

## 當日市場：市場的指數重新復甦

2022/10/26

### 市場走勢

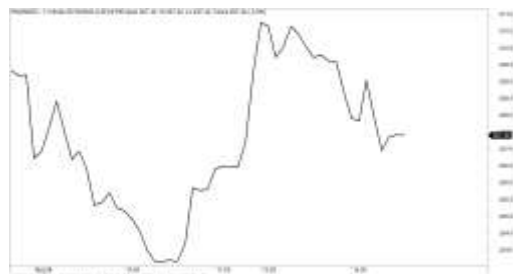
市場指數	VNI	HNI	UPCOM
收盤	997.70	208.02	76.25
%日	1.17%	-0.71%	-0.26%
%週	-6.20%	-9.21%	-5.07%
%月	-17.08%	-21.34%	-13.93%
%年	-27.98%	-47.45%	-24.45%
<b>成交值(Bil.VND)</b>			
當日	9,763	1,044	442
日均量/週	11,188	990	503
日均量/月	12,170	1,079	562
<b>外資進出</b>			
買進	1,267.02	13.81	14.88
賣出	1,351.53	3.03	12.72
買賣超	-84.51	10.78	2.15
<b>市場漲跌家數</b>			
上漲	138	55	149
下跌	305	128	107
持平	56	73	84
<b>市場指標</b>			
P/E	10.34	12.07	12.20
總市值 (兆盾)	3,959	254	1,042
股息殖利率	1.74%	4.97%	3.33%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



### 市場走勢

低價需求復甦，幫助指數出現更多積極的走勢。其中，VN-Index 收漲 1.17%，止於 997.7 點，HNX-Index 下跌 0.71%，Upcom-Index 下跌 0.26%。3 大市場的交易額達到 12 兆 4,610 億越南盾。

大型股在當日復甦良好，尤其是 LPB、HSG、CTG 等銀行和鋼鐵股均漲停。VN30-Index 錄得 20 檔上漲股和 6 檔下跌股，其中 BVH、HPG、SAB、VNM、VRE 和 VCB 也錄得超過 2% 的漲幅。另一邊，房地產股表現弱於大市，KDH、GVR、KBC、DIG、DXG 均錄得大幅下跌。

同時，儘管許多企業在第三季度錄得積極的業績，如 BMP、PDR、FOX 等，但中小型股的現金流依然謹慎。

外資在整個市場賣超 720 億越南盾。VND（1,240 億）、HPG（630 億）、SSI（410 億）被拋售最多的股票。另一方面，MSN（510 億）、DCM（270 億）、VCB（250 億）在買超方面領先。

### 市場短期觀點

我們認為 VN-Index 在下個交易日可能在 1,000 點附近波動。同時，在股票的下跌壓力依然較大的情況下，受抵押結算活動的影響，成交量很可能會保持在高位，積極點是市場仍處於短期調整階段，因此 VN-Index 可能無法突破 1000 點。此外，短期情緒指標持續下跌，顯示投資者對目前的走勢仍非常悲觀，但這是在市場大幅下跌的情況下限制拋售的時期。

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。

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	997.7	1.17%
VN30	991.52	1.81%
VN Mid	1295.97	0.91%
VN Small	1113.96	-1.06%

河內交易所 (HSX)

	收盤	漲跌%
HNI	208.02	-0.71%
HN30	339.71	-0.73%
VNX AllSh	962.59	1.34%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	76.25	-0.26%

外資交易	成交值 (BiL.VND)
買進	1267.02
賣出	1351.53
買超/賣超	-84.51

外資交易	成交值 (BiL.VND)
買進	13.81
賣出	3.03
買超/賣超	10.78

外資交易	成交值 (BiL.VND)
買進	14.88
賣出	12.72
買超/賣超	2.15

上漲排名/ 股碼	漲跌(VND)	漲跌%
LPB	650	6.95%
CTG	1450	6.90%
DPM	2900	6.90%
CKG	1500	6.88%
HSG	800	6.87%

上漲排名/ 股碼	漲跌(VND)	漲跌%
MST	400	5.41%
PVI	1600	4.06%
BVS	500	3.45%
SHS	200	2.90%
PVC	400	2.67%

上漲排名/ 股碼	漲跌(VND)	漲跌%
M10	1100	5.82%
TCI	207	3.04%
SIP	2780	2.59%
PAT	1696	1.74%
VUA	184	0.42%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ITC	-700	-7.00%
ACG	-3550	-6.97%
SMC	-850	-6.97%
SZC	-2050	-6.96%
PC1	-1700	-6.95%

