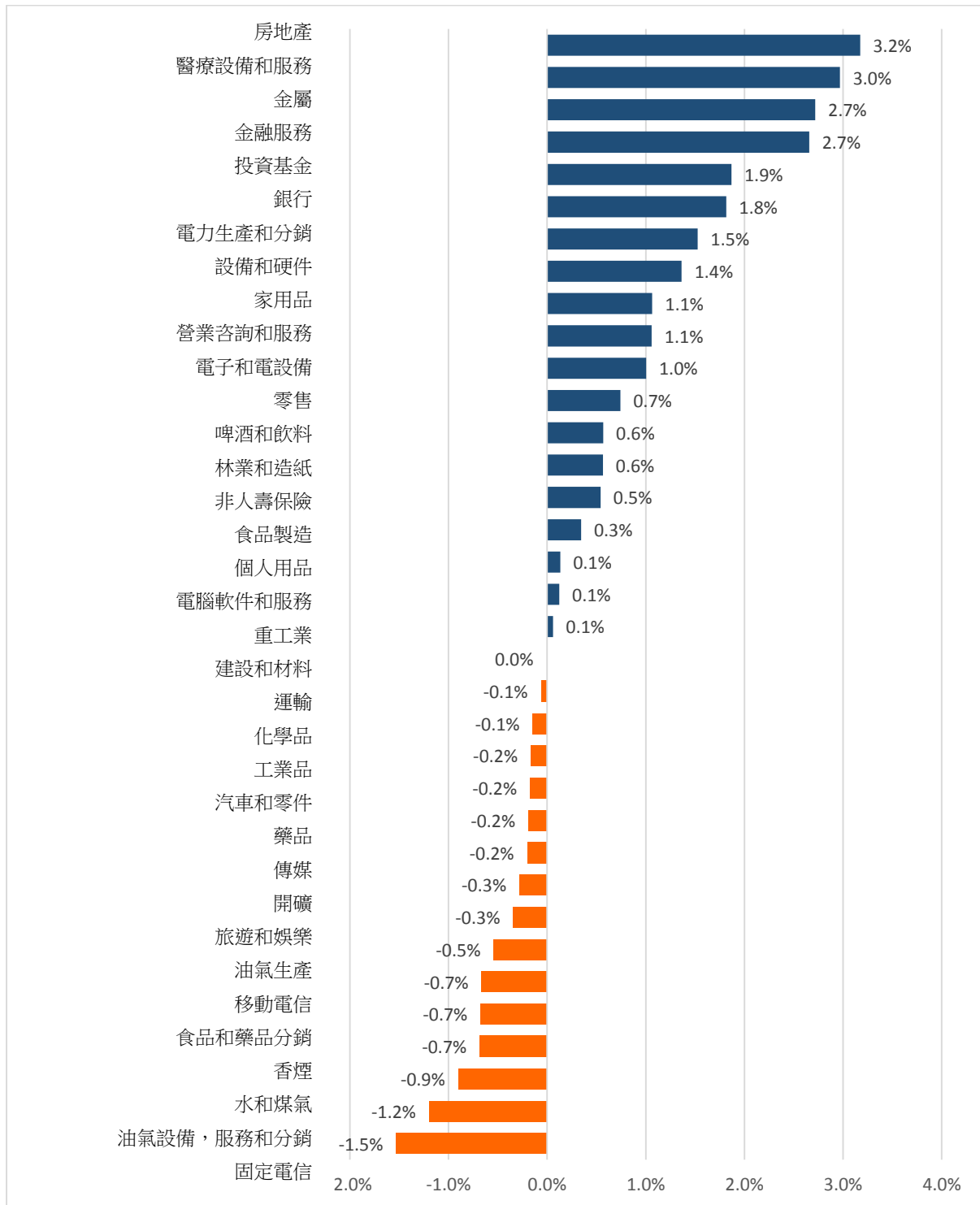
資料源: Bloomberg & Yuanta Research

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## 各行業板塊的交易走勢



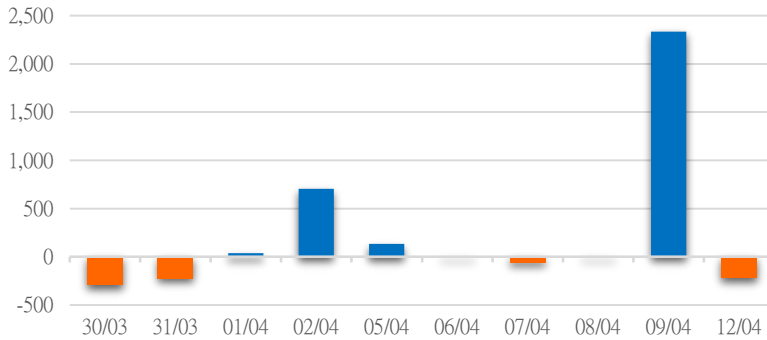
資料源: FiinPro - YSVN



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## 外資買進賣統計

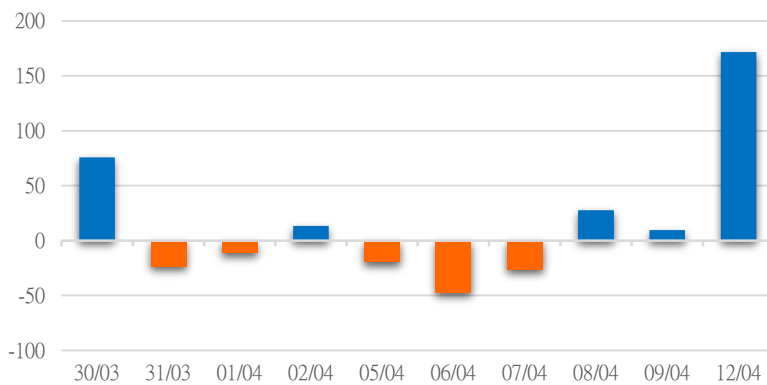
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VIC	104,677	VPB	97,383
STB	94,703	VCB	90,642
NVL	72,725	GAS	85,062
FUEVFNVD	54,956	CTG	77,034
HPG	39,053	VHM	60,161

HSX 外資買/賣超的前 5 名

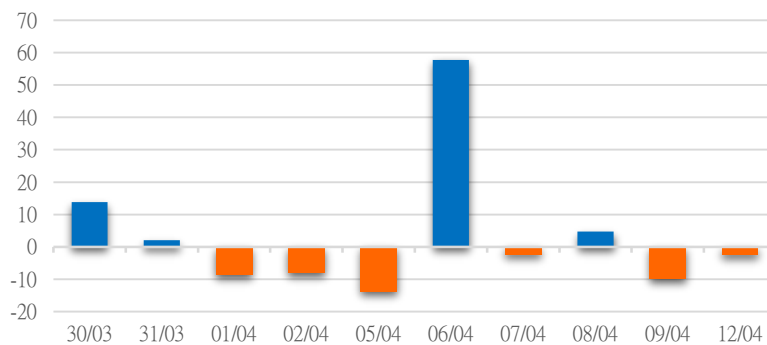
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VND	178,267	APS	9,383
