

當日市場：外資強勁買超

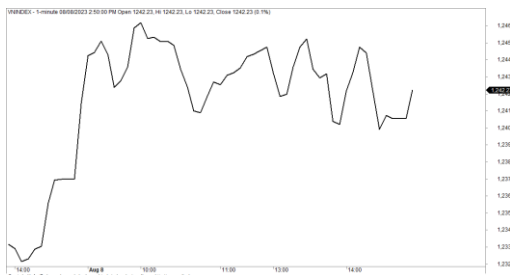
2023/08/09

市場走勢

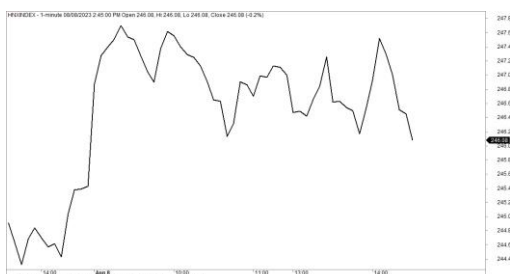
市場指數	VNI	HNI	UPCOM
收盤	1,242.23	246.07	93.64
%日	0.07%	0.16%	1.16%
%週	2.03%	2.81%	3.80%
%月	9.15%	8.97%	10.61%
%年	-1.16%	-18.34%	1.43%
成交值(Bil.VND)			
當日	9,763	1,044	442
日均量/週	22,670	2,029	1,519
日均量/月	20,348	1,872	1,361
外資進出			
買進	1,328.59	35.52	1,100.89
賣出	1,565.08	49.77	46.14
買賣超	-236.50	-14.26	1,054.75
市場漲跌家數			
上漲	138	108	149
下跌	305	84	107
持平	56	73	84
市場指標			
P/E	14.69	20.06	17.97
總市值 (兆盾)	4,986	308	1,118
股息殖利率	1.82%	2.95%	6.06%

資料源: Bloomberg – YSVN

VNINDEX



HNIINDEX



市場走勢

經過最近兩個大幅上漲的交易日後，當日的上漲勢頭有所放緩。VN-Index 收漲 0.07%，止於 1242.23 點，HNX-Index 和 Upcom-Index 同步上漲 0.16% 和 1.16%。3 大市場的交易額達到 25 兆 20 億越南盾。

市場的寬度為負，VN30-Index 有 18 檔下跌股和 9 檔上漲股。POW (2.9%)、PLX (1%)、MSN (1.1%) 以及 VIC (4.9%)、VRE (4.7%) 是對指數產生積極影響的股票。另一方面，ACB、HPG、SHB、SSI、TPB、TCB、VPB 在當日小幅調整。

投機性現金流在當日強勁參與，如 MHC、DAT、PCN、HHS、DBC、ITA、TNI 均漲停。

外資在整個市場買超 5,840 億越南盾，其中 SGB (8,720 億)、VIC (1,130 億)、MSN (830 億) 在買超方面領先。另一方面，GMD (2,450 億)、VRE (1,110 億)、HPG (750 億) 被拋售最多的股票。

