

當日市場：市場在阻力位強勁震盪

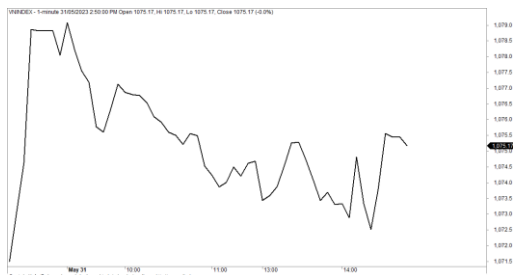
2023/06/01

市場走勢

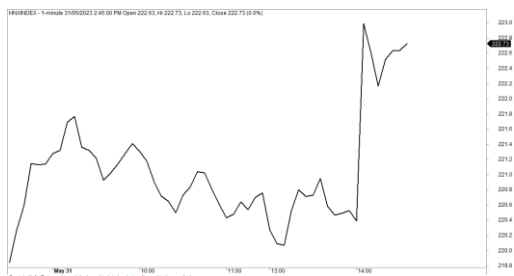
市場指數	VNI	HNI	UPCOM
收盤	1,075.17	222.81	82.05
%日	-0.27%	0.67%	0.47%
%週	1.26%	3.17%	1.38%
%月	2.48%	7.39%	5.50%
%年	-16.83%	-29.44%	-14.04%
<b>成交值(Bil.VND)</b>			
當日	9,763	1,044	442
日均量/週	13,719	1,793	892
日均量/月	12,275	1,586	661
<b>外資進出</b>			
買進	760.04	28.69	8.50
賣出	1,212.57	7.47	51.01
買賣超	-452.52	21.22	-42.51
<b>市場漲跌家數</b>			
上漲	138	61	149
下跌	305	34	107
持平	56	73	84
<b>市場指標</b>			
P/E	12.78	17.29	13.17
總市值 (兆盾)	4,331	276	1,028
股息殖利率	3.68%	1.56%	6.22%

資料源: Bloomberg – YSVN

VNINDEX



HNIINDEX



市場走勢

市場再次出現強勁震盪的階段，導致指數背離。具體而言，VN-Index 收跌 0.27%，止於 1075.17 點，HNX-Index 和 Upcom-Index 反轉分別上漲 0.67% 和 0.47%。3 大市場的交易額繼續急劇增加，達到 16 兆 8,280 億越南盾。

VHM (-2.6%) 在過去兩個交易日保持跌勢，則是對指數承受負面影響最大的股票。此外，VRE (-2.2%) 以及 HDB、VJC、PLX、GVR、MSN 下跌約 1%。另一方面，TPB (3.7%)、SAB (1.3%)、NLV (1.1%) 積極上漲。

投機性現金流依然活躍，如 ITA、CRE、TDH、DAG、DRH、DXS、EVG、GIL 等漲停。

外資在整個市場繼續賣超 4,740 億越南盾，其中 NVL (770 億)、EIB (710 億)、HPG (480 億) 被拋售最多的股票。另一方面，CTG (370 億)、PVS (210 億)、PVD (140 億) 在買超方面領先。

市場短期觀點

我們認為市場可能會在下個交易日調整，VN-Index 可能無法突破 1,080 – 1,085 點的阻力位。與此同時，VNMidcaps 的短期風險有所上漲，而 VNSmallcaps 大幅上漲至超買區域，顯示則在未來幾個交易日可能會增加調整的壓力，投資者應限制買進該兩檔股票。此外，短期情緒指標繼續大幅上漲，顯示投資者對當前市場走勢仍持樂觀態度。

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水平的股票比例，並限制在中小型股買進新股。

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	1075.17	-0.27%
VN30	1066.33	-0.51%
VN Mid	1395.63	0.11%
VN Small	1299.35	0.81%

