

## 當日市場：市場在尾盤調整

2022/08/19

### 市場走勢

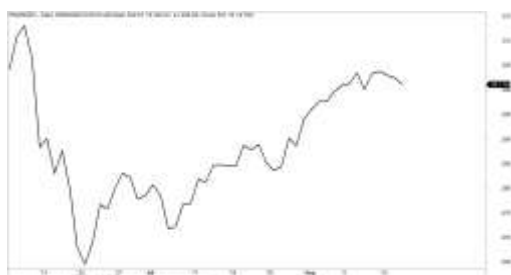
市場指數	VNI	HNI	UPCOM
收盤	1,273.66	301.19	92.85
%日	-0.13%	-0.46%	-0.24%
%週	1.49%	-0.31%	-0.04%
%月	8.14%	6.40%	6.58%
%年	-6.44%	-11.81%	-1.20%
<b>成交值(Bil.VND)</b>			
當日	15,315	1,457	847
日均量/週	15,976	1,808	1,023
日均量/月	14,279	1,631	952
<b>外資進出</b>			
買進	1,196.60	24.15	7.46
賣出	1,076.44	9.89	30.07
買賣超	120.16	14.26	-22.61
<b>市場漲跌家數</b>			
上漲	94	79	123
下跌	245	107	195
持平	82	163	585
<b>市場指標</b>			
P/E	13.54	15.52	15.21
總市值 (兆盾)	5,101	357	1,281
股息殖利率	1.38%	3.30%	3.72%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



## 市場走勢

市場情緒在期貨合約到期時謹慎的情況下，市場的指數繼續處於漲跌交替的階段。VN-Index 收於 1,273.66 點，下跌 0.13%，HNX-Index 下跌 0.46%，Upcom-Index 下跌 0.24%。3 大市場的交易額均超過 15 兆 9,880 億越南盾。

市場在早盤上漲，但在尾盤反轉下跌。盤中的漲幅由 GAS (+1.2%)、VNM (+1.2%)、VIC (+1.2%) 等大支柱股引領，但在午盤時被顯著收窄。另一方面，BID、CTG、NVL、POW 在 VN30-Index 中領跌，跌幅為 1-2%。

證券股在當日吸引了現金流，如 SSI (+2%)、HCM (+4.8%)、VND (+0.9%)、SHS (+0.7%) 在兩個交易所的交易量領先。

外資回歸買超近 1,120 億越南盾。VNM (1,160 億)、SSI (880 億)、HDB (680 億) 在買超方面領先。另一方面，VHM (1,030 億)、DGC (490 億)、KBC (440 億) 被拋售最多的股票。

## 市場短期觀點

我們認為市場在下個交易日可能會繼續調整，VN-Index 可能仍會在 1,260 - 1,285 點處於震盪階段。同時，我們認為市場在未來幾個交易日的調整壓力可能逐漸加大，VN-Index 可能重新測試 1,250 點的支撐位。此外，情緒指標持續下跌，顯示短期投資者對當前的走勢仍持謹慎情緒。

大盤短期走勢仍為上漲。因此，我們建議短期投資者可以在投資組合中繼續持有高比例的股票，並在現階段限制新買。

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

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1273.66	-0.13%
VN30	1299.93	-0.04%
VN Mid	1727.93	-0.46%
VN Small	1575.79	-0.42%

河內交易所 (HSX)

	收盤	漲跌%
HNI	301.19	-0.46%
HN30	555.24	-0.46%
VNX AllSh	1275.42	-0.19%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	92.85	-0.24%

外資交易	成交值 (BiL.VND)
買進	1196.6
賣出	1076.44
買超/賣超	120.16

外資交易	成交值 (BiL.VND)
買進	24.15
賣出	9.89
買超/賣超	14.26

外資交易	成交值 (BiL.VND)
買進	7.46
賣出	30.07
買超/賣超	-22.61

上漲排名/ 股碼	漲跌(VND)	漲跌%
BSI	2000	6.78%
VNS	900	5.33%
HCM	1300	4.81%
CSV	2200	4.75%
CKG	950	4.36%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PSI	400	4.55%
MBS	400	2.01%
APS	300	1.76%
BVS	400	1.72%
PVS	300	1.18%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DSC	1171	3.54%
QNS	1116	2.49%
SSH	1792	2.19%
BMS	248	2.14%
CSI	1125	1.30%

