

## 當日市場：拋售力量繼續占主導地位

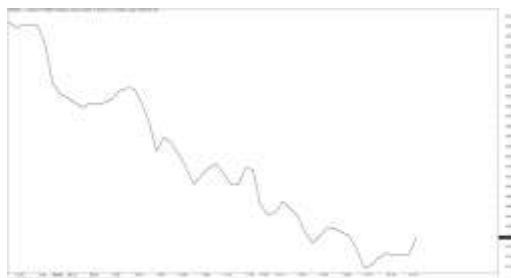
2022/10/24

### 市場走勢

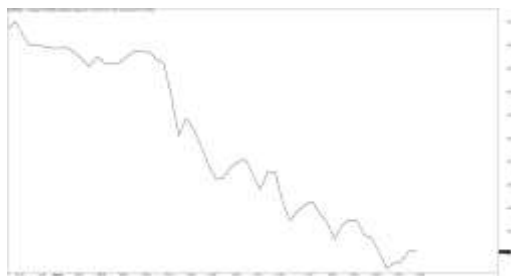
市場指數	VNI	HNI	UPCOM
收盤	1,019.82	217.41	78.57
%日	-3.65%	-3.75%	-2.74%
%週	-3.96%	-4.60%	-1.98%
%月	-15.76%	-17.99%	-10.95%
%年	-26.35%	-44.03%	-21.25%
<b>成交值(Bil.VND)</b>			
當日	9,763	1,044	442
日均量/週	10,195	994	488
日均量/月	11,990	1,087	576
<b>外資進出</b>			
買進	1,382.61	30.39	20.44
賣出	1,820.56	8.64	16.14
買賣超	-437.95	21.75	4.30
<b>市場漲跌家數</b>			
上漲	138	30	149
下跌	305	167	107
持平	56	73	84
<b>市場指標</b>			
P/E	10.78	12.19	12.42
總市值 (兆盾)	4,094	263	1,059
股息殖利率	1.77%	4.75%	3.66%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



### 市場走勢

越南股市在本週最後一個交易日劇烈波動，而美國和地區股市的走勢較為平穩。VN-Index 下跌近 1,000 點，收於 1,019.82 點，下跌 3.65%，HNX-Index 下跌 3.75%，Upcom-Index 下跌 2.74%。3 大市場的交易額達到 13 兆 5,500 億越南盾。

市場的寬幅相當負面，在 HOSE 上有 152 檔跌停股。CTG、SSI、STB、TCB、MWG 和 GVR 均是 VN30-Index 的跌停股。SAB (0.9%) 是本週最後一個交易日唯一逆轉上漲的股票。此外，VNM (-0.6%)、NVL (-0.1%) 也比大盤小幅下跌。

外資在全市場逆轉賣超 4,120 億越南盾。HPG (2,330 億)、VHM (1,530 億)、VND (840 億) 被拋售最多的股票。另一方面，VNM (960 億)、MSN (510 億)、VCB (460 億) 在買超方面領先。

### 市場短期觀點

我們認為市場可能在本週首個交易日復甦，VN-Index 可能在本週首個交易日測試 1,000 點。同時，市場仍處於短期調整階段，因此 VN-Index 在短期內可能無法突破 1000 點。此外，短期情緒指標小幅下跌，並仍位於過度悲觀區域以上。

大盤短期走勢仍為下跌。因此，我們建議短期投資者可以觀察市場，並暫時停止新買，以觀察本週首個交易日的市場走勢。

從周線圖來看，VN-Index 的價格走勢圖跌入超賣區域，因此價格走勢圖可能在下個交易週出現復甦。同時，大盤的中期走勢仍為下跌。目前，市場尚未出現明顯復甦的跡象，因此下跌風險仍較高，中期投資者在現階段不宜冒險探索買進底部。因此，我們建議中期投資者可以繼續觀察市場，並仍然保持低比例的股票。

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	下跌	1310	1500	1270	1200
HNX-Index	下跌	下跌	470	500	300	180
VN30	下跌	下跌	1320	1570	1285	960
VNMidcaps	下跌	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	1019.82	-3.65%
VN30	1010.57	-4.05%
VN Mid	1333.89	-4.49%
VN Small	1170.61	-4.73%

河內交易所 (HSX)

	收盤	漲跌%
HNI	217.41	-3.75%
HN30	360.92	-5.56%
VNX AllSh	986.04	-4.23%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	78.57	-2.74%

