

當日市場：上漲趨勢在尾盤收窄

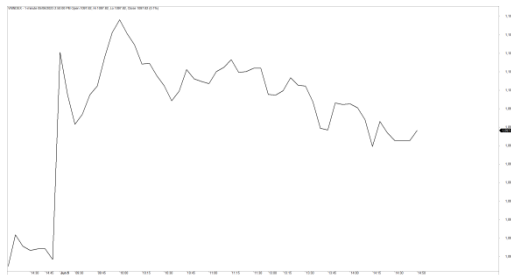
2023/06/06

市場走勢

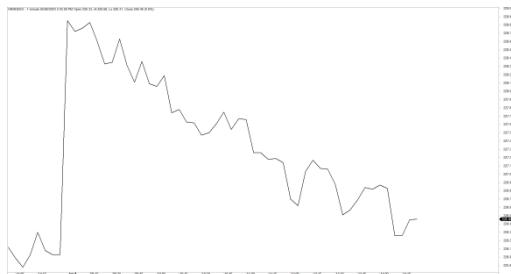
市場指數	VNI	HNI	UPCOM
收盤	1,097.82	226.56	84.11
%日	0.64%	0.23%	0.18%
%週	2.12%	2.84%	3.67%
%月	5.53%	9.03%	8.45%
%年	-14.76%	-27.03%	-10.68%
<b>成交值(Bil.VND)</b>			
當日	9,763	1,044	442
日均量/週	16,394	1,855	1,016
日均量/月	12,944	1,620	715
<b>外資進出</b>			
買進	716.14	22.48	8.51
賣出	828.90	7.12	58.93
買賣超	-112.76	15.36	-50.42
<b>市場漲跌家數</b>			
上漲	138	97	149
下跌	305	100	107
持平	56	73	84
<b>市場指標</b>			
P/E	12.93	17.60	13.43
總市值 (兆盾)	4,383	281	1,048
股息殖利率	3.46%	1.56%	6.25%

資料源: Bloomberg – YSVN

VNINDEX



HNIINDEX



市場走勢

儘管許多股票面臨強大的獲利壓力，但市場在本周的首個交易日繼續上漲。VN-Index 收盤上漲 0.64%，止於 1097.82 點，HNX-Index 和 Upcom-Index 分別上漲 0.23% 和 0.18%。3 大市場的交易額均保持在 18 兆 7,710 億越南盾的高位。

VCB (3.3%)、MSN (2.5%)、GAS (2.2%)、FPT (1.4%)、POW (2.2%) 是當日支撐市場的股票。另一方面，銀行股在寬幅上被獲利，但跌幅不大。此外，銀行，證券和房地產也出現調整壓力。

現金流流入 DGC、DPM、DCM 等化工股和 VOS、HAH、PVT 等運輸海港股和 MSN、SAB 等食品股積極上漲。

外資在整個市場繼續賣超近 1,480 億越南盾，其中 VNM (970 億)、HCM (320 億)、CTG (320 億) 被拋售最多的股票。另一方面，VHM (490 億)、SSI (350 億)、KBC (250 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 可能會重新測試 1,090 – 1,095 點的支撐位，這也是 2023 年 6 月 5 日形成的上漲缺口。同時，我們評估中小型股的調整壓力可能會增加，因此投資者應在當前價格區間內限制買進這兩個板塊的股票。此外，短期情緒指標繼續小幅上漲，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在當前水平繼續持有股票比例，並在短期機會逐漸減少、指數接近強勁阻力位時在下個交易日限制增加股票比例。

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	1097.82	0.64%
VN30	1091.08	0.38%
VN Mid	1432.36	0.20%
VN Small	1308.3	0.00%

**河內交易所 (HSX)**

	收盤	漲跌%
HNI	226.56	0.23%
HN30	418.28	-0.33%
VNX AllSh	1066.09	0.30%

**UPCOM 市場 (UPCoM)**

	收盤	漲跌%
UPCoM	84.11	0.18%

外資交易	成交值 (Bil.VND)
買進	716.14
賣出	828.9
買超/賣超	-112.76

外資交易	成交值 (Bil.VND)
買進	22.48
賣出	7.12
買超/賣超	15.36

外資交易	成交值 (Bil.VND)
買進	8.51
賣出	58.93
買超/賣超	-50.42

上漲排名/ 股碼	漲跌(VND)	漲跌%
HAH	2800	6.99%
CMG	2850	6.92%
VOS	800	6.72%
DPR	3800	6.71%
DGC	2800	4.97%