**河內交易所 (HSX)**

	收盤	漲跌%
HNI	222.81	0.67%
HN30	418.9	0.12%
VNX AllSh	1042.2	-0.23%

**UPCOM 市場 (UPCoM)**

	收盤	漲跌%
UPCoM	82.05	0.47%

外資交易	成交值 (Bil.VND)
買進	760.04
賣出	1212.57
買超/賣超	-452.52

外資交易	成交值 (Bil.VND)
買進	28.69
賣出	7.47
買超/賣超	21.22

外資交易	成交值 (Bil.VND)
買進	8.50
賣出	51.01
買超/賣超	-42.51

上漲排名/ 股碼	漲跌(VND)	漲跌%
NHH	1050	7.00%
DXS	510	6.94%
DRH	430	6.92%
CRE	590	6.91%
LSS	800	6.81%

上漲排名/ 股碼	漲跌(VND)	漲跌%
HTP	3400	9.86%
PSD	1200	8.28%
VC7	900	6.29%
AMV	200	4.17%
PVI	1400	2.85%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PXL	1086	13.92%
VEF	8012	6.76%
VAB	414	5.45%
AAS	697	5.45%
TCI	466	4.96%

下跌排名/ 股碼	漲跌(VND)	漲跌%
HHP	-550	-4.89%
NHA	-500	-2.33%
HDB	-400	-2.13%
ORS	-300	-2.12%
DHG	-2100	-1.87%

下跌排名/ 股碼	漲跌(VND)	漲跌%
PLC	-1100	-2.93%
DVM	-400	-2.44%
EVS	-300	-2.36%
SHS	-200	-1.69%
MBS	-200	-1.08%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ABW	-1274	-9.04%
TVP	-1700	-6.14%
PGB	-1222	-4.48%
BSR	-135	-0.78%
ABB	-54	-0.63%

