

## 當日市場：市場的指數逆轉上漲

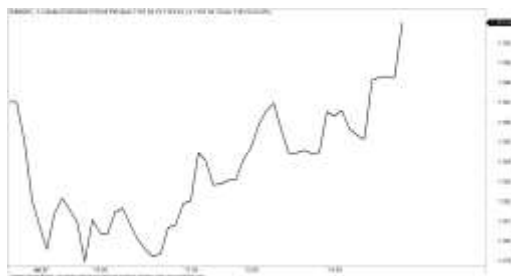
2022/07/28

### 市場走勢

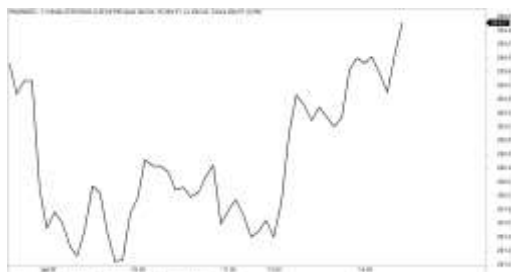
市場指數	VNI	HNI	UPCOM
收盤	1,191.04	284.52	88.87
%日	0.50%	0.58%	0.52%
%週	-0.26%	-1.51%	-0.01%
%月	-0.98%	1.46%	0.83%
%年	-6.73%	-7.02%	4.84%
<b>成交值(Bil.VND)</b>			
當日	10,013	925	561
日均量/週	10,464	1,217	740
日均量/月	11,465	1,237	872
<b>外資進出</b>			
買進	1,249.30	3.62	8.64
賣出	629.48	2.77	4.25
買賣超	619.82	0.85	4.38
<b>市場漲跌家數</b>			
上漲	191	100	130
下跌	136	80	156
持平	93	170	617
<b>市場指標</b>			
P/E	12.45	14.35	15.19
總市值 (兆盾)	4,739	334	1,217
股息殖利率	1.42%	3.89%	4.95%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



### 市場走勢

市場在交易日的大部分時間下跌後，市場在尾盤時逆轉上漲。VN-Index 收於 1,191.04 點，上漲 0.5%，HNX-Index 上漲 0.58%，Upcom-Index 上漲 0.52%。3 大市場的交易額達到 9 兆 3,220 億越南盾。

當日引領指數上漲的催化劑是銀行股和房地產股。具體而言，VCB (+1.5%)、LPB (+4.1%)、BVH (+5.1%)、DXG (+6.2%)、SCR (+5.8%)、GVR (+1.5%) 等；另一方面，由於許多股票錄得負面的 2022 年第二季度業務業績，鋼鐵股繼續面臨下跌壓力。

此外，中小型股也大幅上漲，VNMID Index 和 VNSML Index 分別上漲 1.08% 和 0.69%。

外資在當日買超超過 6,250 億越南盾。KDC (6,200 億)、MWG (410 億)、LPB (280 億) 在買超方面領先。另一方面，HPG (1,660 億)、NKG (190 億)、越南盾 (120 億) 被拋售最多的股票。

### 市場短期觀點

我們認為市場可能會上漲，VN-Index 在下個交易日重新測試 1,204 點的阻力位。同時，市場仍處於短期調整階段，但我們認為在未來 1-2 個交易日，市場可能會快速結束該調整階段。此外，短期情緒指標繼續小幅下跌，顯示投資者對當前走勢仍持謹慎的情緒。積極點是，短期現金流已出現流入大型股的跡象，但在未來幾個交易日需要更多關注該走勢。

大盤短期走勢仍為中性。因此，我們建議短期投資者可以在當前水平繼續持有股票比例，並不應買進新股。

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	中性	下跌	1393	1500	1310	1200
HNX-Index	下跌	下跌	470	500	300	180
VN30	下跌	下跌	1550	1570	1445	960
VNMidcaps	上漲	下跌	1,730	1800	1650	963
VNSmallcaps	下跌	下跌	1430	1450	1400	804

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1191.04	0.50%
VN30	1219.43	0.08%
VN Mid	1621.87	1.08%
VN Small	1454.57	0.69%

河內交易所 (HSX)

	收盤	漲跌%
HNI	284.52	0.58%
HN30	510.87	0.74%
VNX AllSh	1195.19	0.39%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	88.87	0.52%