下跌排名/ 股碼	漲跌(VND)	漲跌%
IDJ	-800	-10.00%
CSC	-4000	-9.93%
L14	-4100	-9.81%
CEO	-1300	-9.77%
L18	-2500	-9.77%

下跌排名/ 股碼	漲跌(VND)	漲跌%
VGT	-1740	-12.79%
TID	-4398	-12.35%
OIL	-709	-7.54%
SBS	-362	-7.54%
G36	-404	-6.97%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VCB	321,811
VIC	215,487
GAS	205,175
VHM	194,205
VNM	154,657

市值排名/ 股碼	BiL.VND
KSF	22,200
THD	14,210
IDC	13,596
BAB	11,387
PVS	9,894

市值排名/ 股碼	BiL.VND
ACV	160,411
VGI	71,094
VEA	58,134
BSR	55,738
MCH	51,162

交易量排名/ 股碼	成交值	30 日均
VND	77,334,929	18,343,579
HPG	31,189,500	25,446,645
SSI	23,849,400	16,949,585
STB	22,952,700	17,993,297
GEX	20,213,400	9,697,666

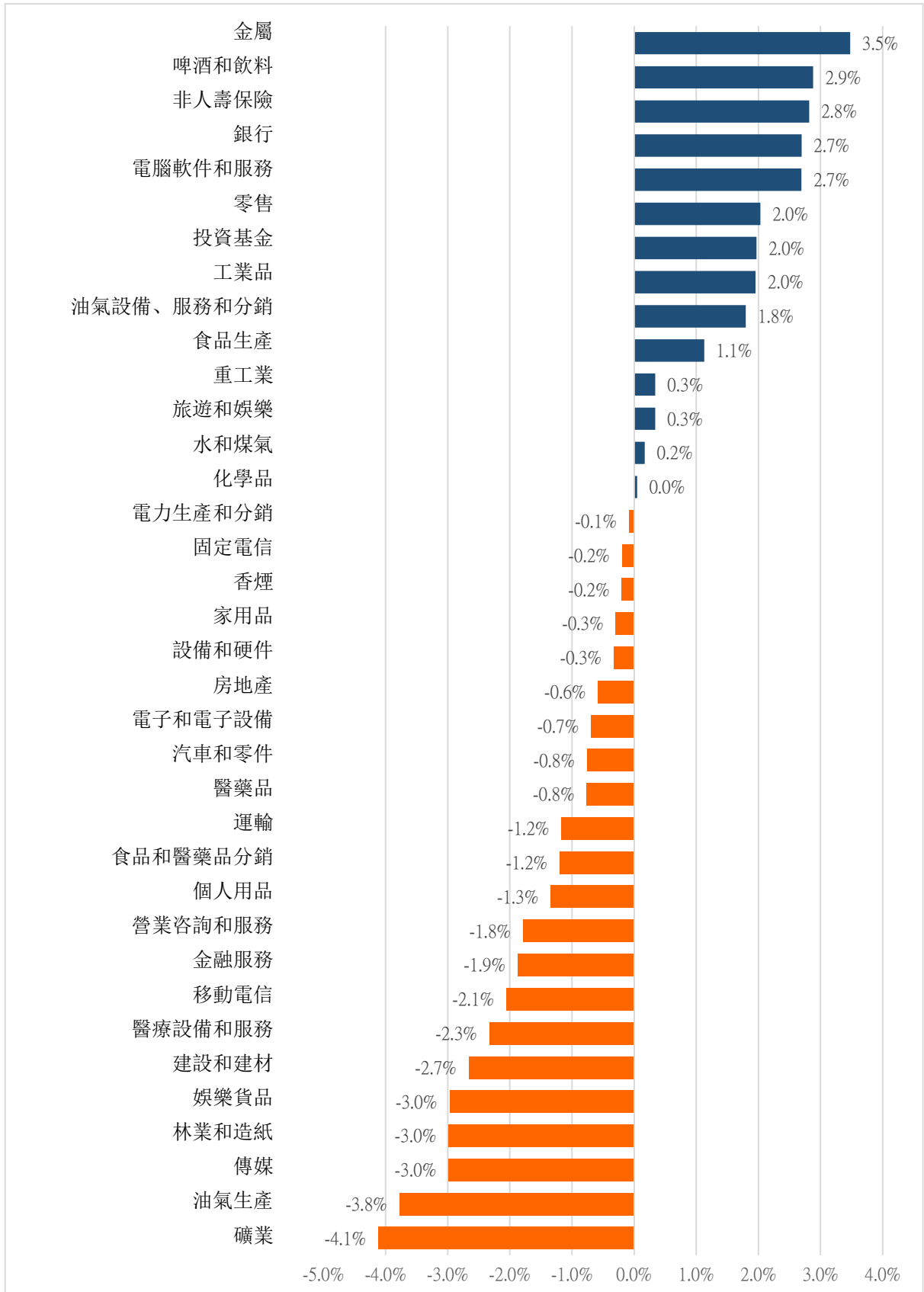
交易量排名/ 股碼	成交值	30 日均
SHS	13,287,001	9,403,223
CEO	8,979,306	4,045,037
HUT	8,568,614	2,221,427
PVS	7,194,304	7,478,477
IDC	3,860,653	4,570,344