\*備註: 市值>5,000 億盾; 成交值>15 億盾

市值排名/ 股碼	Bil.VND
BID	221,563
GAS	177,806
HPG	124,146
MSN	103,647
#N/A	#N/A

市值排名/ 股碼	Bil.VND
PVS	14,626
THD	13,965
IDC	13,794
PVI	11,501
BAB	11,335

市值排名/ 股碼	Bil.VND
ACV	168,846
BSR	53,657
MCH	53,012
VEA	50,787
SSH	24,645

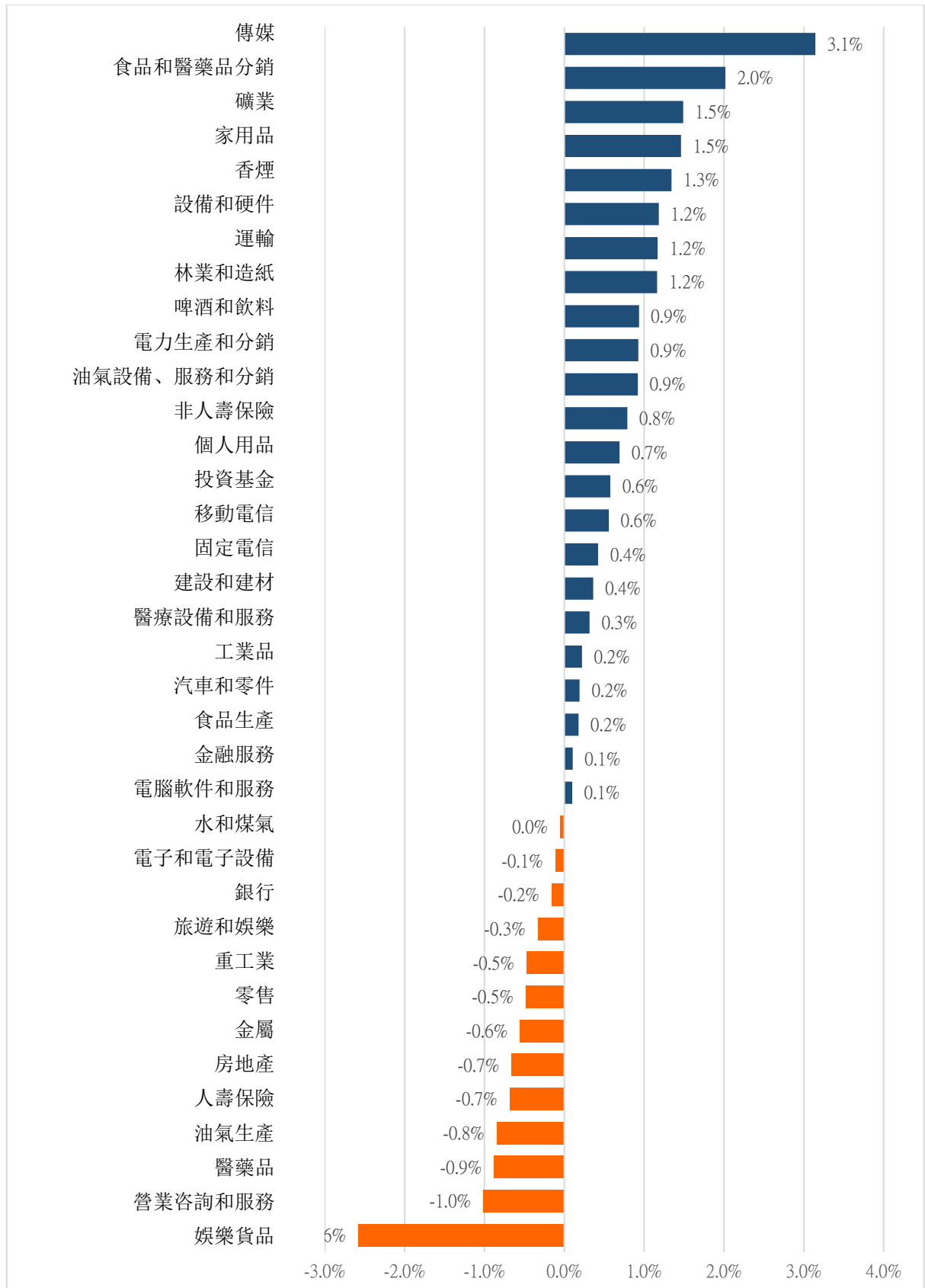
交易量排名/ 股碼	成交值	30 日均
VND	38,028,200	25,910,860
ACB	31,762,600	6,935,034
HAG	24,059,100	11,418,700
DIG	21,736,000	23,296,823
BCG	19,589,600	8,663,535

交易量排名/ 股碼	成交值	30 日均
SHS	22,383,835	20,065,489
PVS	8,106,187	6,955,838
HUT	6,264,270	2,437,064
AMV	5,450,714	2,535,326
LIG	4,022,162	2,098,371

交易量排 名/股碼	成交值	30 日均
VHG	15,426,266	3,319,719
BSR	9,516,048	7,491,799
NAB	5,410,112	330,652
LMH	4,402,450	1,211,722
SBS	3,912,101	4,323,693