外資交易	成交值 (BiL.VND)
買進	1382.61
賣出	1820.56
買超/賣超	-437.95

外資交易	成交值 (BiL.VND)
買進	30.39
賣出	8.64
買超/賣超	21.75

外資交易	成交值 (BiL.VND)
買進	20.44
賣出	16.14
買超/賣超	4.30

上漲排名/股碼	漲跌(VND)	漲跌%
SHI	300	2.04%
SAB	1700	0.89%
KDC	400	0.65%
SAM	50	0.52%
CTF	0	0.00%

上漲排名/股碼	漲跌(VND)	漲跌%
CAP	1900	2.25%
DDG	200	0.49%
HTP	0	0.00%
GKM	0	0.00%
OCH	0	0.00%

上漲排名/股碼	漲跌(VND)	漲跌%
PVX	143	4.33%
HTG	1204	4.20%
SIP	4542	3.81%
DSC	1398	3.38%
QNS	-147	-0.34%

下跌排名/股碼	漲跌(VND)	漲跌%
CTR	-4200	-7.00%
DPG	-2100	-7.00%
HCM	-1400	-7.00%
LCG	-560	-7.00%
TTF	-350	-7.00%

下跌排名/股碼	漲跌(VND)	漲跌%
AMV	-500	-10.00%
HUT	-2000	-10.00%
API	-1200	-9.92%
L14	-5100	-9.90%
CSC	-4900	-9.88%

下跌排名/股碼	漲跌(VND)	漲跌%
SBS	-572	-9.69%
DDV	-1074	-7.90%
TCI	-528	-6.77%
MPC	-1382	-6.64%
PAT	-6231	-6.37%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	BiL.VND
VCB	327,490
VIC	223,497
VHM	217,718
GAS	212,257
BID	167,690

市值排名/股碼	BiL.VND
KSF	22,530
IDC	15,444
THD	14,385
BAB	11,550
PVS	11,328

市值排名/股碼	BiL.VND
ACV	168,004
VGI	82,402
BSR	63,901
VEA	59,384
MCH	53,118

交易量排名/股碼	成交值	30 日均
EIB	45,658,200	1,478,704
HPG	45,155,900	22,605,476
SSI	28,376,400	15,495,623
VND	25,296,000	17,836,551
PVD	23,900,900	9,603,874

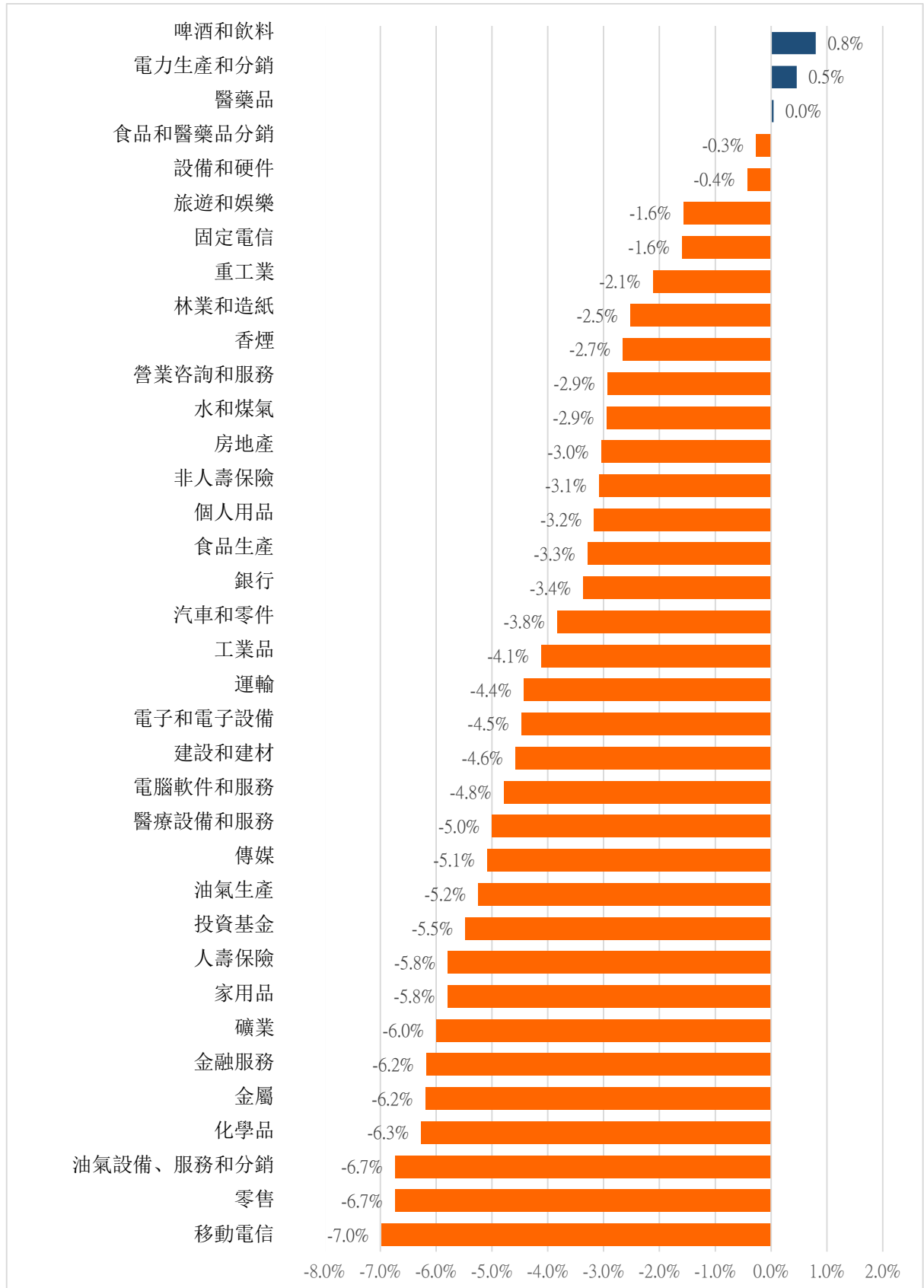
交易量排名/股碼	成交值	30 日均
SHS	16,408,288	8,652,480
PVS	15,649,918	6,871,406
KLF	6,789,921	2,102,448
IDC	5,839,066	4,367,174
CEO	5,780,374	3,704,936