下跌排名/ 股碼	漲跌(VND)	漲跌%
FLC	-370	-6.95%
ADS	-1300	-6.50%
PTL	-340	-5.40%
AAT	-550	-4.31%
VPG	-1200	-3.96%

下跌排名/ 股碼	漲跌(VND)	漲跌%
KSF	-5600	-6.29%
VC2	-1400	-6.01%
MST	-400	-4.35%
HTP	-1700	-4.14%
NDN	-300	-2.54%

下跌排名/ 股碼	漲跌(VND)	漲跌%
VHG	-157	-3.65%
C4G	-361	-2.65%
CLX	-498	-2.54%
DRI	-282	-2.31%
PXL	-201	-1.97%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VCB	385,700
VHM	266,923
VIC	256,678
GAS	215,128
BID	202,341

市值排名/ 股碼	BiL.VND
KSF	26,700
IDC	21,450
THD	20,790
NVB	15,423
BAB	13,584

市值排名/ 股碼	BiL.VND
ACV	193,261
BSR	75,568
MCH	72,884
VEA	61,041
MVN	34,732

交易量排名/ 股碼	成交值	30 日均
SSI	28,626,400	20,319,691
HPG	23,768,100	30,920,113
VND	22,423,200	22,943,509
HAG	21,608,300	22,943,748
SHB	18,366,900	14,077,365

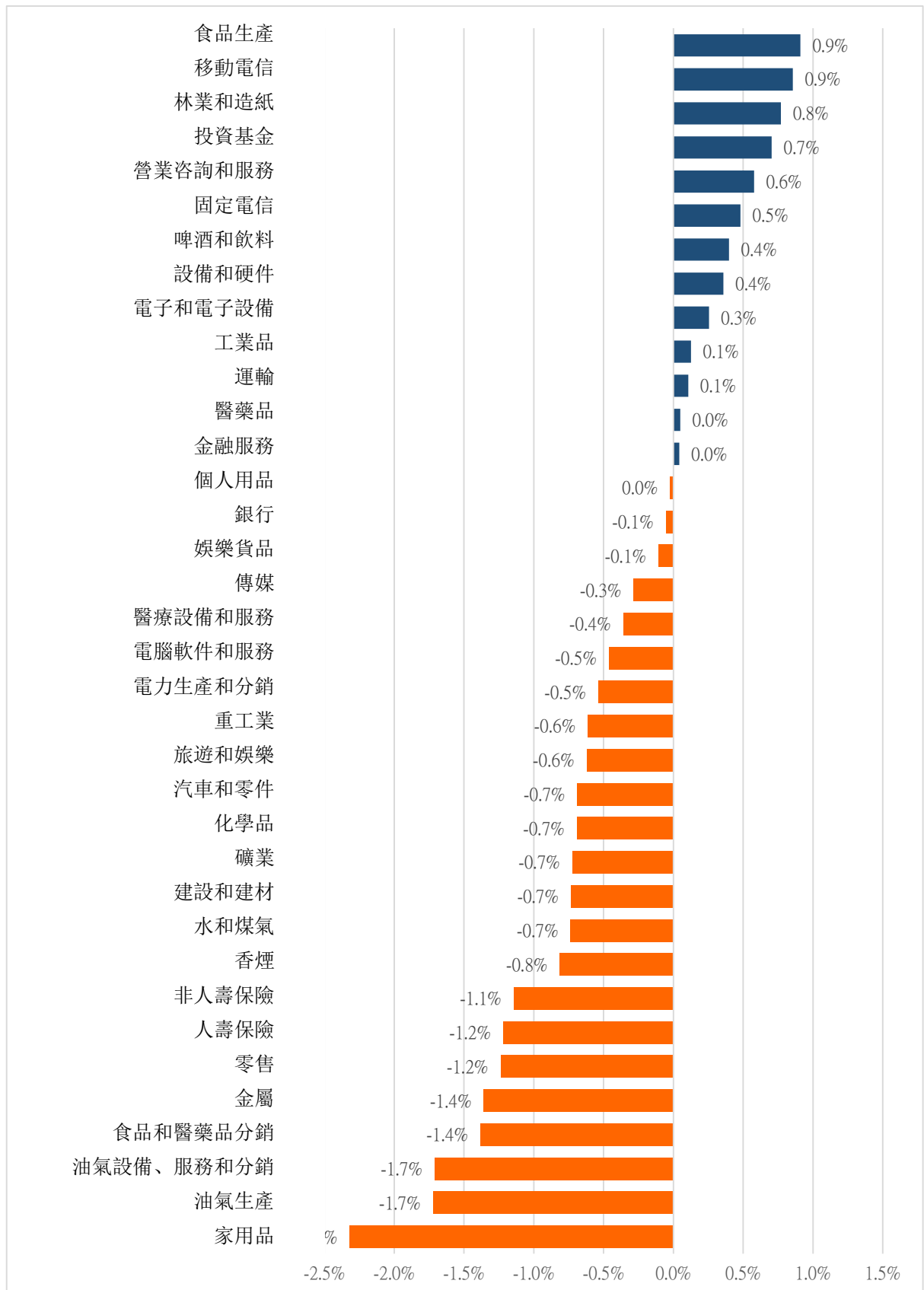
交易量排名/ 股碼	成交值	30 日均
SHS	17,637,541	13,726,270
PVS	8,246,066	7,289,449
HUT	4,745,716	4,329,792
CEO	4,266,731	6,533,849
TNG	2,274,663	2,179,982

