

當日市場：市場保持積極的情緒

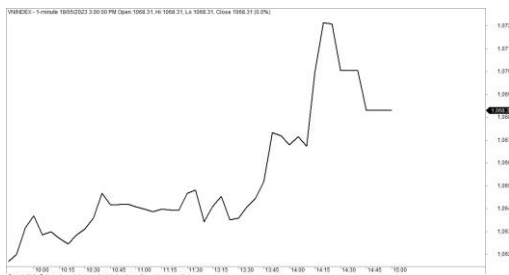
2023/05/19

市場走勢

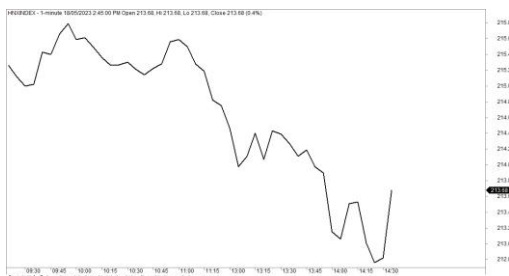
市場指數	VNI	HNI	UPCOM
收盤	1,068.31	213.01	80.91
%日	0.74%	0.07%	0.42%
%週	1.06%	-0.65%	2.25%
%月	1.26%	2.29%	2.77%
%年	-13.90%	-31.25%	-14.59%
<b>成交值(Bil.VND)</b>			
當日	9,763	1,044	442
日均量/週	12,369	1,579	630
日均量/月	10,448	1,320	613
<b>外資進出</b>			
買進	1,047.25	35.09	8.84
賣出	943.21	4.00	6.25
買賣超	104.03	31.09	2.59
<b>市場漲跌家數</b>			
上漲	138	77	149
下跌	305	80	107
持平	56	73	84
<b>市場指標</b>			
P/E	12.57	16.80	12.91
總市值 (兆盾)	4,261	267	1,009
股息殖利率	3.67%	1.78%	6.77%

資料源: Bloomberg – YSVN

VNINDEX



HNIINDEX



市場走勢

市場情緒維持穩定，並受昨日美股大幅上漲的積極影響，幫助指數積極上漲。具體而言，VN-Index 收漲 0.74%，止於 1068.31 點，HNX-Index 和 Upcom-Index 同步分別上漲 0.07% 和 0.42%。3 大市場的交易額均達到 12 兆 1,100 億越南盾。

銀行、房地產和證券在當日領漲。尤其是最高資本化的股票如 VHM (3%)、VCB (2.4%)、VCI (5.2%) 以及 VIB (3.1%)、GAS (1.2%)、TCB (1%)、BCM (1.3%) 等是支撐指數上漲的股票。另一方面，PDR (-1.5%)、BVH (-0.6%)、BID (-0.3%) 均弱於大盤。

DIG (-7%)、DLG (-3.3%)、VIX (-4.4%) 被強勁拋售，而 NLG、KDH 在此前下跌後逆轉上漲。

外資在整個市場繼續買超 1,380 億越南盾，其中 HPG (1,730 億)、VHM (960 億)、KDH (310 億) 在買超方面領先。另一方面，VNM (770 億)、CTG (600 億) 和 SHB (420 億) 被拋售最多的股票。