交易量排 名/股碼	成交值	30 日均
BSR	9,030,326	7,150,472
VHG	3,497,905	1,426,059
PAS	2,061,400	1,151,110
VGT	1,713,760	617,146
SBS	1,633,926	1,099,586

資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢

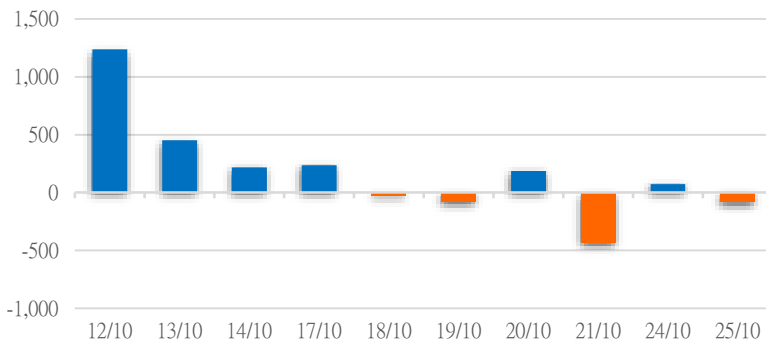


資料源:: FiinPro - YSVN

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## 外資買進賣統計

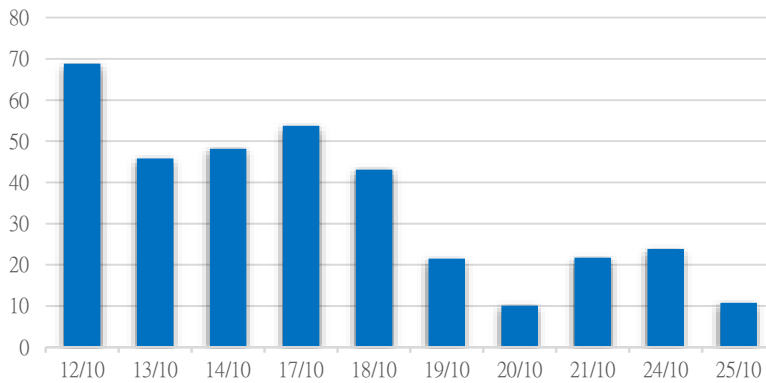
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MSN	51,286	VND	123,752
DCM	26,871	HPG	63,098
VCB	25,206	SSI	40,998
VNM	17,012	KDH	39,460
HDG	15,731	VHM	28,456

HSX 外資買/賣超的前 5 名

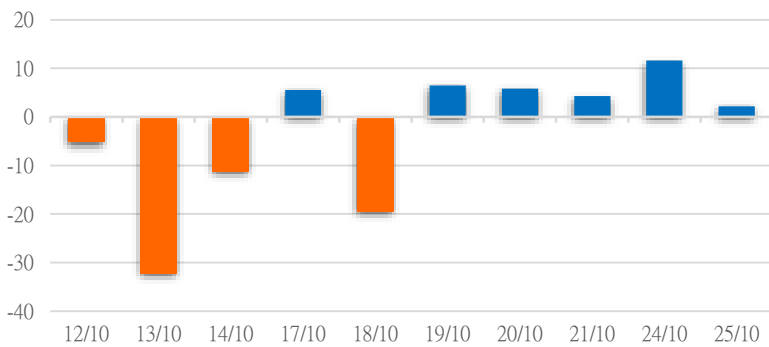
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	4,154	VNC	331
PVI	4,109	VCS	140
IDC	1,134	MBS	27
SHS	307	HUT	26
BVS	286	DXP	9