資料源: Bloomberg & Yuanta Research

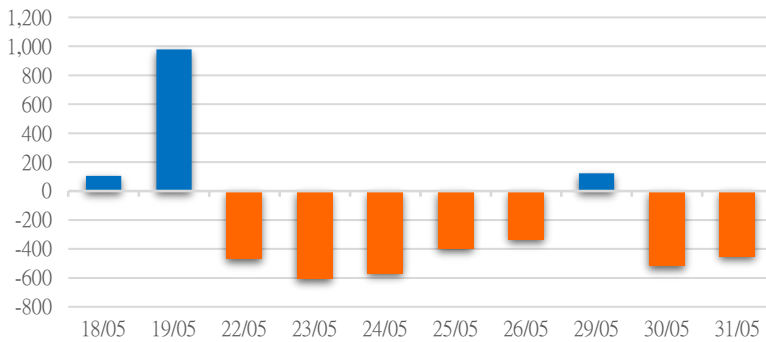
各行業板塊的交易走勢



資料源: FinPro – YSVN

外資買進賣統計

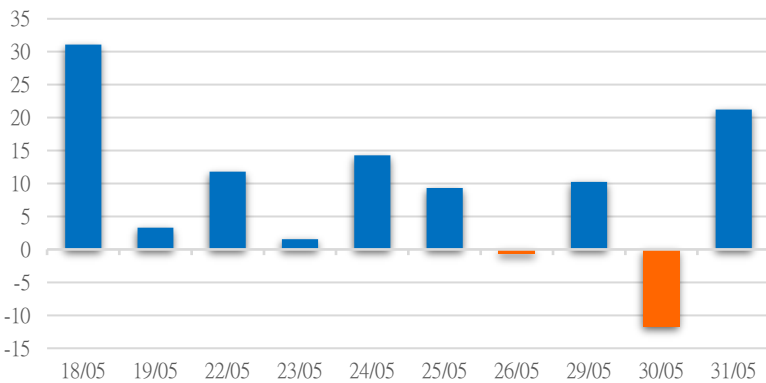
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVD	13,885	EIB	65,548
DGC	7,999	HPG	48,076
FCN	7,866	NLG	27,597
LHG	5,388	MSN	15,225
DIG	4,549	#N/A	#N/A

HSX 外資買/賣超的前 5 名

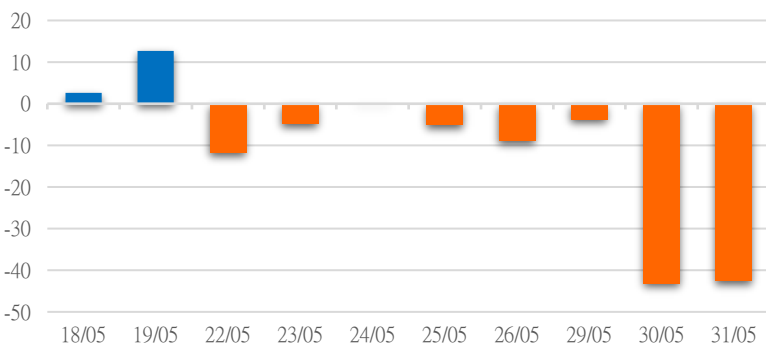
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	20,881	BVS	953
HVT	1,449	THD	560
PVI	1,413	SHS	372
BAB	141	NDX	161
PVG	140	PMB	97

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)
FOC	688	SKV	1,931
VHG	421	VTP	1,136
PHP	222	BSR	682
VGG	211	PVO	235
MCH	190	AAS	170

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)
CTG	101,564	BID	44,085
FUEVFNVD	37,473	VGC	16,868
E1VFN30	7,357	MSN	4,698
DXS	3,410	HDG	4,043
POW	3,015	BMC	3,753

HSX 自營交易最大前名

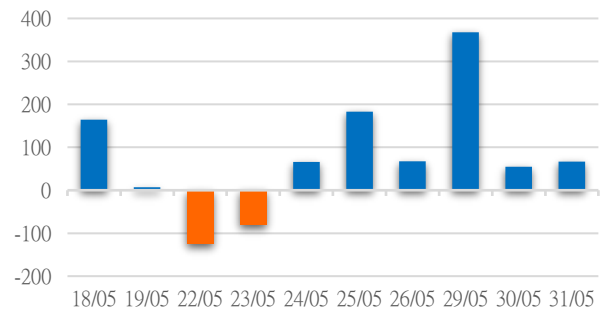
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PLC	143.78	S99	10,797
L18	37.30	IDC	4.2
		DL1	0.5

HNX 自營交易最大前名

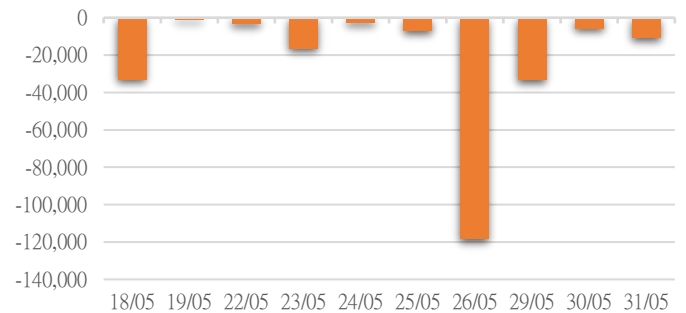
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DVN	199,647.26	VGG	294
NAB	50,500		
QNS	2,175		
MCH	827		