上漲排名/ 股碼	漲跌(VND)	漲跌%
NVB	1400	9.40%
TVD	1300	8.02%
API	800	5.37%
LAS	400	3.70%
TNG	600	3.02%

上漲排名/ 股碼	漲跌(VND)	漲跌%
KLB	1532	11.18%
BDT	905	6.33%
SGP	951	6.14%
PGB	1180	4.49%
PAT	3183	4.13%

下跌排名/ 股碼	漲跌(VND)	漲跌%
SGR	-1600	-6.36%
EVE	-950	-5.23%
KPF	-460	-5.13%
VRC	-400	-3.70%
CTS	-700	-3.61%

下跌排名/ 股碼	漲跌(VND)	漲跌%
NDN	-600	-6.25%
DDG	-300	-3.26%
BVS	-800	-3.21%
PSD	-400	-2.58%
BCC	-300	-2.24%

下跌排名/ 股碼	漲跌(VND)	漲跌%
AMS	-412	-3.46%
G36	-286	-3.14%
VHG	-70	-2.06%
TID	-494	-2.02%
DSC	-428	-2.00%

\*備註: 市值>5,000 億盾; 成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	449,116
VHM	232,523
BID	226,116
VIC	198,325
GAS	176,083

市值排名/ 股碼	Bil.VND
PVS	14,817
THD	13,965
IDC	13,860
KSF	12,840
BAB	11,918

市值排名/ 股碼	Bil.VND
ACV	169,325
VGI	72,604
MCH	52,963
BSR	52,895
VEA	51,249

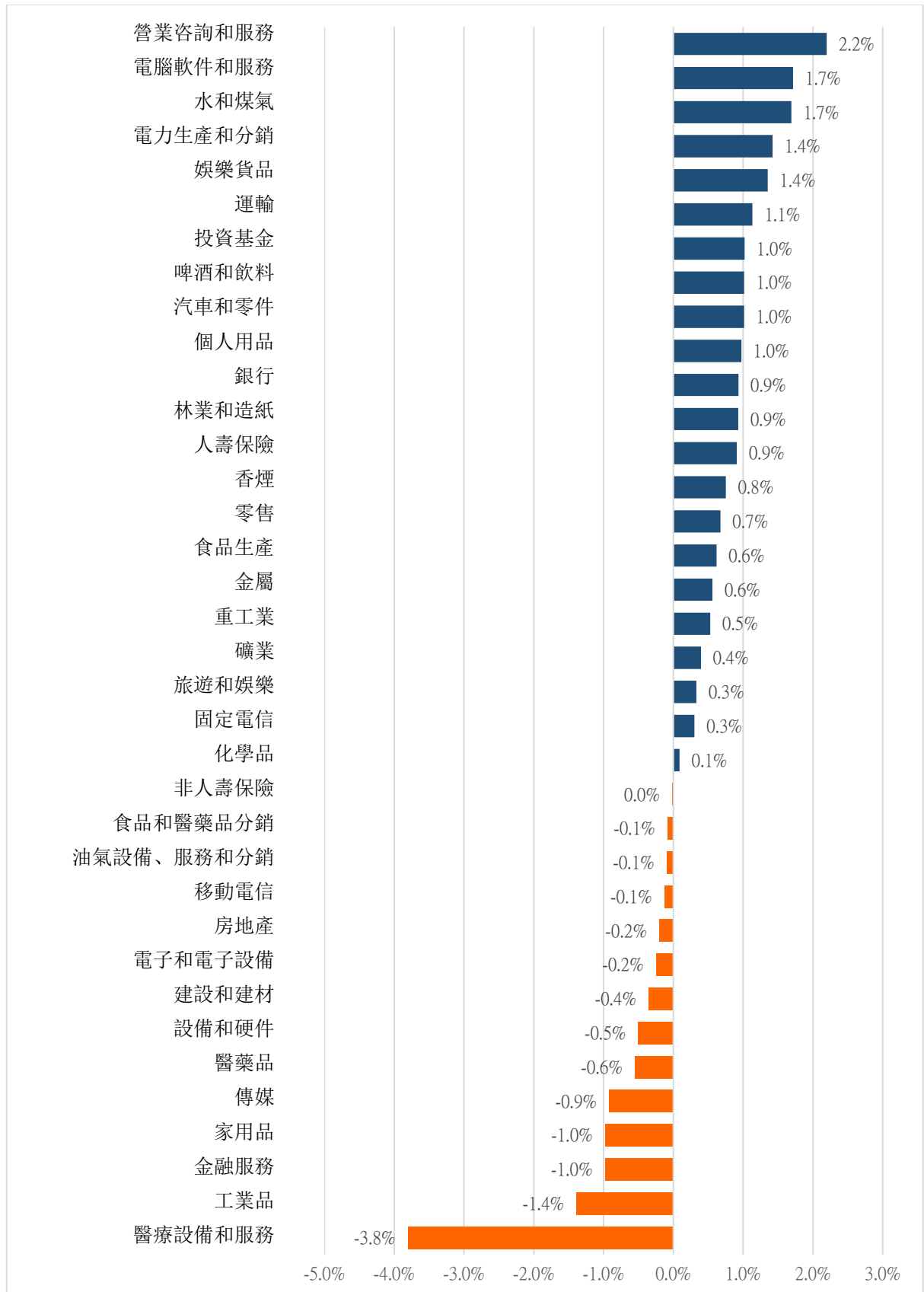
交易量排名/ 股碼	成交值	30 日均
SHB	50,781,100	21,468,732
VND	38,173,900	27,132,979
DXG	29,658,400	18,451,173
NVL	25,723,400	19,129,071
HSG	24,917,400	14,124,402