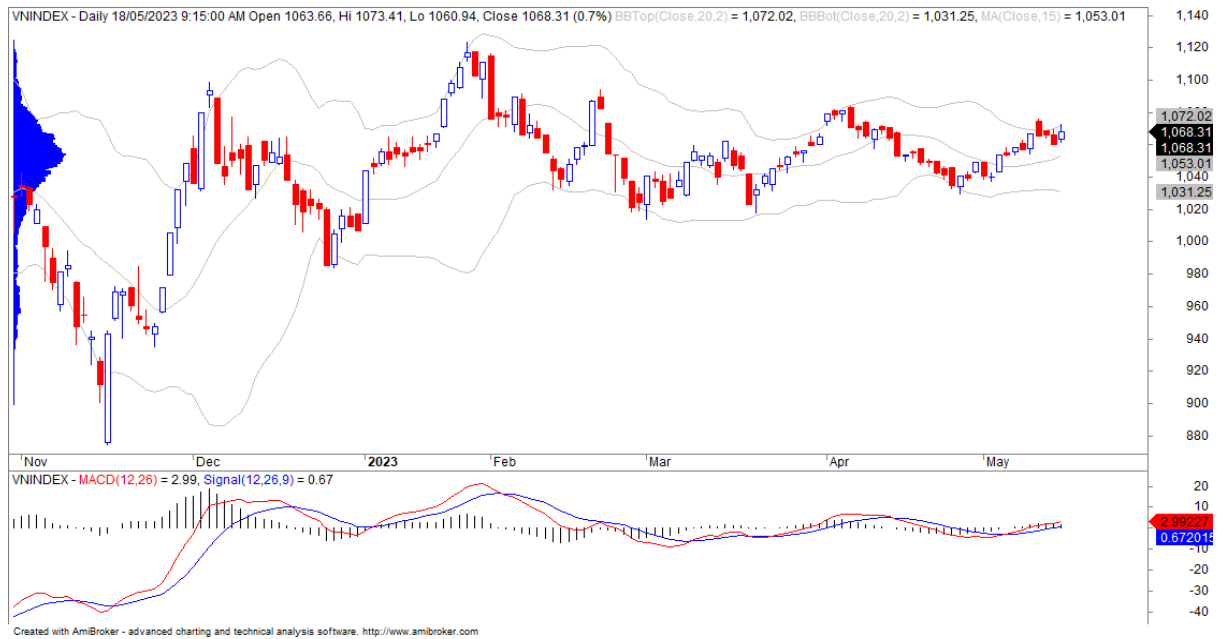
市場短期觀點

我們認為市場可能會在接下來的交易日調整，並在各類股票之間分化，這意味著我們評估中小型股可能會在接下來的交易日調整。同時，指數逼近強勁的阻力位，因此投資者應限制買進新股以避免 T+ 風險。此外，短期情緒指標仍處於樂觀水平，因此現金流在短期內可能會在各類股票之間流動。

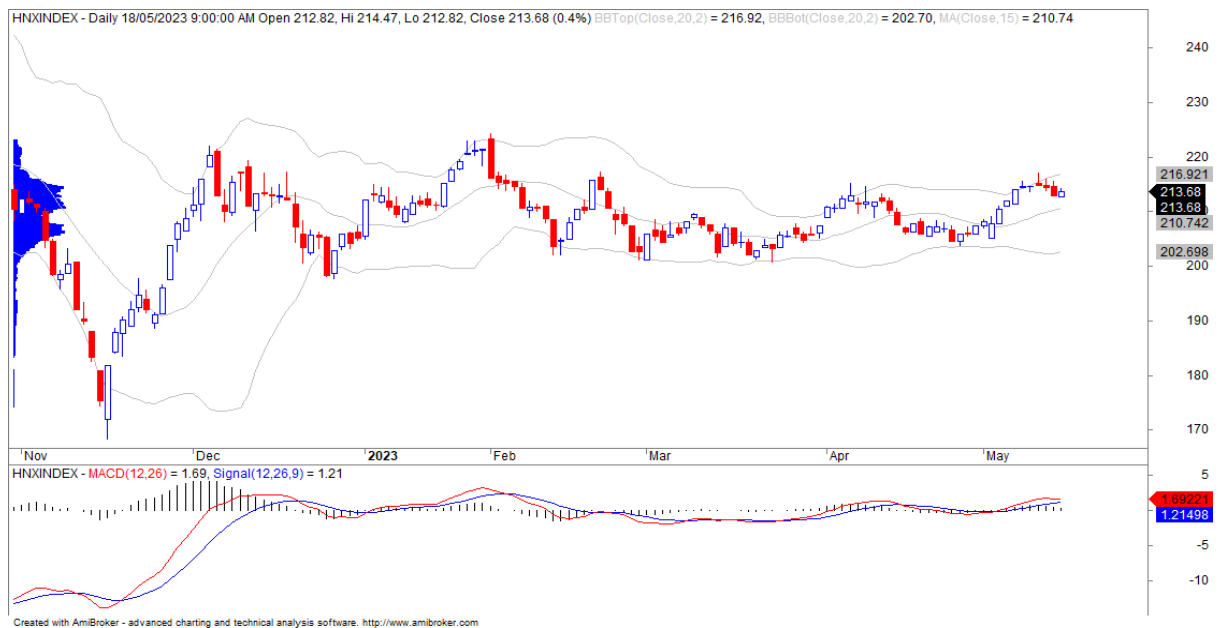
大盤的短期趨勢仍是上漲。因此，我們建議短期投資者可以繼續持有當前組合，並在當前期間限制買進新股，尤其是投資者應限制買進仙股，或者可以考慮在該股票的風險出現上漲的跡象時賣出一部分。

