

當日市場：大型股領漲

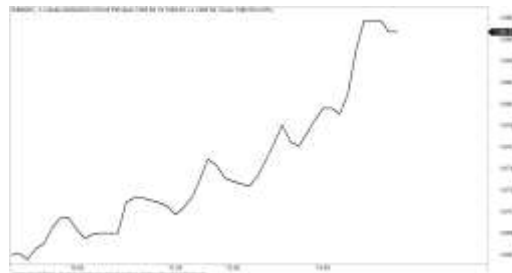
2023/02/21

市場走勢

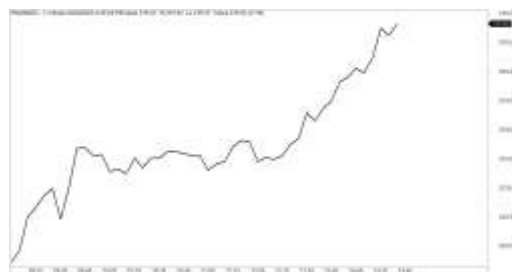
市場指數	VNI	HNI	UPCOM
收盤	1,086.69	215.83	78.83
%日	2.58%	2.80%	-0.14%
%週	4.12%	5.55%	2.11%
%月	-1.93%	-1.84%	6.56%
%年	-27.79%	-50.45%	-30.07%
<b>成交值(Bil.VND)</b>			
當日	9,763	1,044	442
日均量/週	8,882	1,038	556
日均量/月	10,691	1,085	484
<b>外資進出</b>			
買進	1,122.62	11.34	11.62
賣出	1,213.05	3.40	15.19
買賣超	-90.43	7.93	-3.57
<b>市場漲跌家數</b>			
上漲	138	0	149
下跌	305	0	107
持平	56	73	84
<b>市場指標</b>			
P/E	11.93	15.25	12.21
總市值 (兆盾)	4,260	264	998
股息殖利率	2.93%	5.93%	3.92%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

積極的市場情緒幫助市場指數回歸漲勢，並收於盤中的高位。具體而言，VN-Index 收於 1086.69 點，相當於上漲 2.58%，HNX-Index 上漲 2.8%，Upcom-Index 下跌 0.14%。3 大市場的交易額均達到 12 兆 4,400 億越南盾。

市場在點數和流動性方面均大幅上漲，漲勢擴散市場。銀行、證券、房地產、鋼鐵的指數領漲。其中，BID、HPG、VHM、VPB、MBB、ACB、SHB、SSI、TPB、VRE、STB 上漲超過 3%，NVL、HCM、PDR 漲停。

HNX 上的類似走勢與 CEO、BCC、SHS、PVC、PLC、TNG、VCS、VC3、VNR 上漲超過 3%。

外資在整個市場賣超 860 億越南盾，其中 VHM（660 億）、DCM（480 億）、DXG（410 億）被拋售最多的股票。另一方面，SSI（280 億）、HSG（250 億）、NVL（230 億）在買超方面領先。

市場短期觀點

我們認為市場可能會調整，VN-Index 可能會在下個交易日重新測試 20 日均線。同時，短期現金流強勁增長，並在各類股票之間分化，尤其是與市場在 2023 年 1 月處於積極階段相比，現金流出現強勁流入房地產股的跡象。此外，股票走勢寬幅強勁增加，顯示投資者對市場走勢更加樂觀，短期支付機會增加。

大盤的短期趨勢從下跌轉為上漲。因此，我們建議短期投資者可以利用調整以增加股票比例。

請在 <https://ysradar.yuanta.com.vn/> 查看有關股票的信號。

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	上漲	1110	1130	870	800
HNX-Index	上漲	上漲	197	210	189	160
VN30	上漲	上漲	1120	1140	980	960
VNMidcaps	上漲	上漲	1,030	1200	963	900
VNSmallcaps	上漲	上漲	1000	1150	804	750

**胡志明市交易所 (HSX)**

	收盤	漲跌%
VNI	1086.69	2.58%
VN30	1087.36	3.19%
VN Mid	1350.28	2.90%
VN Small	1150.36	2.78%

**河內交易所 (HSX)**

	收盤	漲跌%
HNI	215.83	2.80%
HN30	380.61	4.65%
VNX AllSh	1036.41	3.08%

**UPCOM 市場 (UPCoM)**

	收盤	漲跌%
UPCoM	78.83	-0.14%

外資交易	成交值 (Bil.VND)
買進	1122.62
賣出	1213.05
買超/賣超	-90.43

外資交易	成交值 (Bil.VND)
買進	11.34
賣出	3.40
買超/賣超	7.93

外資交易	成交值 (Bil.VND)
買進	11.62
賣出	15.19
買超/賣超	-3.57

上漲排名/ 股碼	漲跌(VND)	漲跌%
OGC	540	6.79%
EIB	868	4.73%
BCG	280	4.35%
ELC	500	4.13%
GSP	400	3.70%