外資交易	成交值 (BiL.VND)
買進	1249.3
賣出	629.48
買超/賣超	619.82

外資交易	成交值 (BiL.VND)
買進	3.62
賣出	2.77
買超/賣超	0.85

外資交易	成交值 (BiL.VND)
買進	8.64
賣出	4.25
買超/賣超	4.38

上漲排名/ 股碼	漲跌(VND)	漲跌%
VGC	3900	6.94%
BSI	1750	6.82%
VNS	950	6.67%
HDC	2750	6.43%
CKG	1200	6.35%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PVI	3500	8.05%
PLC	1200	4.86%
HUT	1100	3.83%
DL1	200	3.51%
MBS	700	3.37%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DGT	1862	13.02%
TID	2521	6.32%
IDP	9367	5.76%
DDV	860	4.78%
SIP	3131	2.77%

下跌排名/ 股碼	漲跌(VND)	漲跌%
CTF	-1500	-6.90%
TEG	-400	-4.57%
HAH	-2200	-3.30%
ROS	-80	-2.73%
AMD	-60	-1.92%

下跌排名/ 股碼	漲跌(VND)	漲跌%
NTP	-1500	-3.69%
KLF	-100	-3.13%
PVC	-200	-1.25%
HTP	-400	-1.07%
DDG	-300	-0.77%

下跌排名/ 股碼	漲跌(VND)	漲跌%
VLC	-551	-2.73%
VHG	-89	-2.34%
PAT	-3251	-1.99%
BSR	-324	-1.32%
APF	-837	-1.26%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VCB	349,733
VHM	255,601
VIC	252,101
GAS	200,391
BID	179,831

市值排名/ 股碼	BiL.VND
KSF	25,050
THD	19,495
IDC	19,338
NVB	16,036
BAB	13,502

市值排名/ 股碼	BiL.VND
ACV	185,903
BSR	76,179
MCH	67,707
VEA	58,271
GE2	30,853

交易量排名/ 股碼	成交值	30 日均
HPG	28,715,987	18,754,677
VND	18,093,040	23,457,900
SSI	17,854,700	17,456,327
LPB	14,349,400	7,930,182
HAG	13,171,500	20,424,877

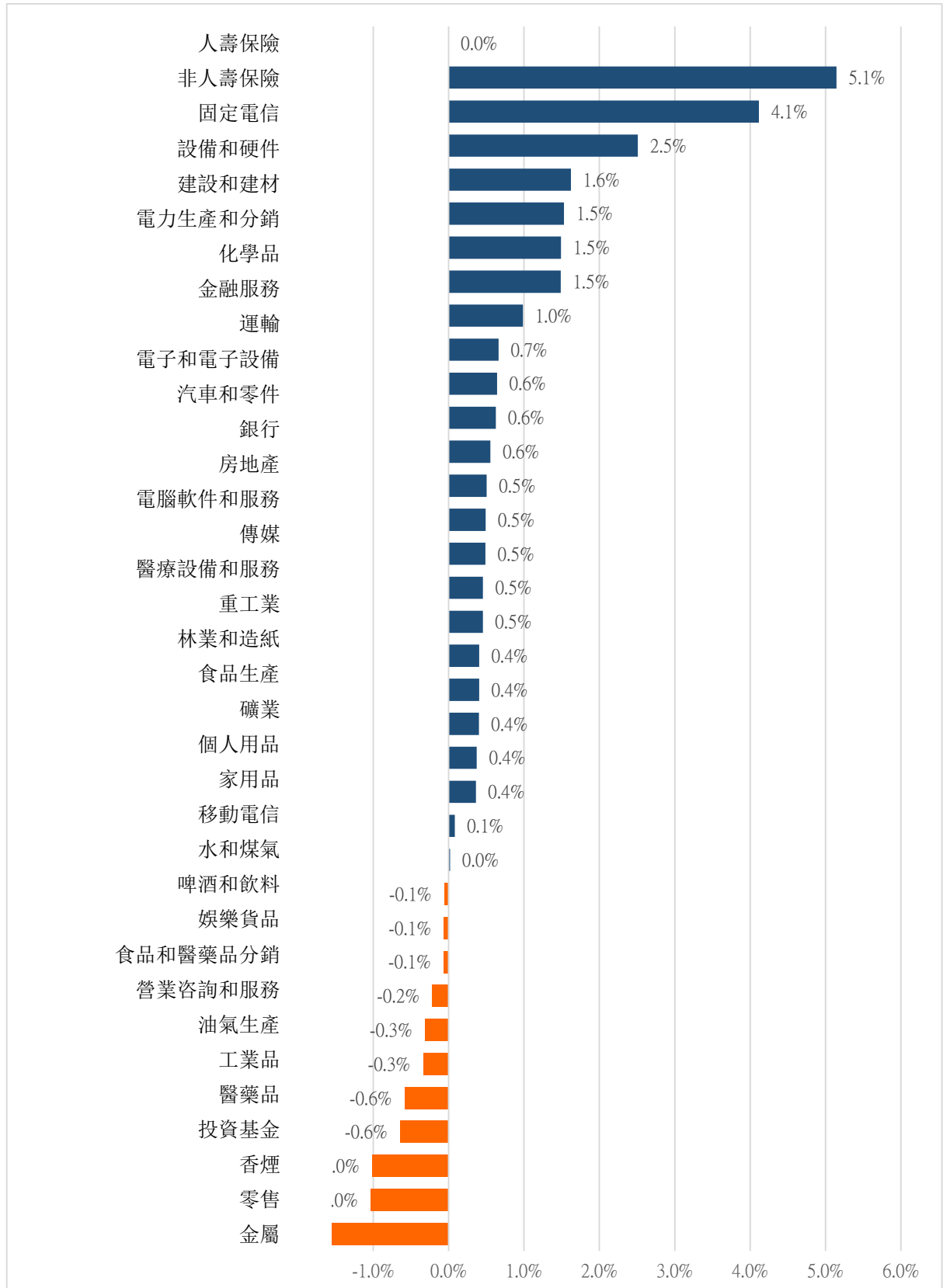
交易量排名/ 股碼	成交值	30 日均
SHS	9,565,659	9,540,949
HUT	4,508,987	3,291,857
CEO	3,949,108	5,408,470
PVS	2,966,919	6,633,648
AMV	2,669,608	1,079,348