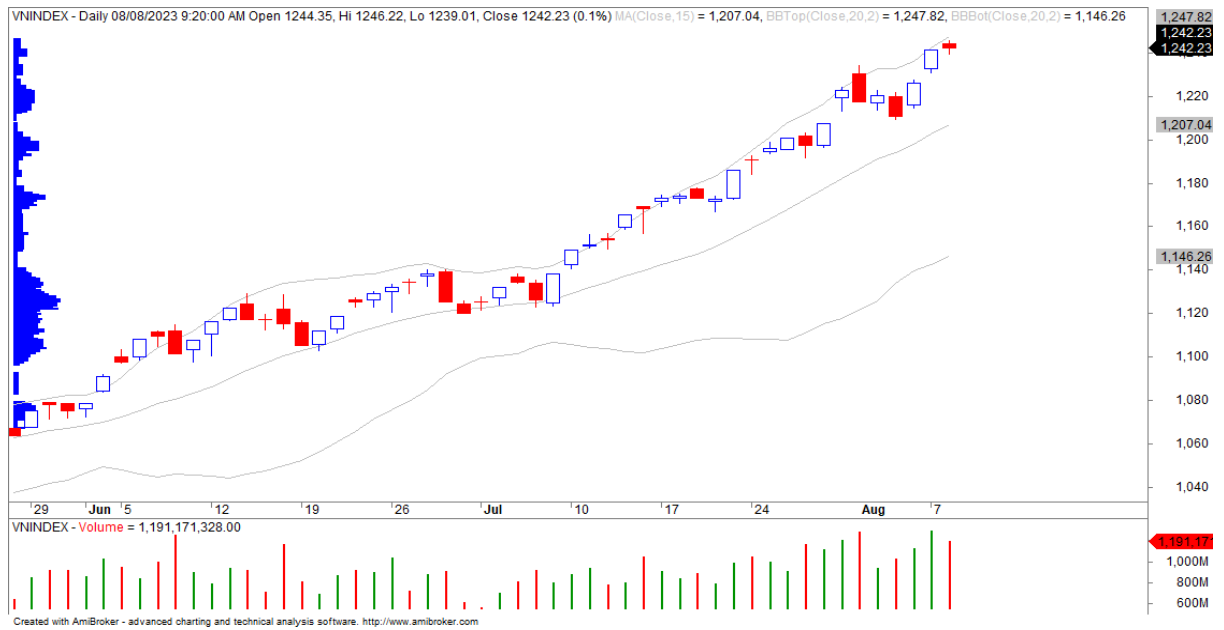
市場短期觀點

我們認為，儘管市場可能會出現調整，但市場可能會在下一個交易日繼續上漲。同時，調整幅度仍處於較低水平，顯示賣盤並不算太強勁，市場仍以謹慎的情緒上漲，市場的上漲動力主要依靠少數大型股。但市場仍處於積極劇烈波動的時期，現金流可能從中型股流入大型股。

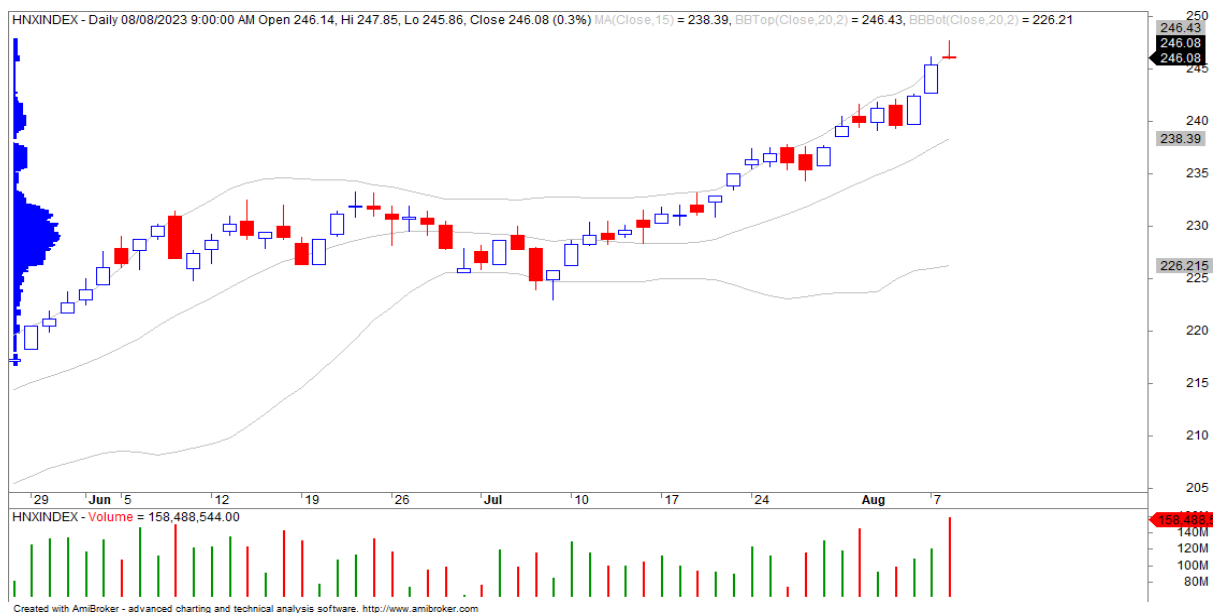
大盤的短期走勢依然上漲。因此，我們建議短期投資者可以繼續持有高比例的股票，但在 VN-Index 接近 1,260-1,265 點的阻力位時限制在當前時期買進新股。