上漲排名/ 股碼	漲跌(VND)	漲跌%
TIG	500	5.95%
PLC	1100	3.79%
DTD	300	2.38%
GKM	100	0.32%
CEO	0	0.00%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PVX	126	5.25%
DGT	367	4.89%
LTG	1090	4.14%
VGT	311	2.45%
G36	152	2.20%

下跌排名/ 股碼	漲跌(VND)	漲跌%
PSH	-220	-3.27%
CMX	-270	-2.74%
BMP	-1700	-2.72%
PGC	-400	-2.50%
DPM	-950	-2.44%

下跌排名/ 股碼	漲跌(VND)	漲跌%
MBG	-200	-4.00%
EVS	-300	-3.13%
TNG	-500	-2.76%
IDC	-1000	-2.39%
SHS	-200	-2.33%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BWS	-2000	-6.78%
VLB	-549	-1.85%
SSH	-962	-1.60%
DSC	-331	-1.42%
CSI	-585	-0.95%

\*備註: 市值>5,000 億盾; 成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	437,285
BID	227,634
GAS	206,515
VIC	203,664
VHM	185,061

市值排名/ 股碼	Bil.VND
KSF	15,240
IDC	13,794
THD	13,755
PVS	12,618
BAB	12,441

市值排名/ 股碼	Bil.VND
ACV	185,258
VGI	64,109
MCH	52,512
VEA	51,511
BSR	50,675

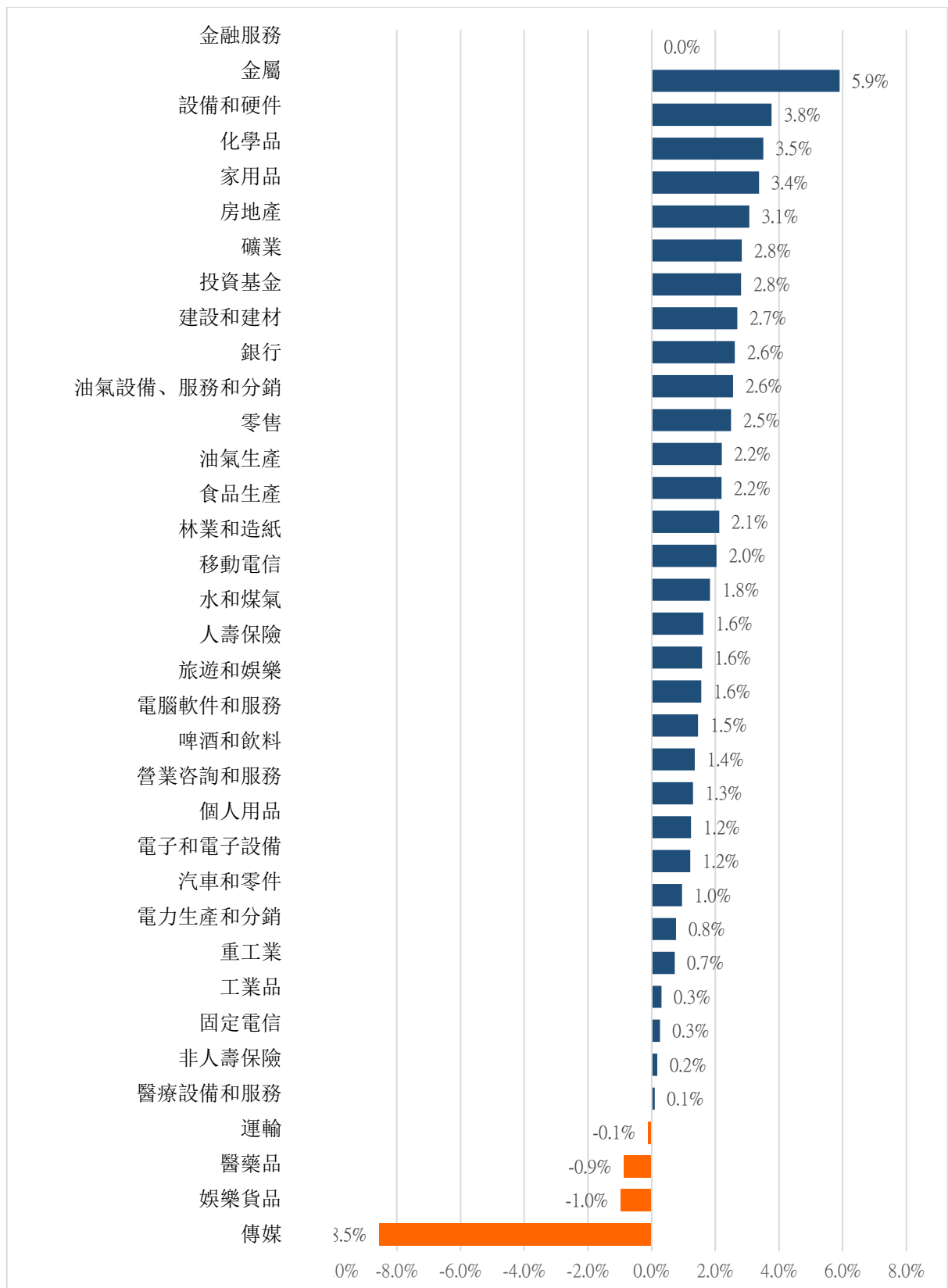
交易量排名/ 股碼	成交值	30 日均
NVL	23,503,600	16,870,668
LPB	19,286,900	9,126,502
STB	18,215,900	19,381,897
HSG	16,606,800	17,131,291
LCG	14,336,200	9,273,724