交易量排 名/股碼	成交值	30 日均
BSR	4,296,517	12,222,010
DDV	3,254,740	537,429
ABB	1,984,296	1,450,016
NAB	1,829,391	53,500
AFX	1,741,100	23,964

資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



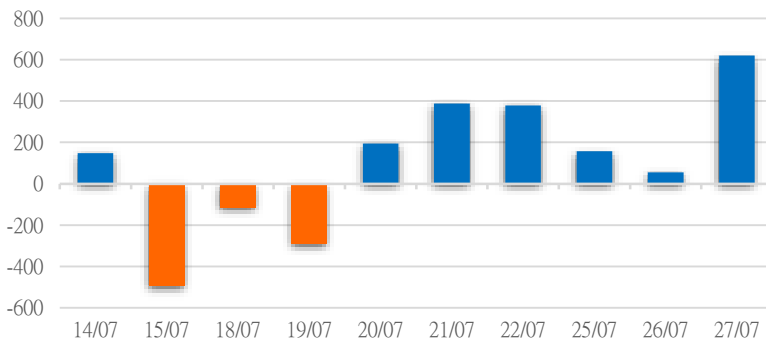
資料源: FiinPro - YSVN



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## 外資買進賣統計

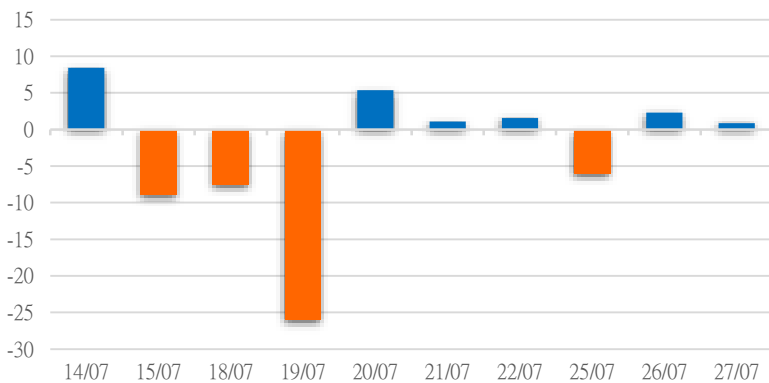
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
KDC	619,612	HPG	166,232
MWG	40,792	NKG	19,106
LPB	28,321	VND	12,419
SSI	26,083	VHC	6,780
VCB	17,618	PLX	5,950