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	1068.31	0.74%
VN30	1070.76	0.82%
VN Mid	1346.19	0.13%
VN Small	1224.39	0.05%

**河內交易所 (HSX)**

	收盤	漲跌%
HNI	213.01	0.07%
HN30	386.35	0.03%
VNX AllSh	1029.82	0.57%

**UPCOM 市場 (UPCoM)**

	收盤	漲跌%
UPCoM	80.91	0.42%

外資交易	成交值 (Bil.VND)
買進	1047.25
賣出	943.21
買超/賣超	104.03

外資交易	成交值 (Bil.VND)
買進	35.09
賣出	4.00
買超/賣超	31.09

外資交易	成交值 (Bil.VND)
買進	8.84
賣出	6.25
買超/賣超	2.59

上漲排名/ 股碼	漲跌(VND)	漲跌%
CTI	850	6.75%
EVE	900	5.73%
ADS	700	5.32%
VCI	1700	5.28%
FTS	1200	4.76%

上漲排名/ 股碼	漲跌(VND)	漲跌%
BVS	1300	5.91%
APS	600	4.26%
DHT	1400	3.10%
IPA	300	2.21%
MBS	300	1.79%

上漲排名/ 股碼	漲跌(VND)	漲跌%
VEF	17178	13.89%
VNB	996	10.83%
NTC	7015	5.68%
SIP	2678	2.99%
PGB	778	2.78%

下跌排名/ 股碼	漲跌(VND)	漲跌%
DIG	-1450	-6.97%
HBC	-520	-6.07%
LDG	-240	-5.21%
TEG	-500	-4.93%
VIX	-440	-4.43%

下跌排名/ 股碼	漲跌(VND)	漲跌%
DDG	-700	-6.80%
DTD	-1500	-4.98%
LAS	-400	-3.85%
CAP	-1800	-2.63%
L14	-1200	-2.34%

下跌排名/ 股碼	漲跌(VND)	漲跌%
AAS	-317	-2.56%
QNS	-924	-1.98%
VGT	-193	-1.65%
VOC	-395	-1.59%
BSR	-152	-0.93%

\*備註: 市值>5,000 億盾; 成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	439,178
VHM	232,523
BID	226,622
VIC	202,901
GAS	175,892