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	1220	1300	870	800
HNX-Index	上漲	上漲	224	250	189	160
VN30	上漲	上漲	1240	1300	980	960
VNMidcaps	上漲	上漲	1230	1250	963	900
VNSmallcaps	上漲	上漲	1200	1250	804	750

胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1242.23	0.07%
VN30	1247.81	-0.23%
VN Mid	1682.66	-0.30%
VN Small	1442.4	0.18%

河內交易所 (HSX)

	收盤	漲跌%
HNI	246.07	0.16%
HN30	495.07	0.03%
VNX AllSh	1225.88	-0.22%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	93.64	1.16%

外資交易	成交值 (Bil.VND)
買進	1328.59
賣出	1565.08
買超/賣超	-236.5

外資交易	成交值 (Bil.VND)
買進	35.52
賣出	49.77
買超/賣超	-14.26

外資交易	成交值 (Bil.VND)
買進	1,100.89
賣出	46.14
買超/賣超	1,054.75

上漲排名/ 股碼	漲跌(VND)	漲跌%
HHS	450	6.93%
HPX	370	6.89%
DBC	1800	6.88%
ITA	400	6.87%
HAG	630	6.86%

上漲排名/ 股碼	漲跌(VND)	漲跌%
LIG	500	8.77%
DDG	500	5.68%
C69	600	5.36%
PVS	1700	4.96%
VC7	1100	4.23%

上漲排名/ 股碼	漲跌(VND)	漲跌%
VSF	4800	14.72%
ABW	1631	12.64%
VGX	1351	6.23%
VHG	158	4.39%
DGT	408	3.96%

下跌排名/ 股碼	漲跌(VND)	漲跌%
VIX	-800	-4.73%
CRE	-400	-3.67%
DHA	-1750	-3.40%
HDC	-1200	-3.26%
LCG	-450	-3.05%

下跌排名/ 股碼	漲跌(VND)	漲跌%
CSC	-1900	-4.69%
CEO	-600	-2.97%
NRC	-200	-2.74%
CAP	-1900	-2.57%
TIG	-300	-2.38%

下跌排名/ 股碼	漲跌(VND)	漲跌%
SGB	-1886	-8.69%
G36	-283	-2.64%
C4G	-352	-2.21%
DVN	-320	-1.53%
CST	-278	-1.46%

*備註: 市值>5,000 億盾; 成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	507,490
VHM	273,890
BID	247,109
VIC	243,710
GAS	193,118