HSX 外資買/賣超的前 5 名

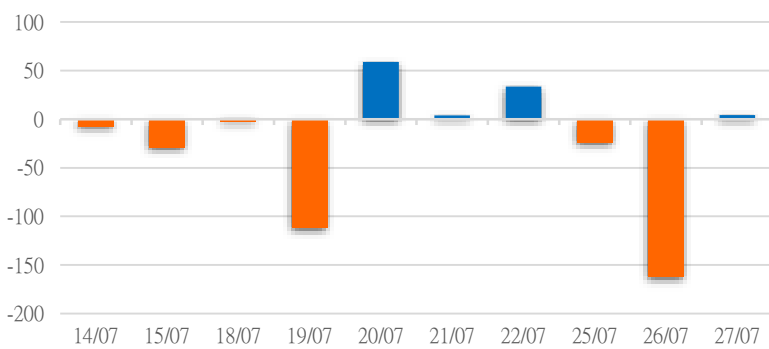
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVI	1,858	HUT	569
BCC	147	IDC	356
ICG	113	NTP	350
PVS	112	MCF	261
PVG	100	TNG	239

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)
LTG	3,162	VEA	2,177
ACV	1,737	CSI	839
MPC	1,141	BSR	340
VGG	416	BTD	61
AAS	354	ACG	46

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

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## 自營統計

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
STB	15,233	SZC	8,735
VPB	12,980	E1VFN30	751
VIC	12,978	GEG	419
FPT	12,868	FUEVN100	240
VHM	12,274	FUESSVFL	112

HSX 自營交易最大前名

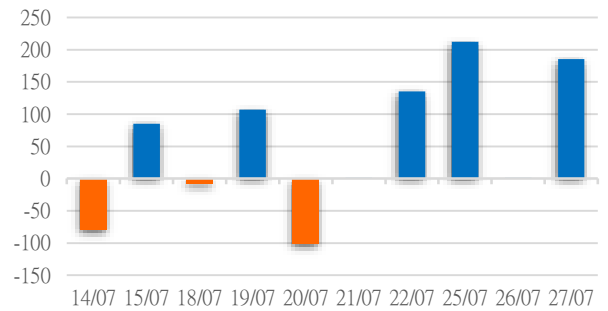
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
CEO	296.00	TDT	0
DL1	0.13		

HNX 自營交易最大前名

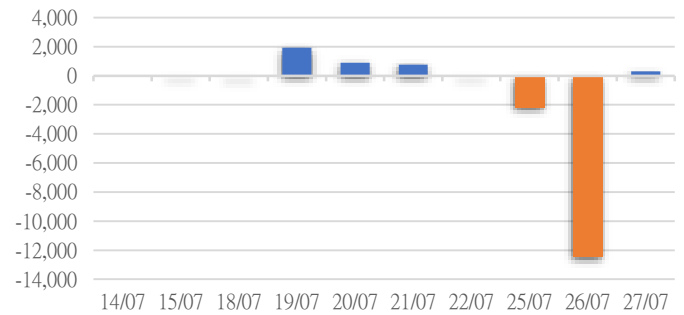
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
AFX	25,500	VLC	0
VTP	2,112	PXS	0
		VHG	0
		VAB	0

UPCoM 自營交易最大前名

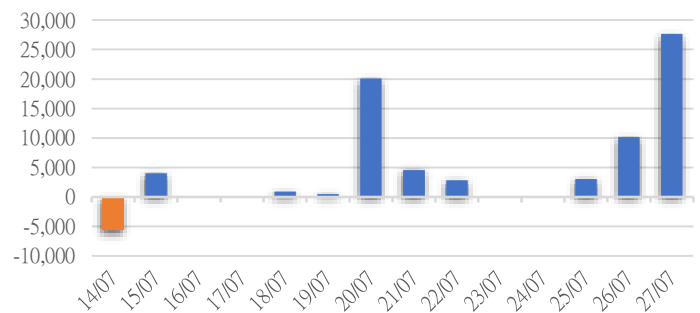
HSX 自營交易每日買/賣超  
( Bil.VND )



HNX 自營交易每日買/賣超  
( Mil.VND )



UPCoM 自營交易每日買/賣超  
( Mil.VND )