市值排名/ 股碼	Bil.VND
THD	13,860
IDC	12,705
PVS	12,618
KSF	12,000
BAB	11,418

市值排名/ 股碼	Bil.VND
ACV	171,491
VGI	66,955
MCH	51,660
VEA	51,090
BSR	50,693

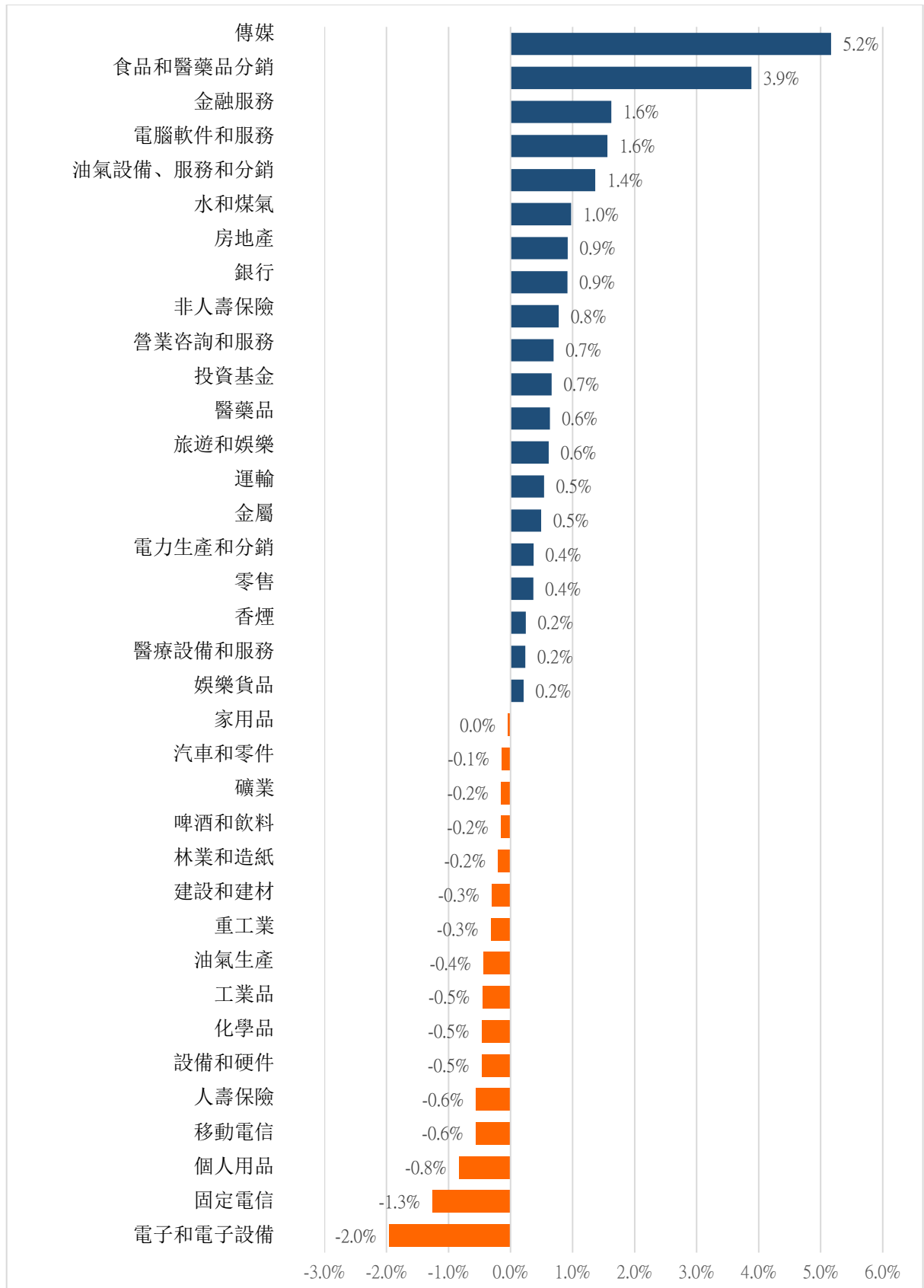
交易量排名/ 股碼	成交值	30 日均
DIG	33,831,900	23,497,316
SSI	27,097,400	17,945,538
GEX	22,781,100	10,723,061
VIX	21,999,700	17,180,614
VND	19,185,400	14,565,596

交易量排名/ 股碼	成交值	30 日均
SHS	25,791,087	19,736,071
DDG	13,786,708	2,782,019
CEO	7,004,697	7,915,552
PVS	5,727,502	3,898,054
MST	4,108,618	1,188,890

交易量排 名/股碼	成交值	30 日均
VAB	7,898,363	266,980
SBS	5,064,077	3,476,196
BSR	4,598,426	5,199,460
LMH	3,183,533	712,727
VHG	2,926,661	2,048,458