交易量排 名/股碼	成交值	30 日均
KLB	6,929,807	11,074
BSR	5,713,422	10,733,968
VHG	2,588,900	2,688,984
QNS	2,565,976	290,301
SBS	2,475,111	2,750,606

資料源: Bloomberg & Yuanta Research

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## 各行業板塊的交易走勢



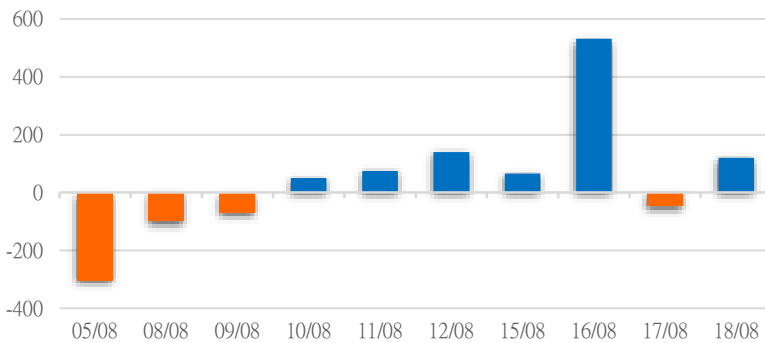
資料源: FiinPro - YSVN



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## 外資買進賣統計

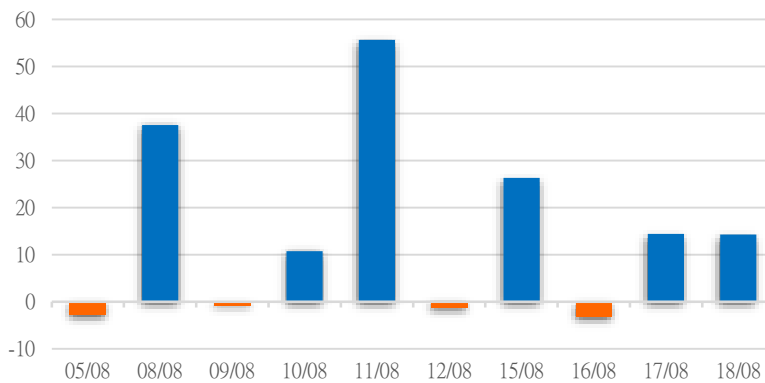
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VNM	115,892	VHM	102,760
SSI	88,156	DGC	48,987
HDB	69,009	KBC	44,173
VND	53,063	VJC	40,743
STB	47,423	HPG	27,010

HSX 外資買/賣超的前 5 名

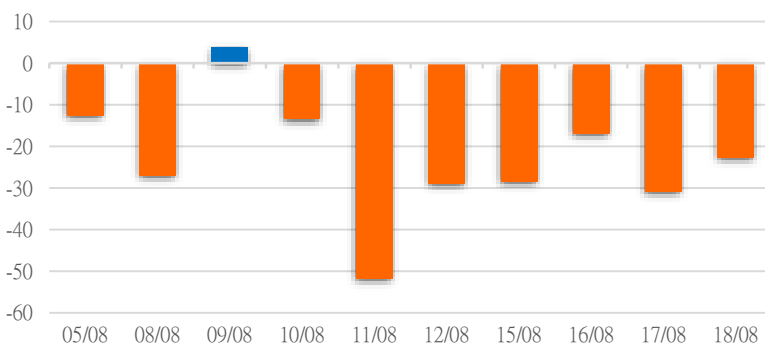
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	21,560	TNG	4,185
PCG	824	IDC	3,711
TVD	78	IDJ	219
PPP	76	IVS	121
ONE	60	NRC	95