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	2,364	VEA	3,013
ACV	1,136	NTC	673
MCH	991	TVA	169
CSI	603	VTP	135
MCM	283	VGT	120

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)
FUEVFN30	50,417	E1VFN30	42,822
HPG	10,227	TCB	15,649
VNM	9,996	NVL	9,553
VIC	8,691	DHC	3,624
GMD	8,117	FUEDCMID	2,587

HSX 自營交易最大前名

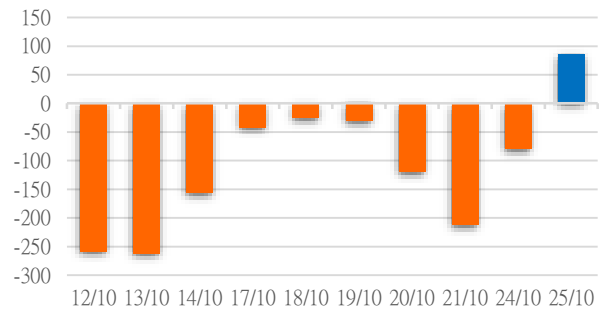
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
		GKM	155
		DP3	4.1
		DHT	3.2
		DDG	1.6
		DNM	1.4

HNX 自營交易最大前名

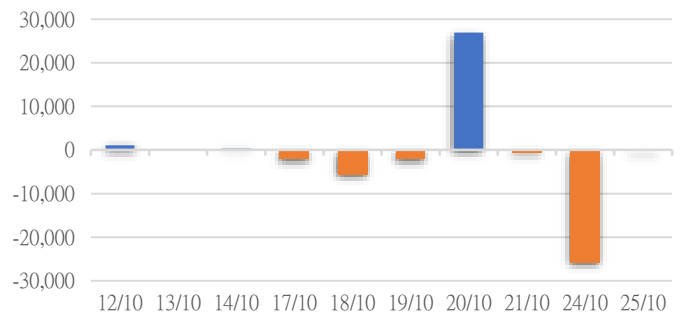
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DDV	741	SIP	4,949
QTP	139	PVP	1,399

UPCoM 自營交易最大前名

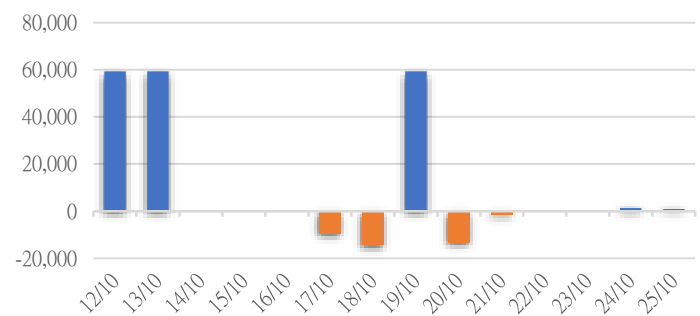
HSX 自營交易每日買/賣超  
(BiL.VND)



HNX 自營交易每日買/賣超  
(Mil.VND)

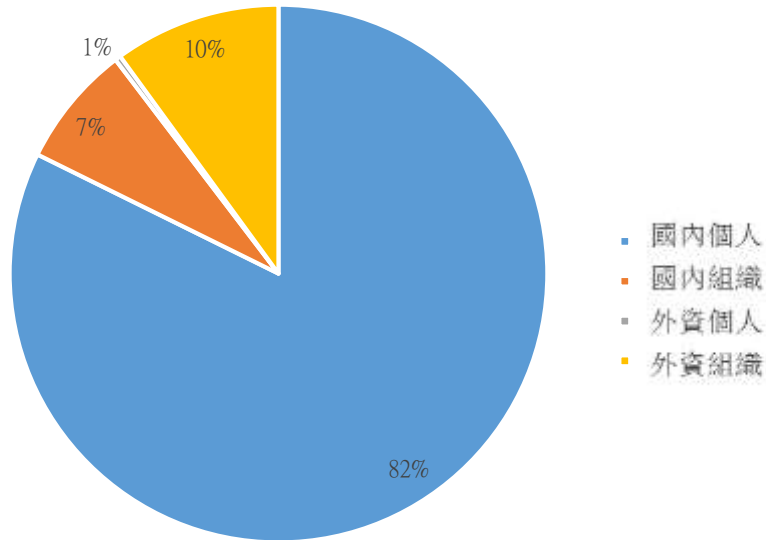


UPCoM 自營交易每日買/賣超  
(Mil.VND)