資料源: Bloomberg & Yuanta Research

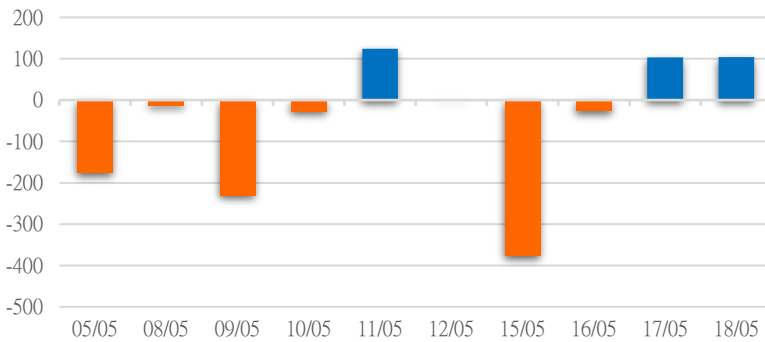
各行業板塊的交易走勢



資料源.: FinPro – YSVN

外資買進賣統計

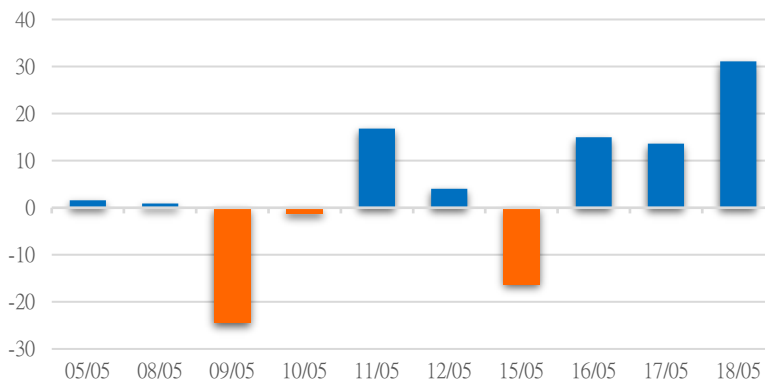
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
HPG	173,329	VNM	76,964
VHM	96,164	CTG	59,888
KDH	31,055	SHB	41,806
POW	25,275	STB	40,369
VND	25,059	NVL	24,857

HSX 外資買/賣超的前 5 名

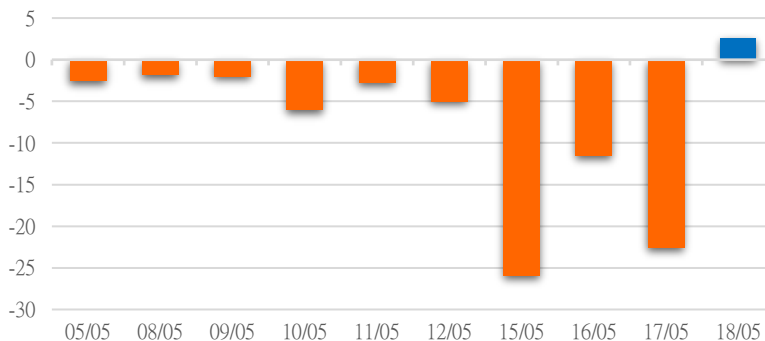
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DTD	15,255	MBS	715
CEO	6,938	PVI	486
DDG	4,846	IDC	444
PVS	3,185	BVS	368
TNG	3,107	NVB	295

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	4,757	QNS	2,097
MPC	1,115	VEA	555
PHP	184	VTP	444
CSI	159	VGG	219
QTP	66	ABI	157

UPCOM 外資買/賣超的前 5 名

源: FiiPro - 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)
SSI	31,399	STB	9,882
BMP	27,321	MWG	9,610
E1VFN30	20,909	MBB	7,975
FPT	20,184	DGC	6,561
VNM	19,912	VHM	4,351