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)
ACV	2,131	BSR	24,990
MPC	914	VEA	1,663
CSI	432	QNS	230
MCH	280	TTD	161
MML	242	IFS	115

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)
NKG	32,111	VNM	28,932
VND	20,555	HPG	25,909
VPB	16,113	STB	13,449
E1VFN30	7,511	VHM	11,084
SSI	7,027	MBB	10,663

HSX 自營交易最大前名

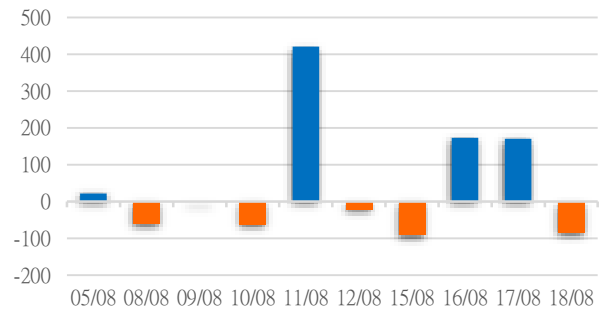
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TNG	2.65	PVS	1,295
CTB	1.44		
TVD	0.76		
TV4	0.55		
BVS	0.42		

HNX 自營交易最大前名

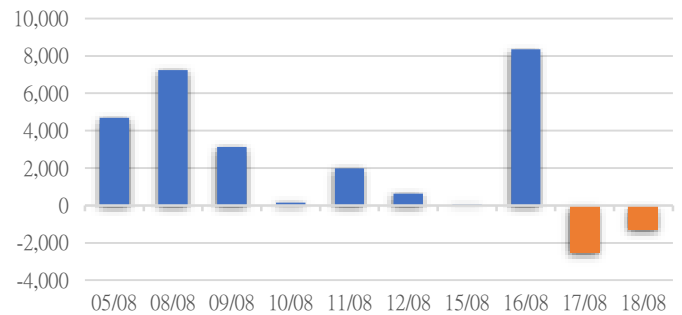
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
		QNS	919

UPCoM 自營交易最大前名

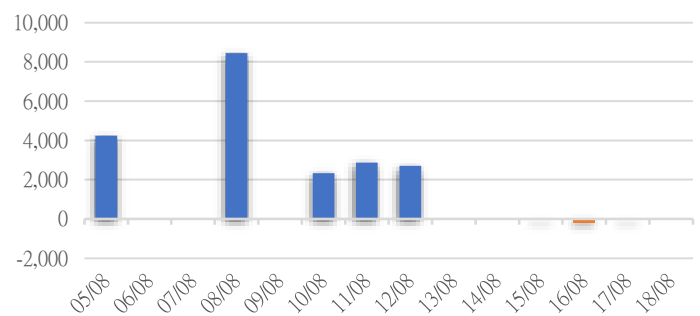
HSX 自營交易每日買/賣超  
(Bil.VND)



HNX 自營交易每日買/賣超  
(Mil.VND)



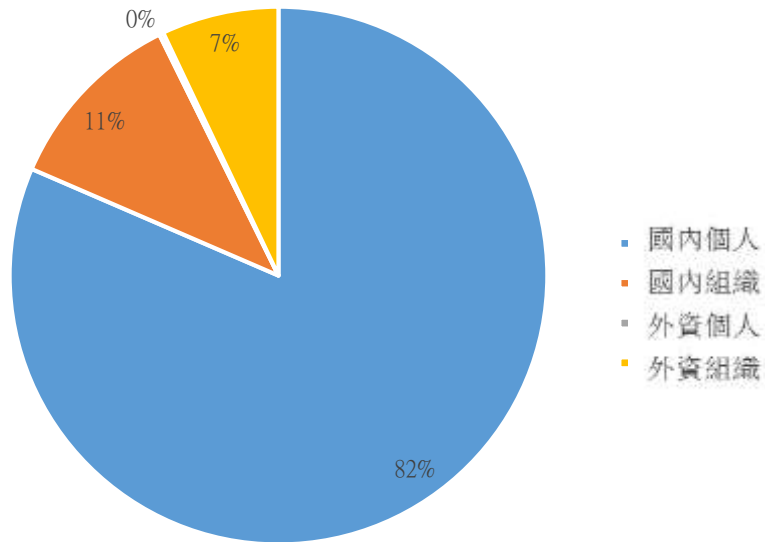
UPCoM 自營交易每日買/賣超  
(Mil.VND)





