

## 當日市場：下跌趨勢顯示降溫的跡象

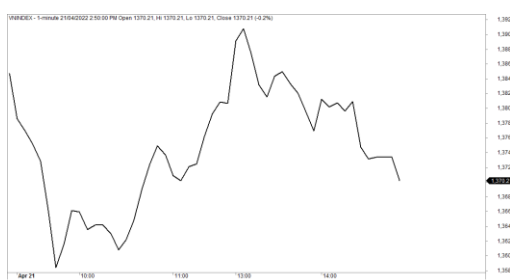
2022/04/22

### 市場走勢

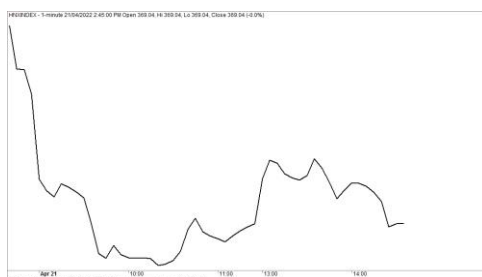
市場指數	VNI	HNI	UPCOM
收盤	1,370.21	366.61	104.89
%日	-1.05%	-3.53%	-1.42%
%週	-6.92%	-13.47%	-7.51%
%月	-8.34%	-20.00%	-9.72%
%年	8.04%	23.65%	28.34%
<b>成交值(Bil.VND)</b>			
當日	23,761	2,616	1,729
日均量/週	22,901	2,441	1,430
日均量/月	24,723	3,221	1,781
<b>外資進出</b>			
買進	2,406.63	19.89	25.85
賣出	1,469.60	37.40	26.09
買賣超	937.03	-17.51	-0.25
<b>市場漲跌家數</b>			
上漲	98	47	79
下跌	276	189	279
持平	51	118	545
<b>市場指標</b>			
P/E	16.00	18.82	22.37
總市值 (兆盾)	5,521	435	1,431
股息殖利 <sup>2</sup>	2.05%	4.08%	4.01%

資料源: Bloomberg - YSVN

### VNINDEX



### HNIINDEX



### 市場走勢

盤初出現強勁跌勢，隨後指數明顯收窄。VN-Index 下跌 1.05%，收於 1370.21 點，HNX-Index 下跌 3.53%，Upcom-Index 下跌 1.42%。3 大市場的交易額為 25 兆 5,690 億越南盾。

VN30-Index 比主要指數波動收窄，跌幅為 0.6%，顯示大型股繼續分化。金融股繼續支撐市場，如 BVH (+3.9%)、CTG (+1%)、TCB (+1.3%)、BID (+1.4%)、SSI (+2.4%)。相反，Vingroup 股票 (VHM, VIC) 以及 VJC (-3.9%)、GVR (-6.3%)、KDH (-3.8%)、NVL (-1.6%) 等均大幅下跌。

一些股票錄得強勁的需求和恢復，如 GEX (+4.7%)、VND (+6.8%)、VCG (+3.6%)。

外資繼續買超超過 9,190 億越南盾。VRE (710 億)、VNM (570 億)、NLG (490 億) 在買超方面領先。相反，VHM (640 億)、DPM (600 億)、CII (510 億) 被拋售最多的股票。

### 市場短期觀點

我們認為當 VN-Index 形成短期反轉信號並在 1350 點的短期支撐位附近交易時，市場可能會重回上漲趨勢。同時，情緒指標繼續大幅下跌至過度悲觀區域，因此短期投資者在現階段需要限制拋售，因為市場可能很快建立短期底部或很快出現技術恢復。此外，VNMidcaps 和 VNSmallcaps 下跌至 200 日均線，並在未來 1-2 個交易日顯示恢復的跡象，並在未來幾個交易日賣壓可能會減少。