HSX 自營交易最大前名

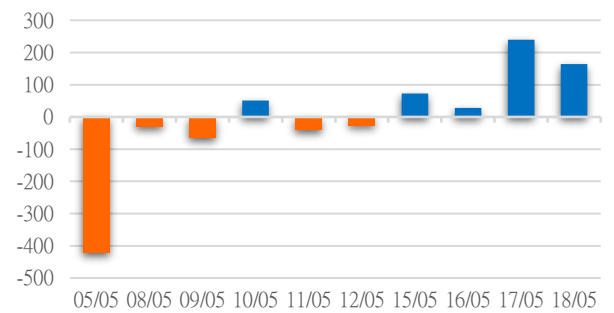
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DDG	1,354.00	INN	32,980
IDC	231.20	DTD	858.7
IDV	66.80	PVS	801.0

HNX 自營交易最大前名

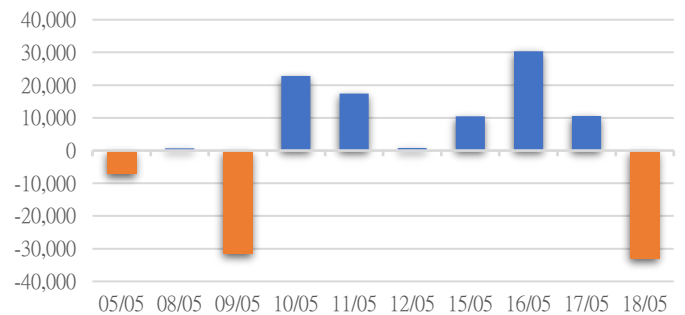
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MCH	391.46	TID	23
PHP	0		
NTC	0		

UPCoM 自營交易最大前名

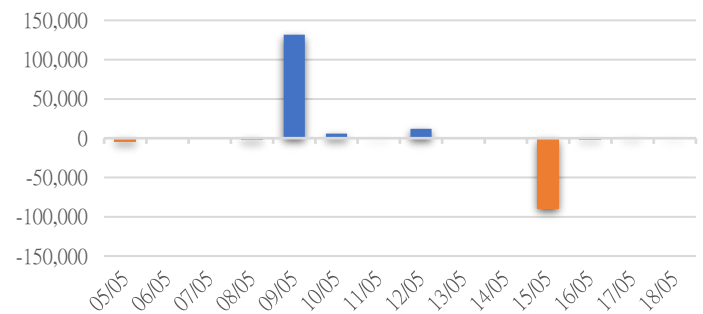
HSX 自營交易每日買/賣超 (Bil.VND)



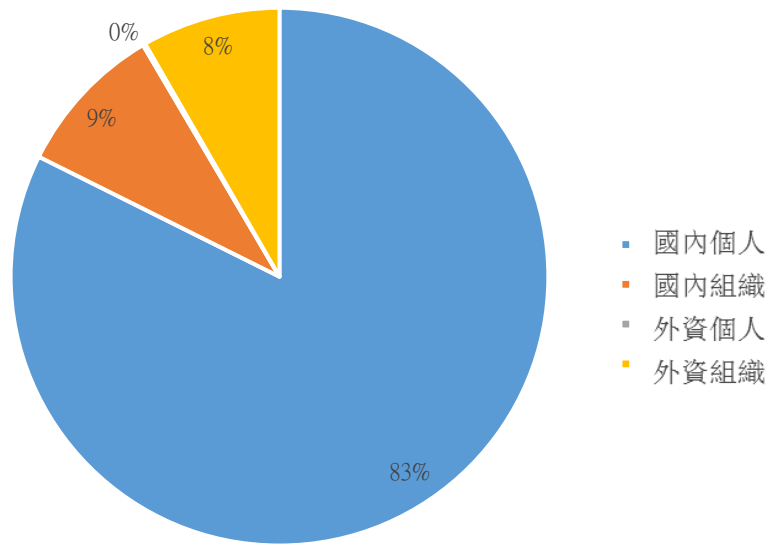
HNX 自營交易每日買/賣超 (Mil.VND)



UPCoM 自營交易每日買/賣超 (Mil.VND)