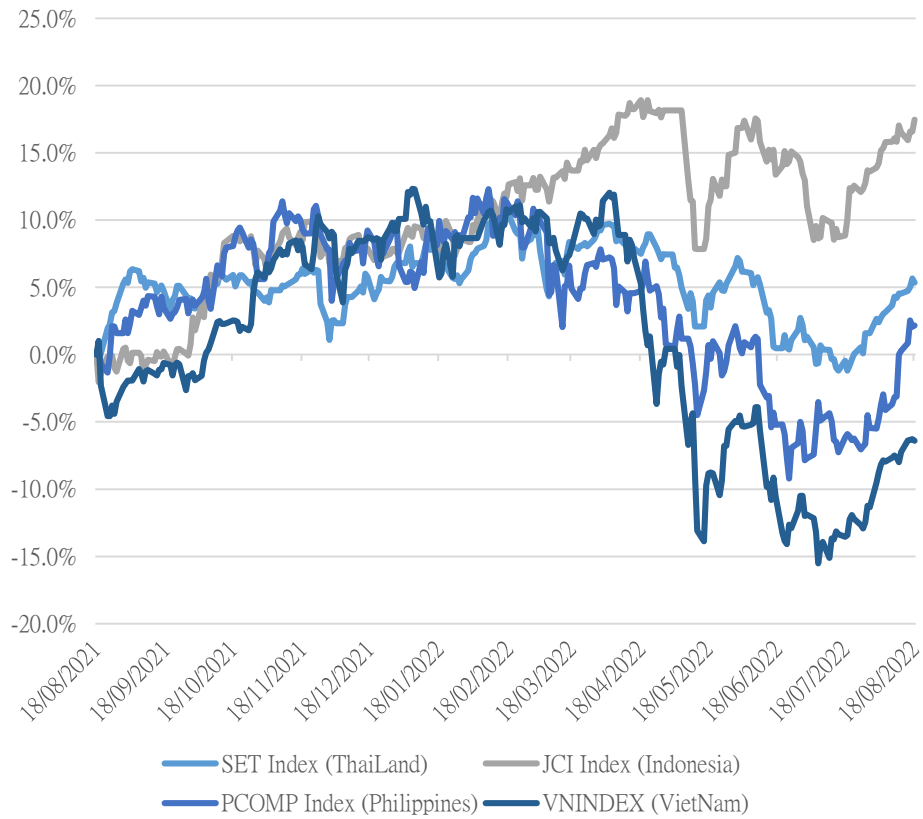
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### 越南證券市場投資人類別統計



資料源: FiinPro - YSVN

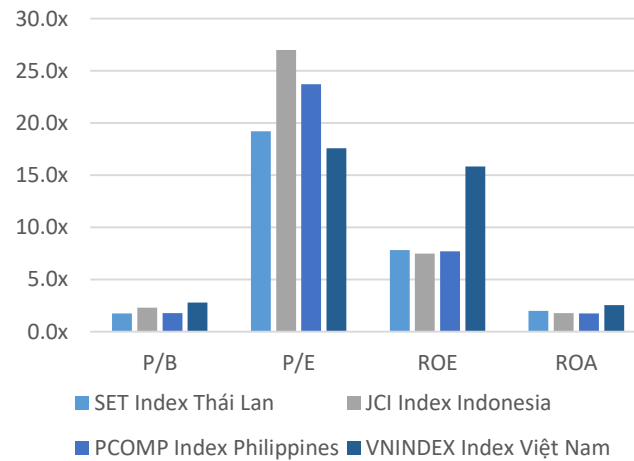
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.6x	2.2x	1.7x	2.1x
P/E		16.8x	15.45	17.6x	13.6x
ROE	%	9.52	13.38	10.10	15.49
ROA	%	2.41	3.39	2.29	2.52
Vốn hóa	Tỷ USD	551.22	626.20	171.71	216.67
GTGD	Triệu USD	1.93	0.80	0.11	0.66
LS cổ tức	%	2.73	2.51	1.87	1.44

源: Bloomberg & YSVN







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