交易量排名/ 股碼	成交值	30 日均
CEO	9,008,735	8,898,506
SHS	6,581,333	15,744,450
KLF	5,830,139	323,639
IDC	4,802,755	3,169,284
PVS	4,407,474	6,195,328

交易量排 名/股碼	成交值	30 日均
BSR	4,483,057	9,742,739
C4G	4,384,301	2,742,693
VBB	2,884,672	11,644
HLG	2,767,999	17
DPS	2,428,733	105,979

資料源: Bloomberg & Yuanta Research

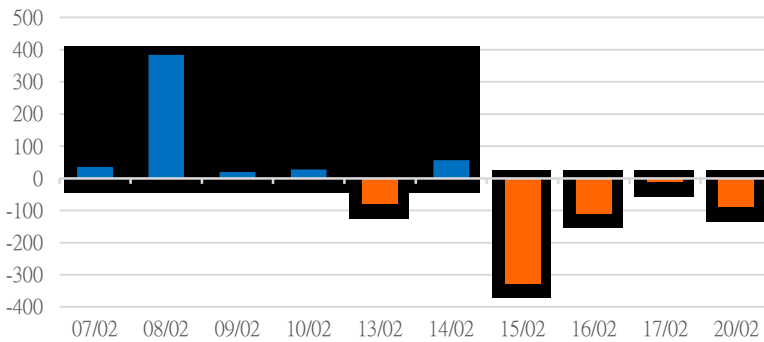
各行業板塊的交易走勢



資料源: FiinPro - YSVN

外資買進賣統計

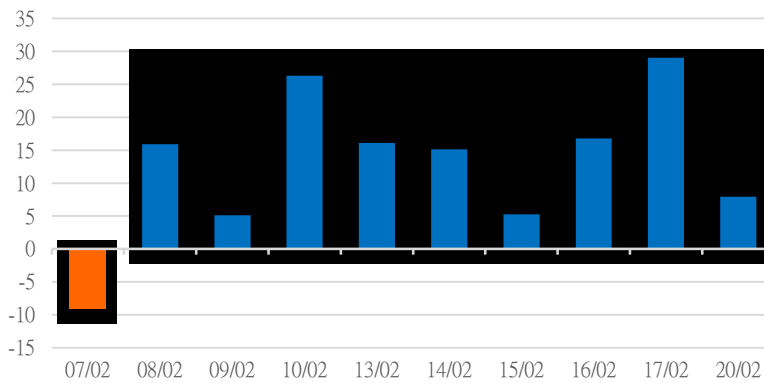
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
KBC	23,470	STB	35,127
VCI	18,016	HPG	26,623
HSG	15,523	DXG	19,995
SSI	15,517	CTG	16,849
BID	13,858	SHB	15,932