UPCoM 自營交易最大前名

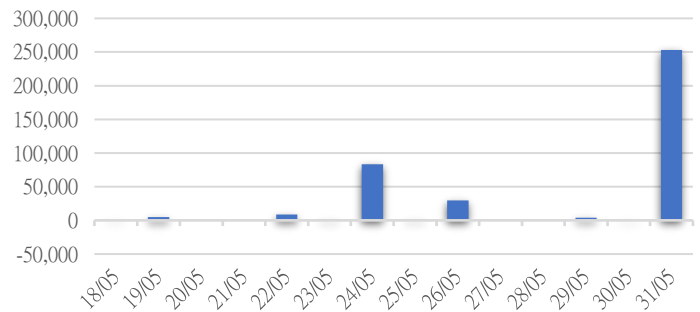
HSX 自營交易每日買/賣超 (BiL.VND)



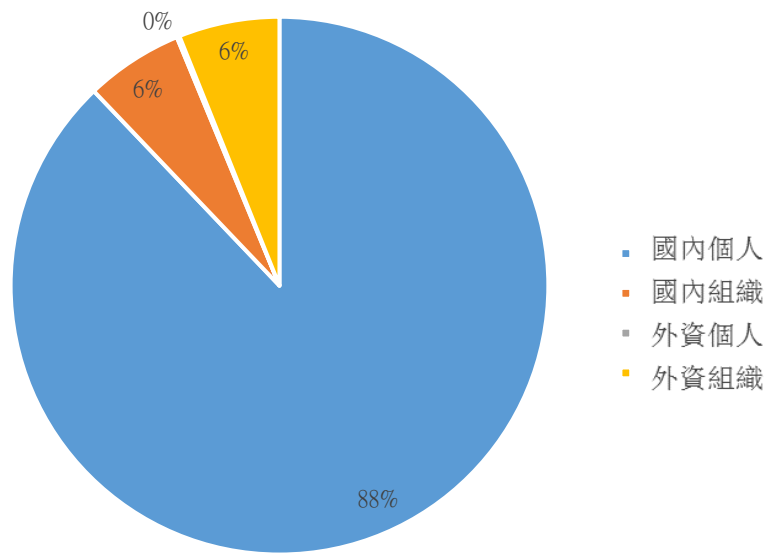
HNX 自營交易每日買/賣超 (Mil.VND)



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: FiiPro – YSVN

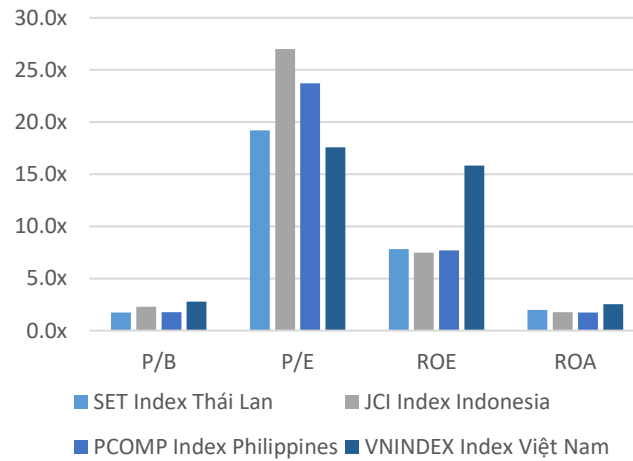
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.5x	1.9x	1.6x	1.7x
P/E		20.8x	14.4x	13.9x	14.7x
ROE	%	8.29	11.90	10.92	12.84
ROA	%	2.13	3.37	2.40	2.04
Vốn hóa	Tỷ USD	540.67	629.03	165.14	183.05
GTGD	Triệu USD	1.21	0.57	0.06	0.58
LS cổ tức	%	3.18	4.11	2.51	1.82

源: Bloomberg & YSVN





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