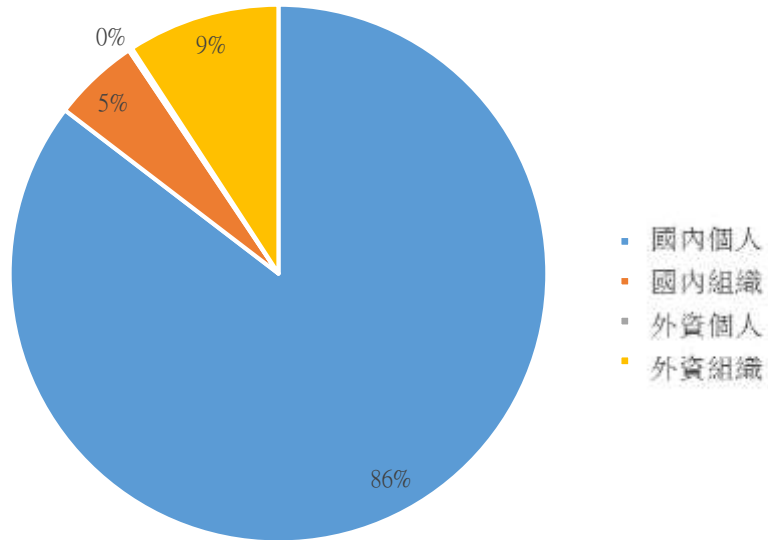






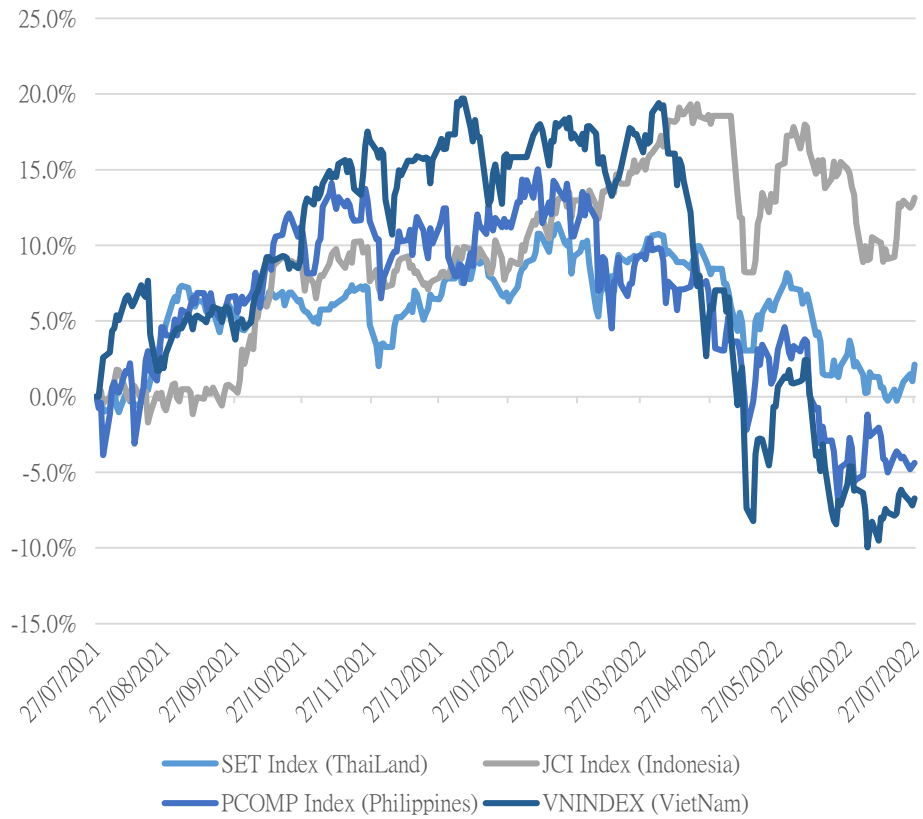
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### 越南證券市場投資人類別統計



資料源: FiinPro - YSVN

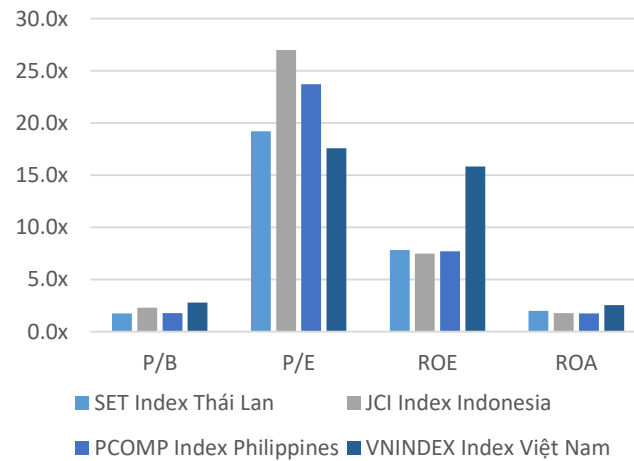
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.1x	2.1x	1.5x	2.0x
P/E		16.7x	15.60	17.8x	12.6x
ROE	%	9.16	12.97	8.95	15.96
ROA	%	2.32	3.28	2.03	2.61
Vốn hóa	Tỷ USD	510.78	601.14	157.55	202.08
GTGD	Triệu USD	1.14	0.54	0.05	0.37
LS cổ tức	%	2.82	2.61	2.07	1.59

源: Bloomberg & YSVN







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