交易量排名/ 股碼	成交值	30 日均
SHS	20,143,460	20,333,680
CEO	7,397,408	7,957,400
HUT	5,132,318	2,560,229
PVS	4,966,435	7,021,583
IDJ	4,370,822	3,935,533

交易量排 名/股碼	成交值	30 日均
BSR	14,978,859	7,832,561
VHG	3,635,766	4,268,873
ABB	3,120,955	2,124,892
SBS	2,821,738	4,266,557
KVC	2,528,508	3,448,726

資料源: Bloomberg & Yunta Research

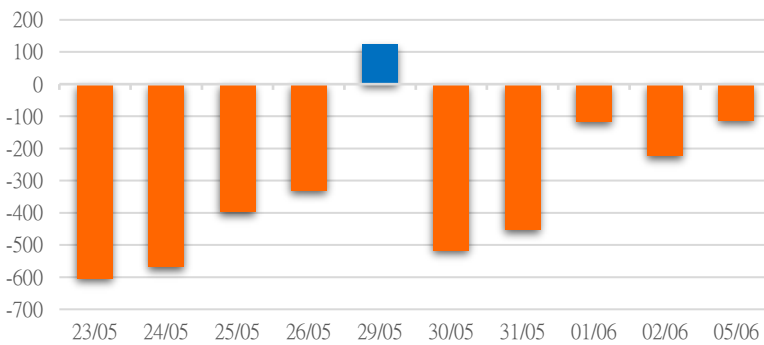
各行業板塊的交易走勢



資料源.: FinPro – YSVN

外資買進賣統計

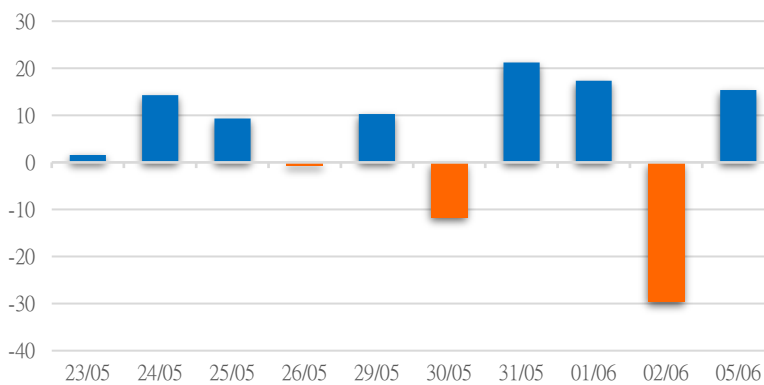
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VHM	49,886	VNM	97,216
SSI	35,156	HCM	32,331
KBC	25,173	CTG	32,072
VCB	19,450	MSN	28,232
CTD	15,827	NLG	19,159