交易量排名/股碼	成交值	30 日均
BSR	12,778,238	6,621,205
PVX	4,796,712	536,342
SBS	2,155,219	950,604
DSC	2,008,701	255,103
HVG	1,732,008	287,352

資料源: Bloomberg & Yuanta Research

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## 各行業板塊的交易走勢

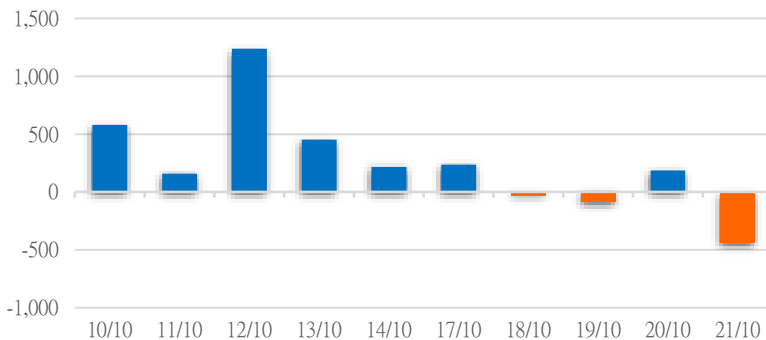


資料源:: FiinPro - YSVN

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### 外資買進賣統計

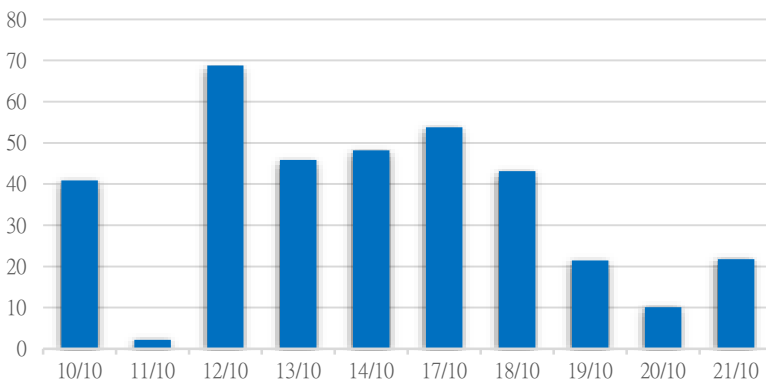
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VNM	95,514	HPG	232,484
MSN	50,781	VHM	152,884
VCB	45,576	VND	84,163
FRT	39,858	STB	56,419
DCM	35,480	SSI	51,125