市值排名/ 股碼	Bil.VND
PVS	16,394
IDC	15,939
THD	14,280
SHS	13,092
BAB	12,085

市值排名/ 股碼	Bil.VND
ACV	177,855
VGI	76,792
BSR	63,582
MCH	56,781
VEA	53,516

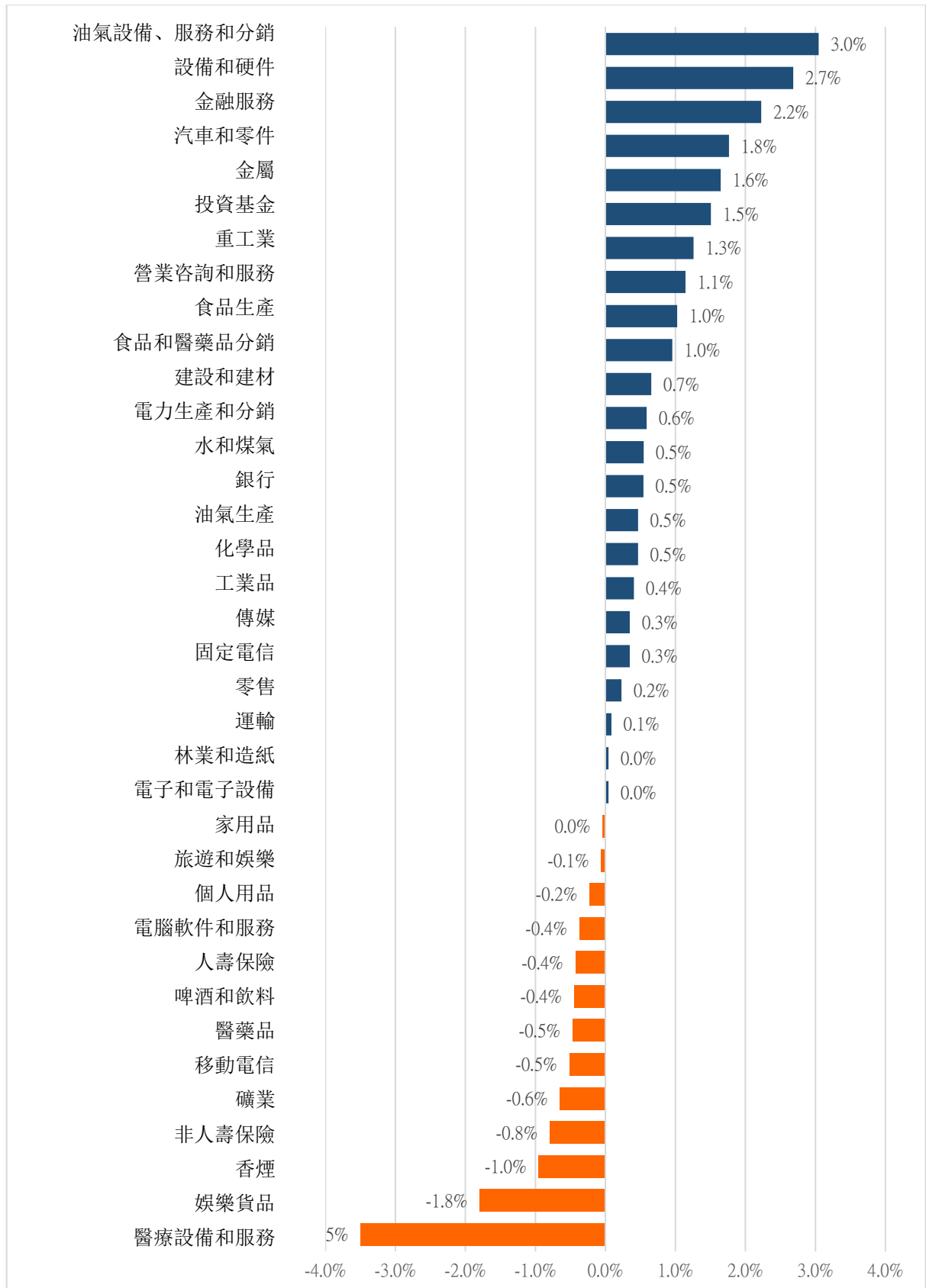
交易量排名/ 股碼	成交值	30 日均
HAG	47,248,500	18,465,971
NVL	44,248,900	46,001,225
VND	34,512,700	31,764,292
SHB	31,347,500	21,254,136
HQC	30,860,900	13,935,316

交易量排名/ 股碼	成交值	30 日均
PVS	21,750,373	5,247,482
SHS	17,369,132	18,148,386
CEO	9,661,819	10,597,207
MBG	8,027,546	2,599,035
LIG	8,007,223	1,636,633

交易量排 名/股碼	成交值	30 日均
SGB	58,139,025	184,838
BSR	8,123,416	10,256,778
VHG	7,149,815	2,672,010
ABB	6,025,271	2,959,230
C4G	5,686,703	4,271,265