HSX 外資買/賣超的前 5 名

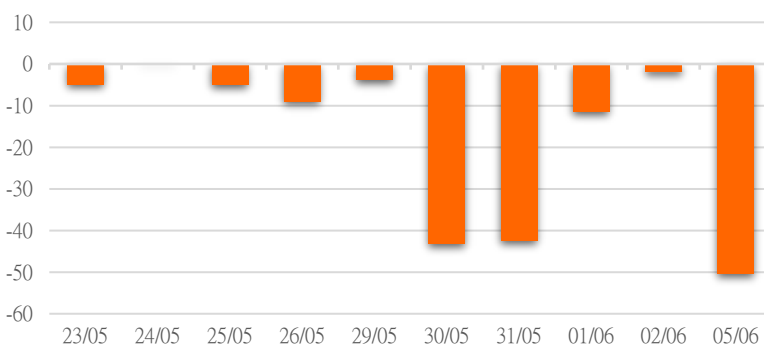
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	15,741	NVB	1,628
PLC	1,120	SD5	890
IDC	899	BVS	756
CEO	818	NDX	406
DDG	267	THD	292

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)
BVB	2,136	BSR	26,236
MCH	732	MPC	13,727
PHP	401	VTP	3,641
VLC	346	QNS	3,473
CSI	169	ABI	2,082

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)
ACB	44,395	VGC	43,356
VIX	19,940	HPG	21,464
MBB	16,703	VNM	18,048
FUEVFNVD	15,716	STB	15,826
DGC	12,918	VRE	13,815

HSX 自營交易最大前名

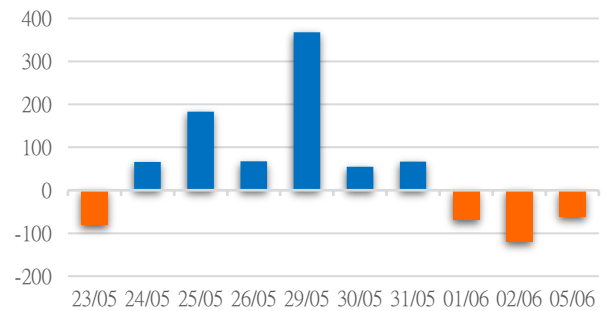
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MST	610.00	BED	0
PVS	610.00		
IDC	210.00		
PLC	37.30		

HNX 自營交易最大前名

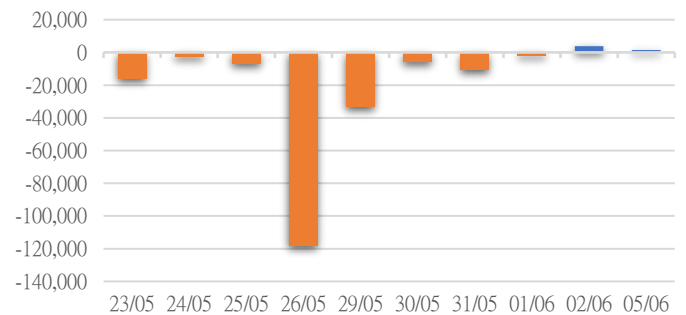
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
QTP	1,498.50	BDT	9,134
		BSR	2,640
		SIP	277.8

UPCoM 自營交易最大前名

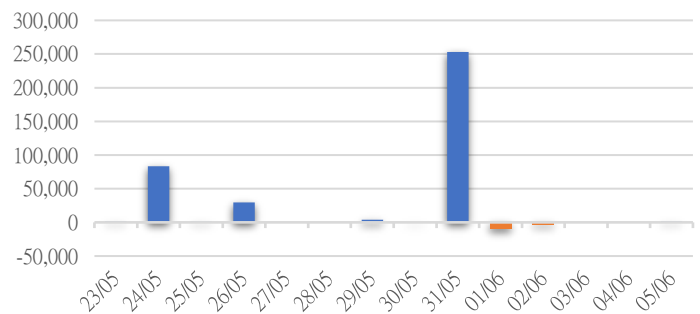
HSX 自營交易每日買/賣超 (Bil.VND)