HSX 外資買/賣超的前 5 名

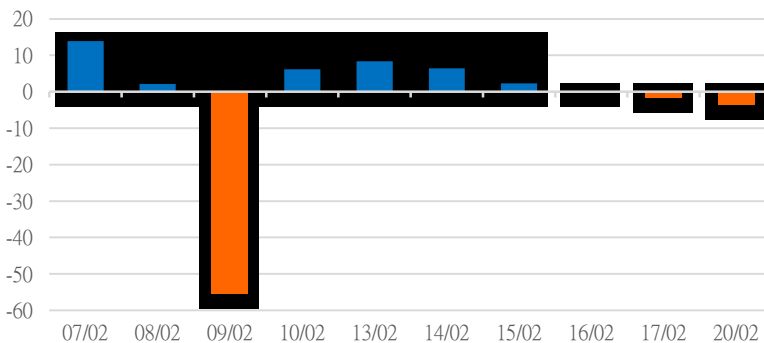
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	3,238	THD	154
IDC	2,082	NVB	61
SHS	1,682	VCS	41
HUT	1,173	TVD	12
CEO	1,111	IPA	11

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	1,394	VTP	2,558
VEA	622	ACV	1,481
LTG	537	MML	86
CNC	521	NBE	75
PHP	306	ABI	31

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

自營統計

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
E1VFN30	15,922	VNM	9,316
STB	7,055	MSN	7,940
PVT	6,088	VIC	7,258
PNJ	4,003	VPB	6,941
GMD	3,229	VCB	6,864

HSX 自營交易最大前名

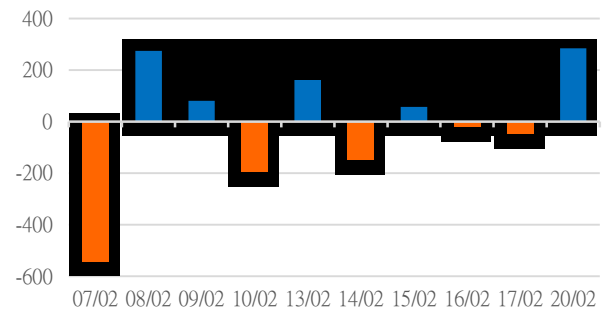
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
		DVM	4

HNX 自營交易最大前名

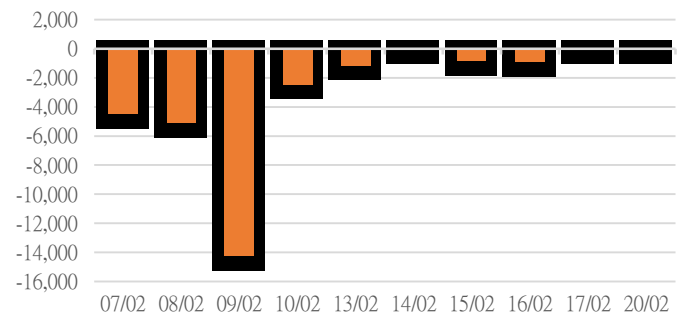
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MCH	732	AFX	3,894
QTP	2		

UPCoM 自營交易最大前名

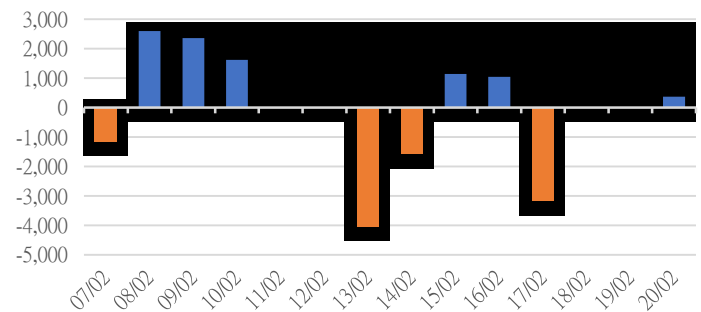
HSX 自營交易每日買/賣超 (Bil.VND)



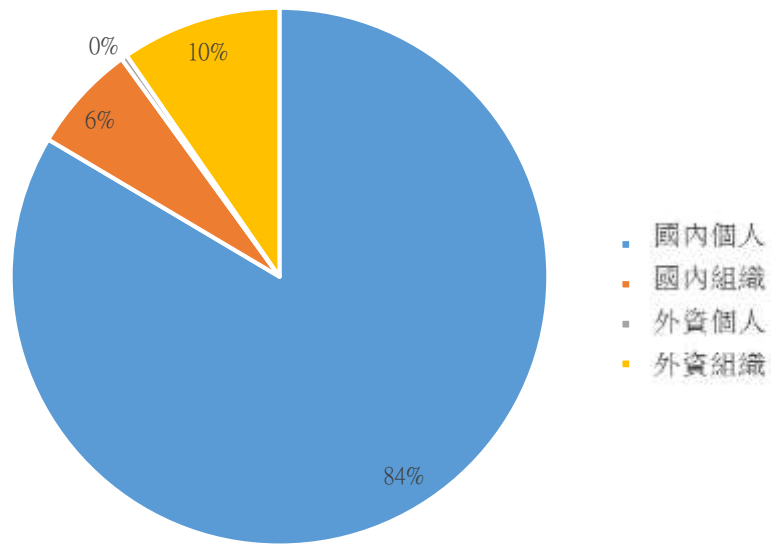
HNX 自營交易每日買/賣超 (Mil.VND)