資料源: Bloomberg & Yuanta Research

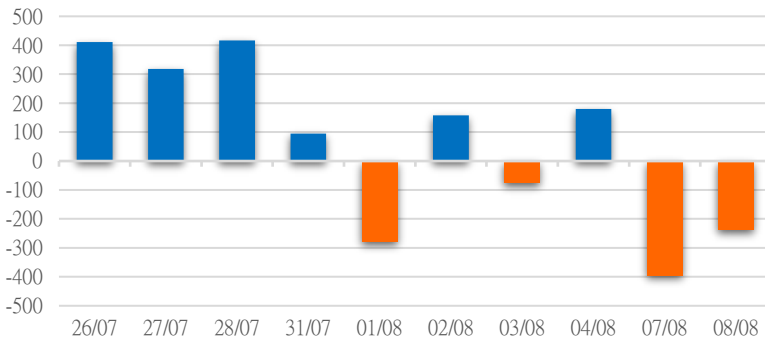
各行業板塊的交易走勢



資料源: FinPro - YSVN

外資買進賣統計

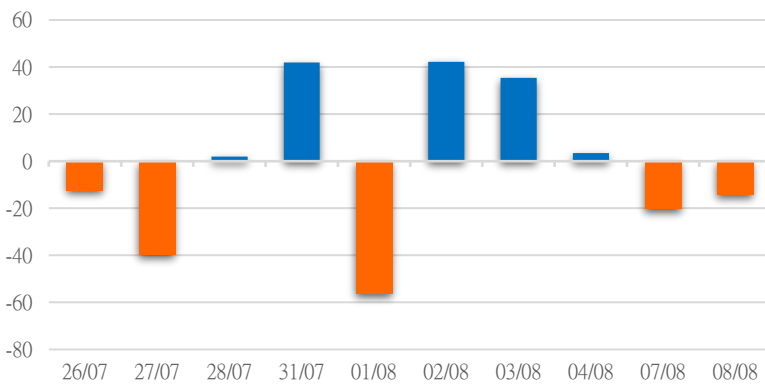
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VIC	112,788	GMD	243,271
MSN	83,332	VRE	111,784
CTG	81,999	HPG	74,710
MWG	81,078	CTD	60,968
VNM	36,025	VND	42,597

HSX 外資買/賣超的前 5 名

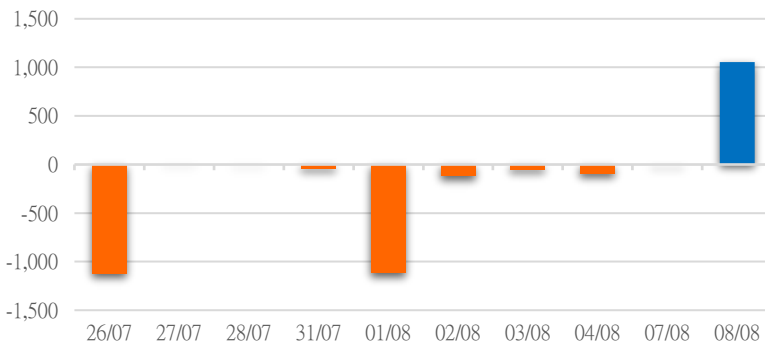
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SHS	27,888	CEO	28,711
HUT	1,122	PTI	6,188
IDC	877	TNG	4,789
VNR	360	NVB	1,693
IDJ	273	MBG	1,313

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)
SGB	1,091,200	VEA	28,786
MPC	2,709	QNS	10,844
QTP	2,420	VGT	2,384
BSR	2,080	MCM	786
MCH	766	ABB	517

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)
E1VFN30	39,874	VNM	61,228
FUEVFN30	23,229	ACB	45,885
DBC	12,445	MBB	30,535
SSB	8,664	VPB	24,089
VIC	8,300	STB	22,336

HSX 自營交易最大前名

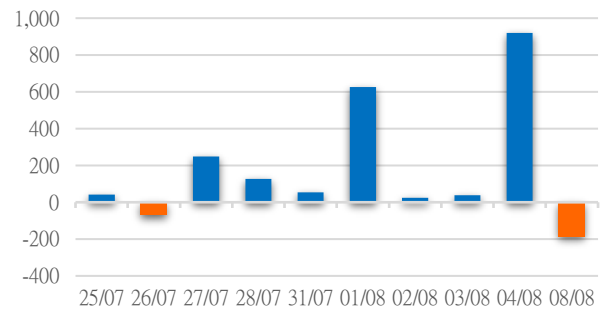
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	4,753.74	PVS	23,078
PLC	117.00	PVC	396.0
L18	39.20	PSI	0.7
		ALT	0.1
		VDL	0.0