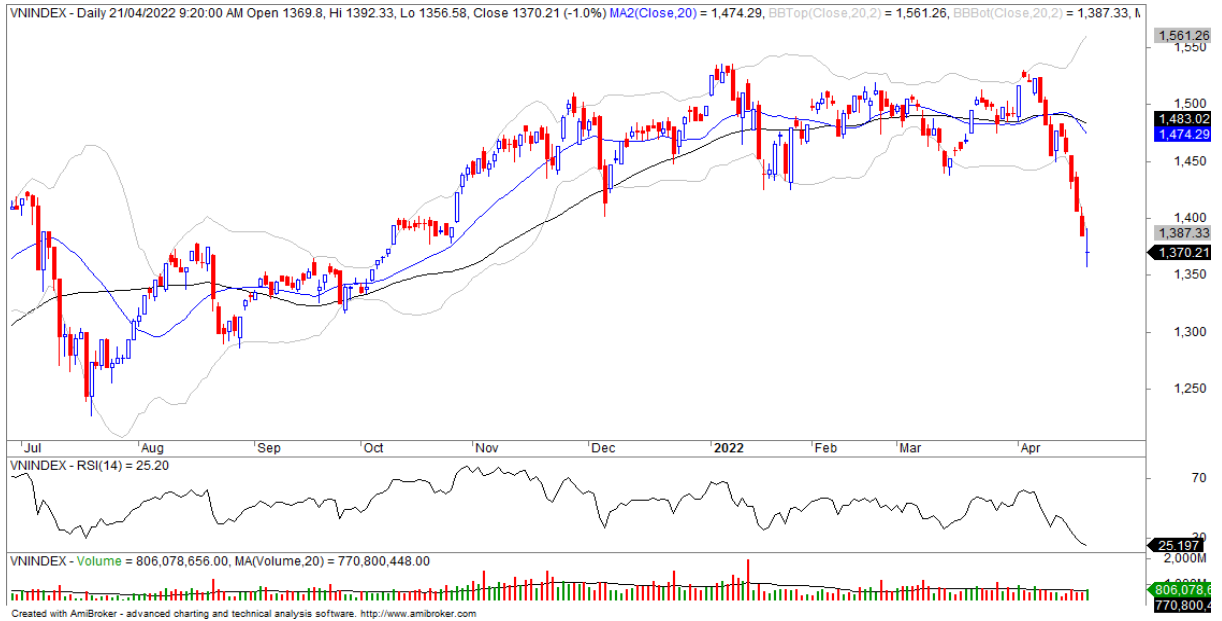
大盤短期走勢仍為下跌。因此，我們建議短期投資者在盤中大幅下跌時限制拋售，仍優先將保證金轉低以避免被券商拋售。同時，短期投資者可以繼續觀察，並等待更明顯的反轉跡象。

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	下跌	上漲	1500	1530	1210	970
HNX-Index	下跌	上漲	470	500	300	180
VN30	下跌	上漲	1550	1570	1445	960
VNMidcaps	下跌	上漲	1,730	1800	1650	963
VNSmallcaps	下跌	上漲	1430	1450	1400	804



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1370.21	-1.05%
VN30	1426.87	-0.60%
VN Mid	1914.24	-0.72%
VN Small	1850.75	-2.58%

河內交易所 (HSX)

	收盤	漲跌%
HNI	366.61	-3.53%
HN30	658.07	-4.05%
VNX AllSh	1410.68	-0.86%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	104.89	-1.42%

外資交易	成交值 (Bil.VND)
買進	2406.63
賣出	1469.6
買超/賣超	937.03

外資交易	成交值 (Bil.VND)
買進	19.89
賣出	37.40
買超/賣超	-17.51

外資交易	成交值 (Bil.VND)
買進	25.85
賣出	26.09
買超/賣超	-0.25

上漲排名/股碼	漲跌(VND)	漲跌%
ACL	2150	6.94%
MIG	1950	6.90%
TTF	800	6.78%
VND	2050	6.77%
DRH	1050	6.62%

上漲排名/股碼	漲跌(VND)	漲跌%
HUT	2200	8.87%
MBS	1400	4.65%
HVT	3000	4.26%
PVI	2100	3.95%
PSD	1000	2.29%

上漲排名/股碼	漲跌(VND)	漲跌%
HTG	2278	3.59%
GEE	578	1.70%
CSI	746	1.03%
QNS	260	0.54%
QTP	99	0.54%

下跌排名/股碼	漲跌(VND)	漲跌%
DC4	-1050	-7.00%
KBC	-3150	-7.00%
PET	-4200	-7.00%
HTN	-3300	-7.00%
TDC	-1200	-7.00%

下跌排名/股碼	漲跌(VND)	漲跌%
CEO	-4700	-10.00%
L14	-24600	-10.00%
VC7	-1400	-10.00%
L18	-4400	-9.98%
CSC	-8200	-9.94%

下跌排名/股碼	漲跌(VND)	漲跌%
DDV	-3233	-14.50%
BOT	-1673	-13.94%
PVM	-2350	-12.84%
DRI	-2105	-12.31%
G36	-1666	-11.73%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	Bil.VND
VCB	371,029
VIC	302,445
VHM	290,872
GAS	204,027
HPG	193,230

市值排名/股碼	Bil.VND
THD	48,475
KSF	32,250
NVB	22,105
VCS	18,176
IDC	17,820

市值排名/股碼	Bil.VND
ACV	200,195
MCH	79,906
BSR	75,516
VEA	67,221
MVN	38,995

交易量排名/股碼	成交值	30 日均
SHB	30,722,600	9,216,732
HDB	27,968,827	3,769,086
HAG	23,914,100	22,834,559
ITA	22,077,300	13,097,059
GEX	20,350,700	17,997,427