VCS	3,801	WCS	1,543
SHS	2,257	IVS	1,286
IDV	1,203	BVS	921
NVB	759	HUT	795

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 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
QNS	6,895	ACV	7,432
MCH	3,489	LTG	2,687
HPP	2,664	VEA	645
AMS	785	CTR	555
MML	699	GHC	319

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



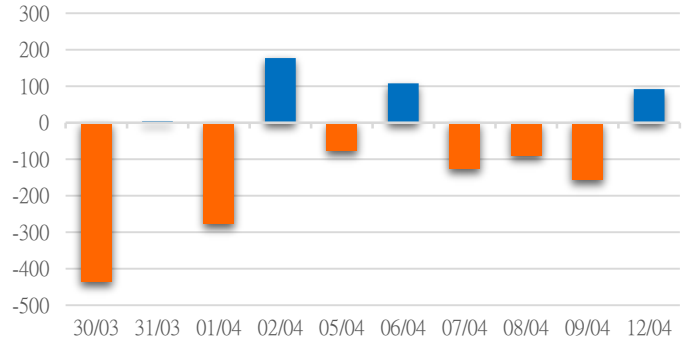
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### 自營進出統計

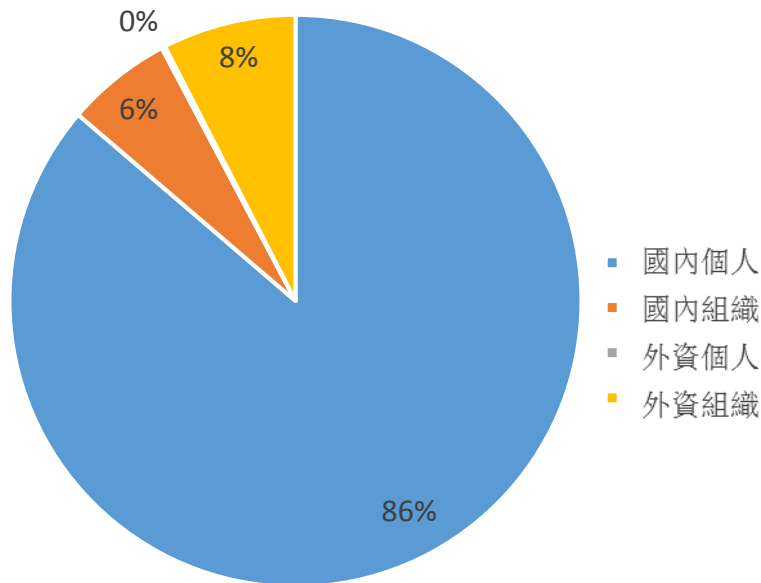
證券代碼	買超金額 (百萬盾)	證券代碼	賣超金額 (百萬盾)
VIC	39,307	FUEVFNND	54,082
HPG	36,369	KBC	20,605
HSG	27,308	POW	19,312
TCB	24,753	VRE	12,194
VNM	19,159	DIG	12,126