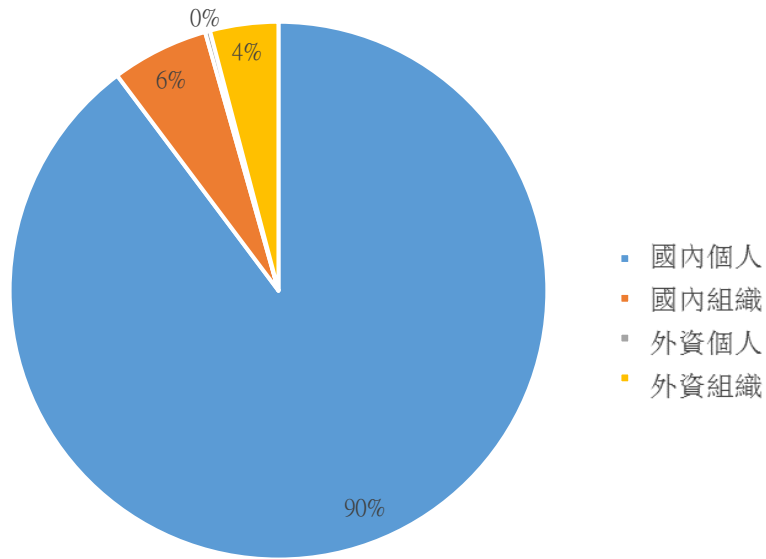
HNX 自營交易每日買/賣超 (Mil.VND)



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

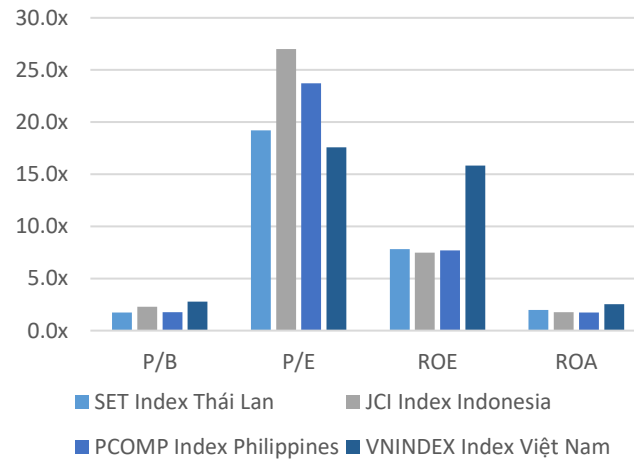
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.5x	1.9x	1.6x	1.7x
P/E		20.8x	14.5x	13.9x	14.9x
ROE	%	8.26	11.76	10.89	12.84
ROA	%	2.14	3.33	2.39	2.03
Vốn hóa	Tỷ USD	541.73	629.56	164.97	185.14
GTGD	Triệu USD	1.10	1.80	0.06	0.72
LS cổ tức	%	3.17	4.08	2.50	1.86

源: Bloomberg & YSVN





## 元大證券（越南）公司

### 個人客戶分析部

**Nguyễn Thế Minh**  
研究分析經理  
+84 28 3622 6868 ext 3826  
minh.nguyen@yuanta.com.vn

**Lý Thị Hiền**  
研究分析主管  
+84 28 3622 6868 ext 3908  
hien.ly@yuanta.com.vn

**Quách Đức Khánh**  
研究分析副主管  
+84 28 3622 6868 ext 3833  
khanh.quach@yuanta.com.vn

**Khổng Hữu Hiệp**  
高級分析專員  
+84 28 3622 6868 ext 3912  
hiep.khong@yuanta.com.vn

**Nguyễn Trịnh Ngọc Hồng**  
高級分析專員  
+84 28 3622 6868 ext 3832  
hong.nguyen@yuanta.com.vn

**Phạm Tấn Phát**  
高級分析專員  
+84 28 3622 6868 ext 3880  
phat.pham@yuanta.com.vn

### 個人客戶業務部

**Phạm Đắc Thành**  
北部分行經理  
+84 28 3622 6868 ext 3416  
thanh.pham@yuanta.com.vn

**Võ Thị Thu Thủy**  
平陽分行經理  
+84 28 3622 6868 ext 3505  
thuy.vo@yuanta.com.vn

**Lương Kỳ Ty**  
堤岸分行經理  
+84 28 3622 6868 ext 3653  
ty.luong@yuanta.com.vn

**Bùi Quốc Phong**  
同奈分行經理  
+84 28 3622 6868 ext 3701  
phong.bui@yuanta.com.vn

**Võ Đình Tuấn**  
峴港分行經理  
+84 28 3622 6868 ext 3301  
tuan.vo@yuanta.com.vn

**Nguyễn Việt Quang**  
河內分行經理  
+84 28 3622 6868 ext 3404  
quang.nguyen@yuanta.com.vn

**Đinh Thị Thu Cúc**  
頭頓分行經理  
+84 28 3622 6868 ext 3203  
cuc.dinh@yuanta.com.vn

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