HSX 外資買/賣超的前 5 名

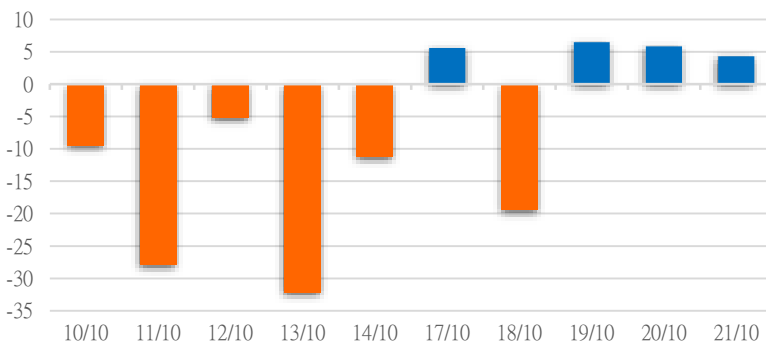
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	17,653	IDC	1,445
PVI	1,623	EVS	412
BVS	1,402	DHT	385
L14	1,301	PCE	59
MBG	890	HGM	42

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	3,462	ACV	2,098
MCH	1,255	HD6	798
VTP	1,168	CSI	463
AAS	830	VEA	193
SIP	725	VLB	181

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)
FUEKIV30	20,045	PNJ	41,438
FUESSVFL	11,945	E1VFN30	24,852
BCM	3,340	ACB	23,682
DBC	1,705	VPB	23,128
GMD	1,651	TCB	21,557

HSX 自營交易最大前名

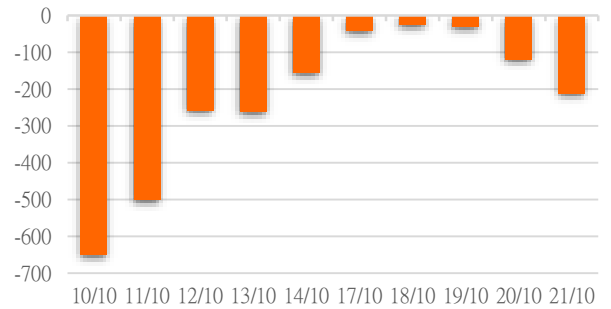
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
		PVS	535
		VCS	114.2
		GKM	79.8
		CSC	5.6
		DAE	1.1

HNX 自營交易最大前名

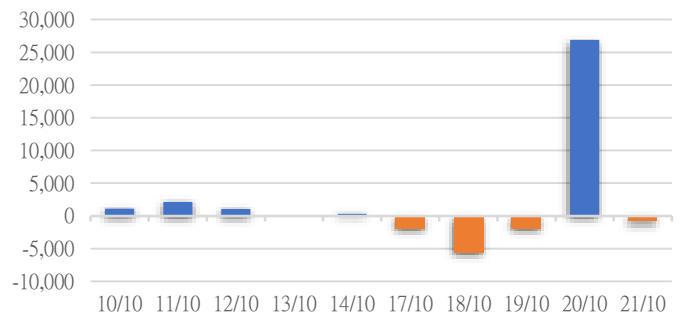
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
QTP	570	SIP	2,161
		VOC	44
		VTP	3.1
		CT6	0.3
		DAC	0.3

UPCoM 自營交易最大前名

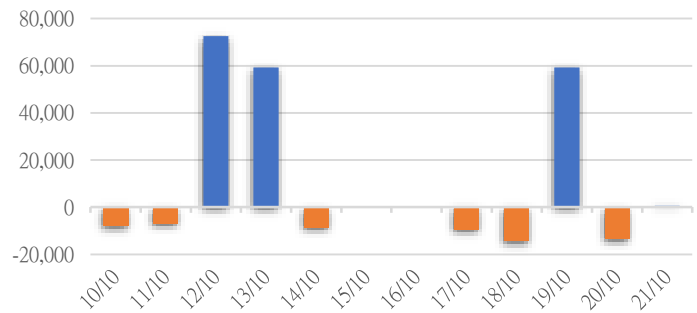
HSX 自營交易每日買/賣超 (Bil.VND)



HNX 自營交易每日買/賣超 (Mil.VND)



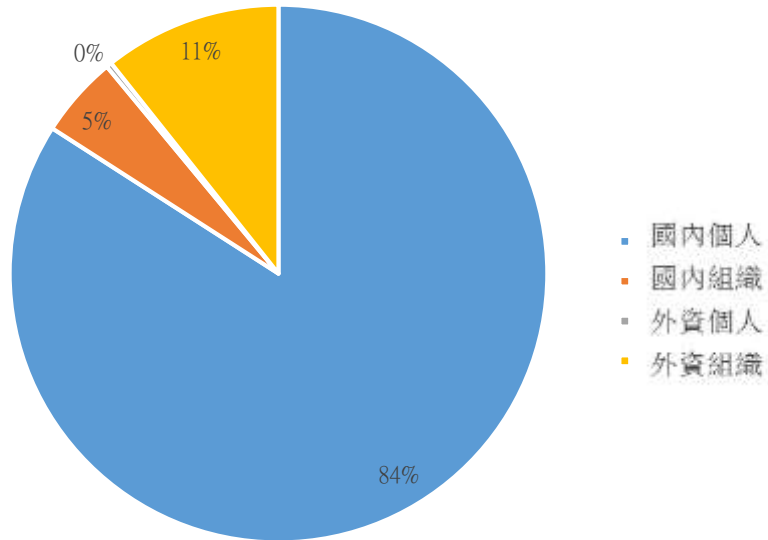
UPCoM 自營交易每日買/賣超 (Mil.VND)