交易量排名/股碼	成交值	30 日均
PVS	16,186,215	8,135,675
SHS	10,524,065	5,013,547
HUT	9,571,796	5,470,892
KLF	6,069,700	7,795,117
IDC	6,038,775	5,985,919

交易量排名/股碼	成交值	30 日均
VHG	11,003,898	6,322,072
BSR	9,745,407	5,906,407
VGT	5,183,141	3,820,063
SBS	3,906,342	2,412,998
C4G	3,679,330	3,605,553

資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



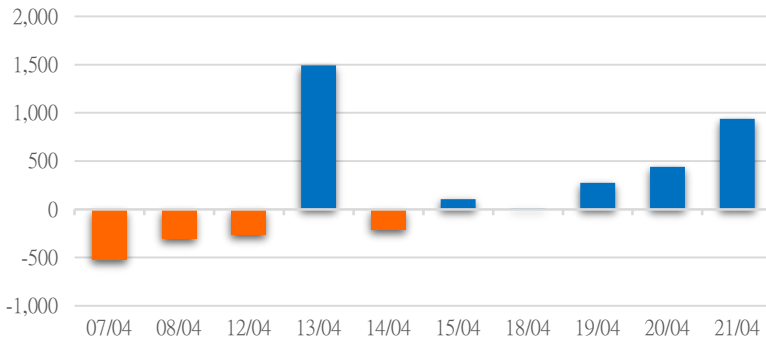
資料源:: FiinPro - YSVN



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## 外資買進賣統計

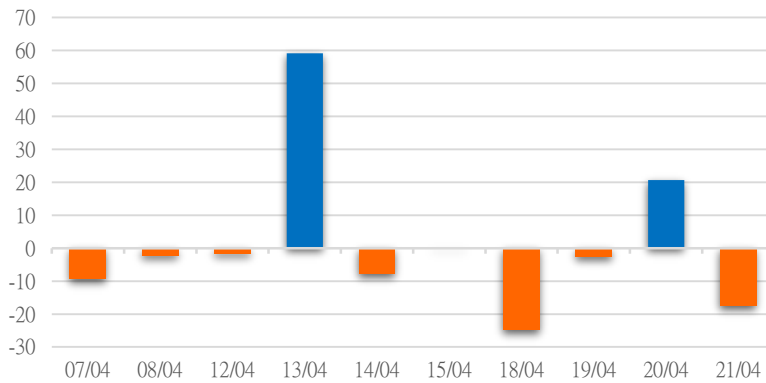
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VRE	71,176	VHM	63,597
VNM	56,698	DPM	60,486
NLG	48,623	CII	51,120
MSN	46,966	OCB	33,538
DXG	44,654	HPG	22,763

HSX 外資買/賣超的前 5 名

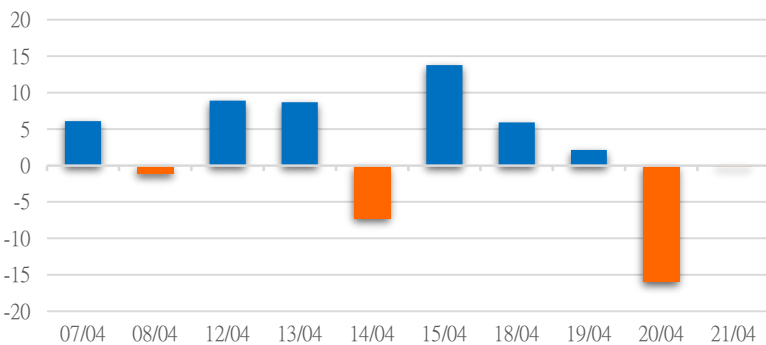
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVI	3,488	VCS	7,411
DL1	1,075	SHS	7,155
BCC	653	PMC	2,640
PLC	630	PVS	2,265
TA9	605	PVC	2,077

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	7,255	MCH	8,316
CLX	1,913	VEA	4,257
LTG	1,393	NTC	1,239
ACV	350	CSI	866
MML	266	SIP	228