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

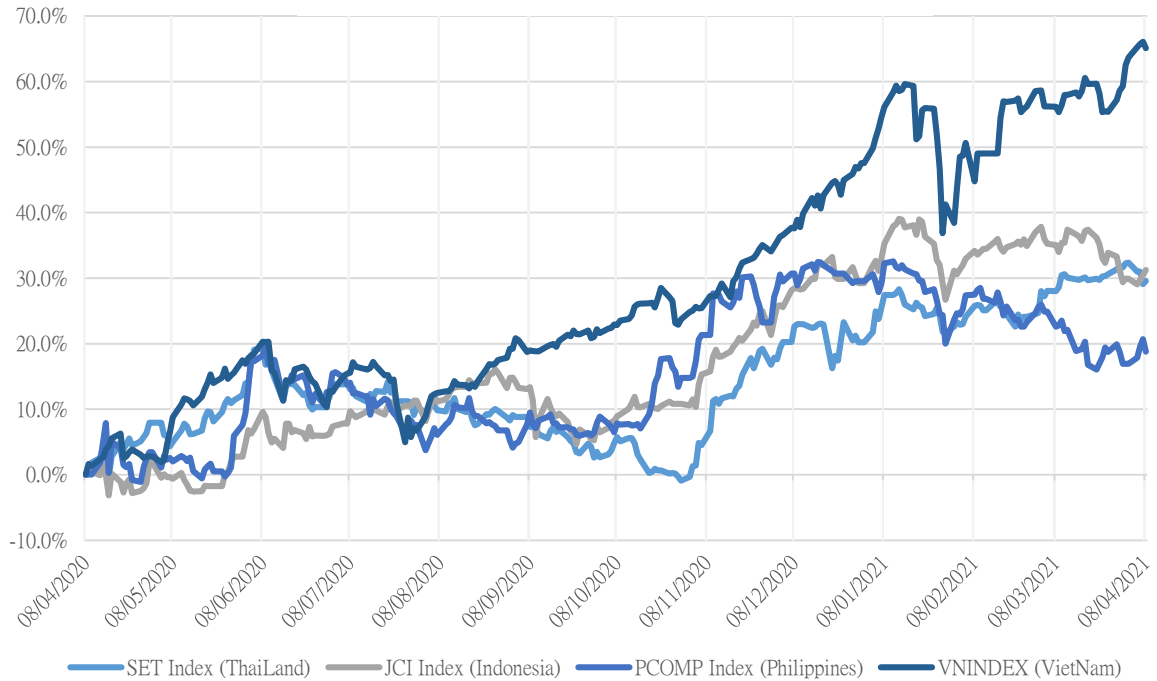


資料源: FinPro - YSVN



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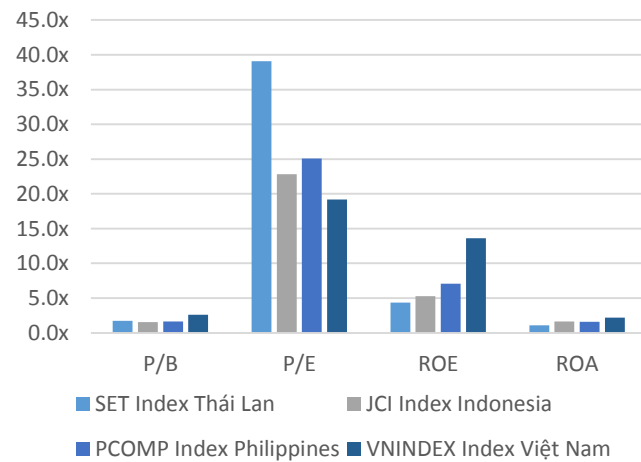
### 東南亞主要市場走勢比較



### 東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.7x	1.5x	1.6x	2.6x
P/E		38.7x	22.8x	25.0x	19.4x
ROE	%	4.35	5.20	7.08	13.61
ROA	%	1.09	1.63	1.59	2.19
Vốn hóa	Bil.USD	562.88	489.07	171.52	200.18
GTGD	Bil.USD	2.29	0.66	0.06	0.61
LS cổ tức	%	2.51	2.08	1.79	1.28

源：Bloomberg & YSVN





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