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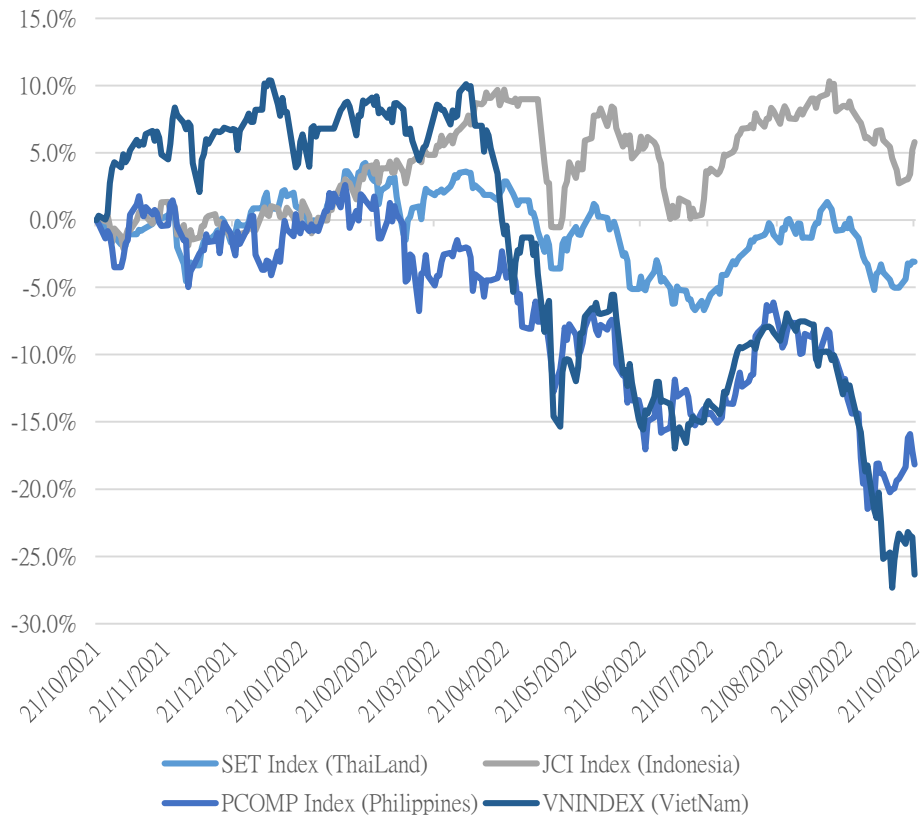
### 越南證券市場投資人類別統計



資料源: FiinPro - YSVN



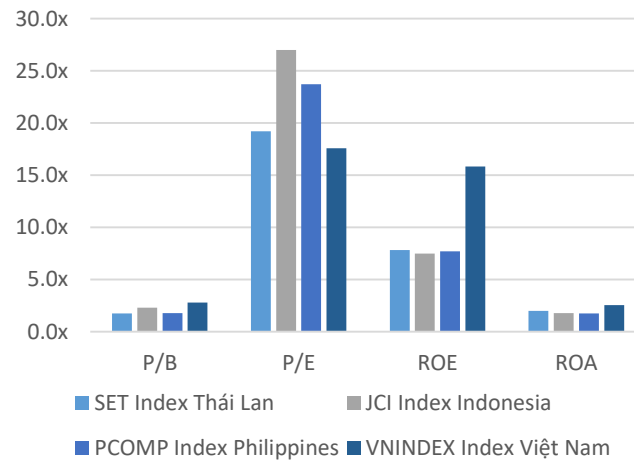
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.6x	2.1x	1.5x	1.7x
P/E		15.0x	14.97	15.5x	10.9x
ROE	%	9.64	14.52	10.07	15.59
ROA	%	2.43	3.73	2.29	2.54
Vốn hóa	Tỷ USD	501.38	593.05	145.48	171.28
GTGD	Triệu USD	1.59	0.87	0.11	0.29
LS cổ tức	%	2.85	2.62	2.19	1.84

源: Bloomberg & YSVN







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