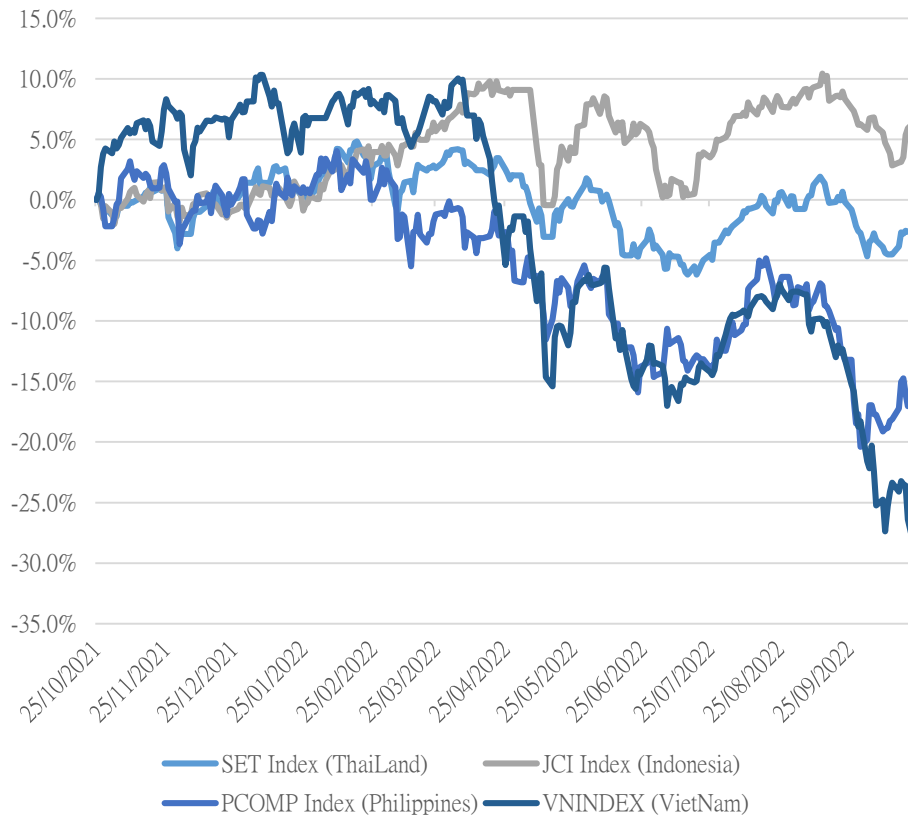
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## 越南證券市場投資人類別統計



資料源: FiinPro - YSVN

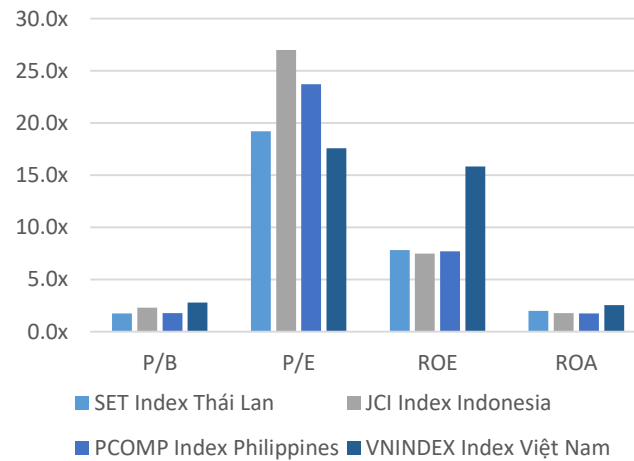
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.6x	2.1x	1.5x	1.6x
P/E		15.1x	14.99	15.7x	10.5x
ROE	%	9.72	14.64	10.07	15.62
ROA	%	2.48	3.76	2.29	2.56
Vốn hóa	Tỷ USD	501.90	601.79	144.68	158.49
GTGD	Triệu USD	1.19	0.71	0.05	0.36
LS cổ tức	%	2.84	2.61	2.16	1.89

源: Bloomberg & YSVN







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