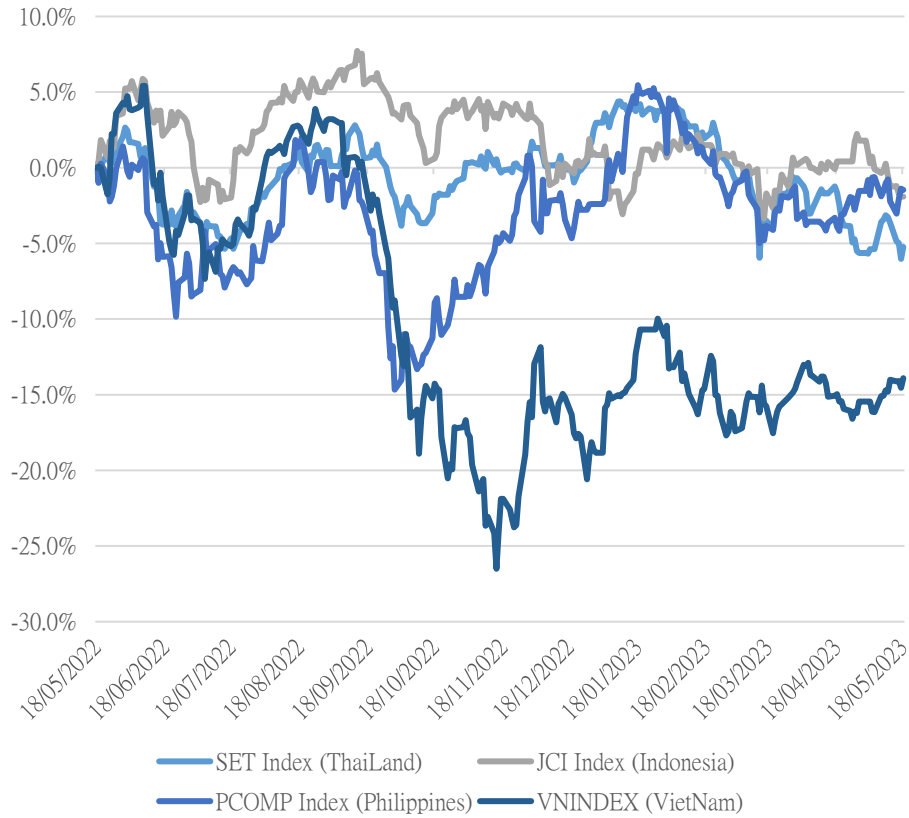


越南證券市場投資人類別統計



資料源: FiinPro – YSVN

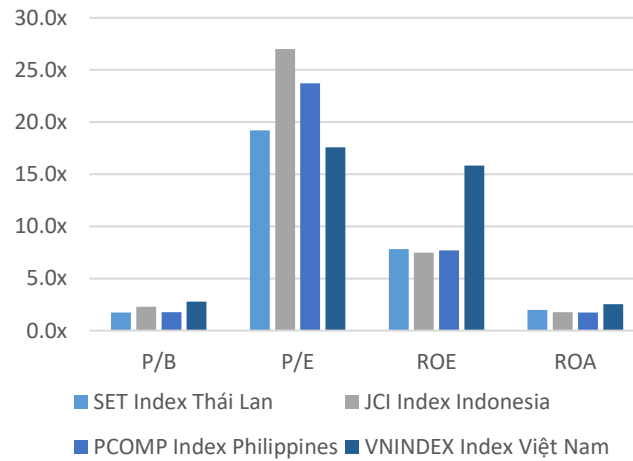
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.5x	1.9x	1.6x	1.6x
P/E		20.8x	14.4x	14.2x	14.4x
ROE	%	8.28	12.01	10.95	12.84
ROA	%	2.13	3.40	2.40	2.04
Vốn hóa	Tỷ USD	543.35	637.94	168.86	180.45
GTGD	Triệu USD	1.56	0.60	0.05	0.50
LS cổ tức	%	3.17	4.13	2.41	1.76

源: Bloomberg & YSVN





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