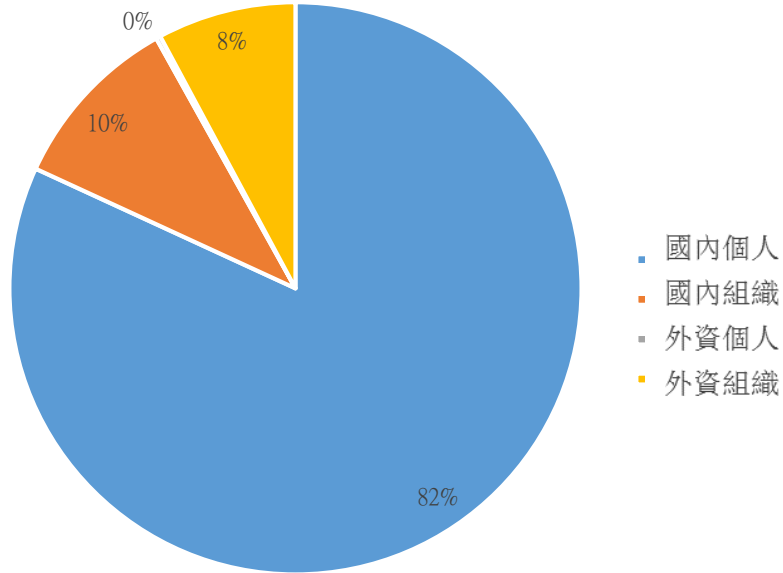
UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



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### 越南證券市場投資人類別統計

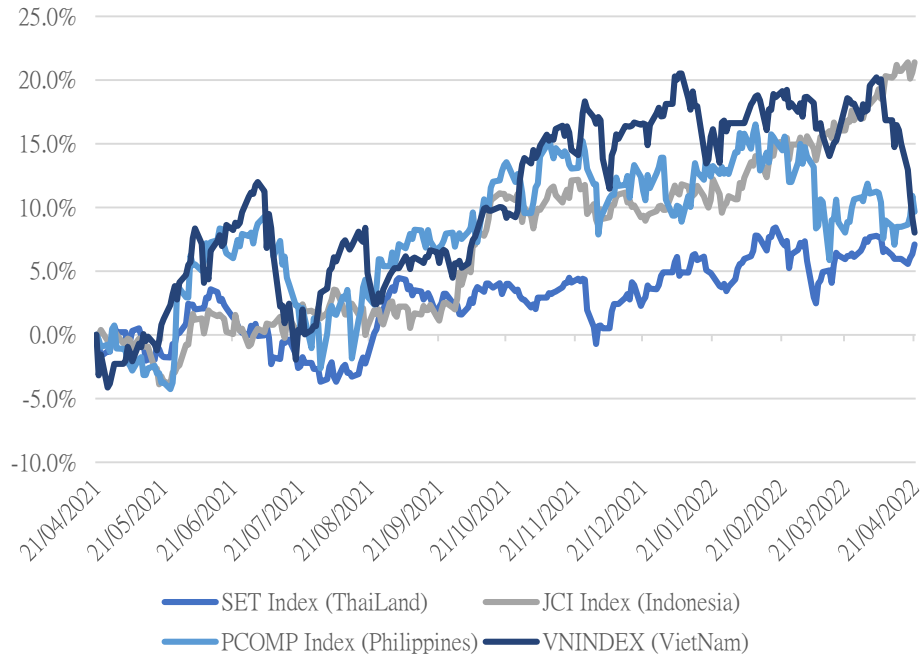


資料源: FiinPro - YSVN



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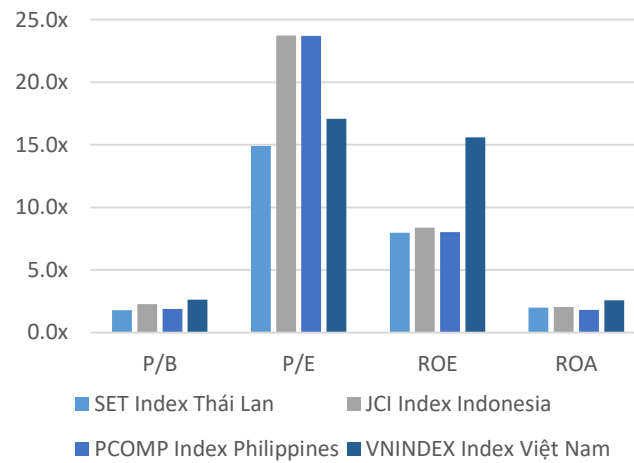
### 東南亞主要市場走勢比較



### 東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.7x	2.2x	1.7x	2.4x
P/E		18.4x	22.10	20.8x	15.6x
ROE	%	9.61	9.63	8.86	15.66
ROA	%	2.40	2.45	2.02	2.56
Vốn hóa	Tỷ USD	584.03	657.50	188.62	239.01
GTGD	Triệu USD	1.82	1.35	0.07	0.84
LS cổ tức	%	2.64	2.04	1.73	1.21

源：BloomBerg & YSVN





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