UPCoM 自營交易每日買/賣超 (Mil.VND)

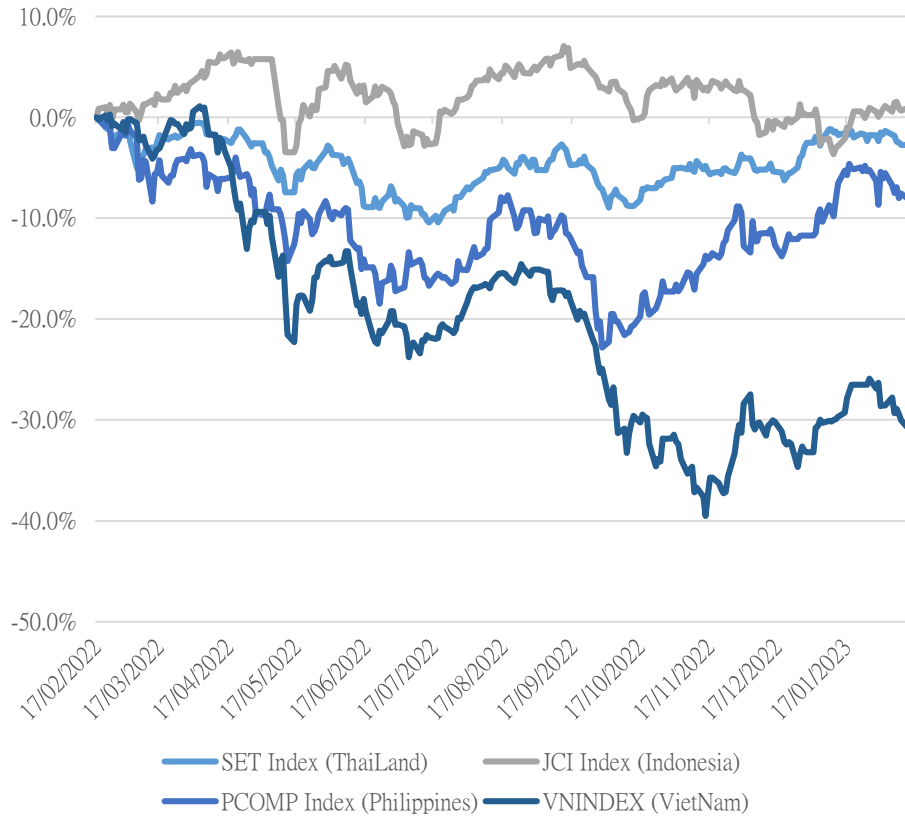


### 越南證券市場投資人類別統計



資料源: FiinPro - YSVN

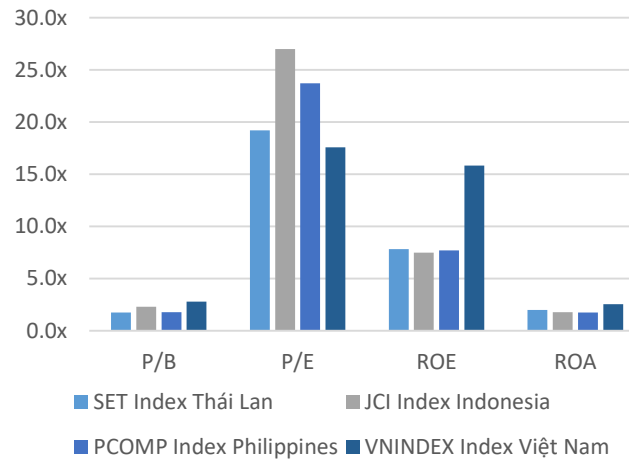
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.6x	2.0x	1.7x	1.7x
P/E		17.3x	15.3x	15.6x	13.6x
ROE	%	9.30	13.51	10.86	14.10
ROA	%	2.36	3.72	2.48	2.19
Vốn hóa	Tỷ USD	586.54	630.10	177.43	176.99
GTGD	Triệu USD	2.55	0.55	0.07	0.33
LS cổ tức	%	2.81	2.61	2.11	1.68

源: Bloomberg & YSVN





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