HNX 自營交易最大前名

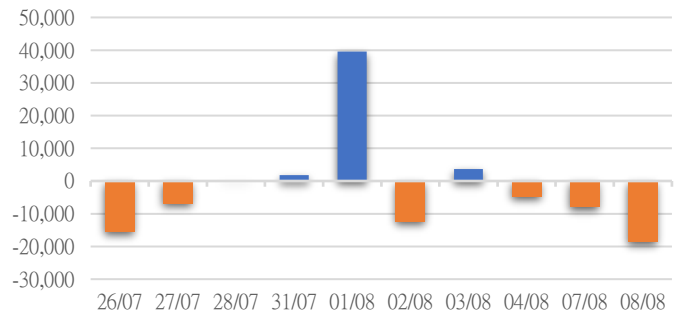
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
NAB	2,727.72	DDV	102
QTP	1,720	VFC	0
BSR	914	PXL	0.0
VLC	354		

UPCoM 自營交易最大前名

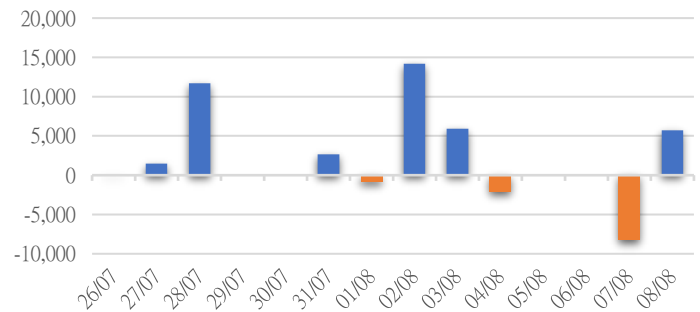
HSX 自營交易每日買/賣超 (BiL.VND)



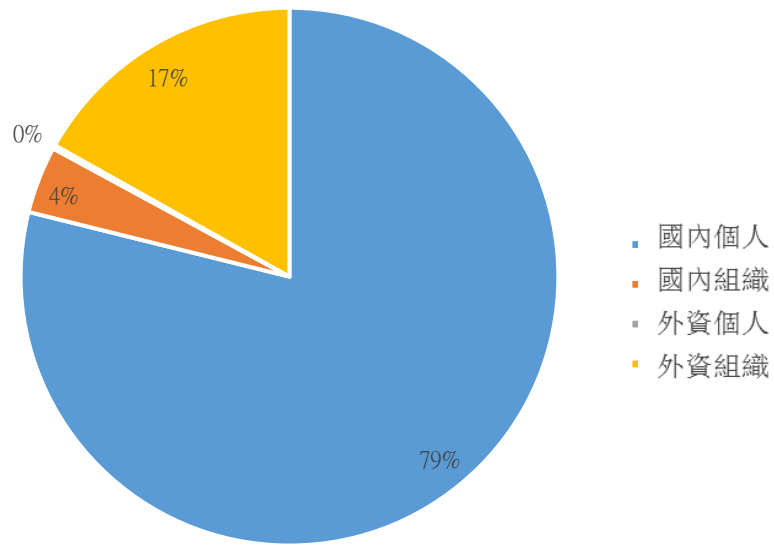
HNX 自營交易每日買/賣超 (Mil.VND)



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

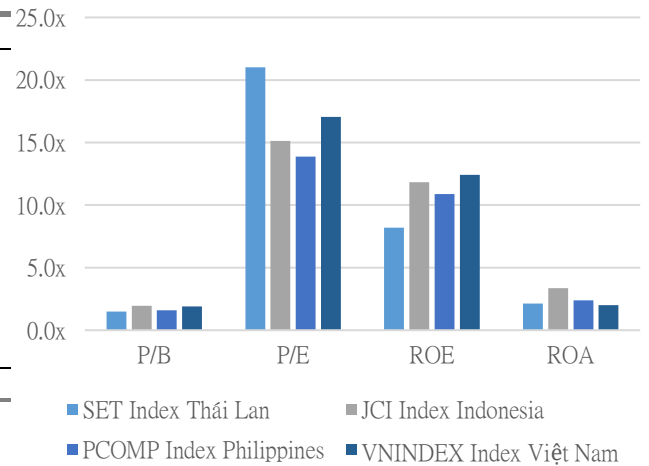
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.5x	1.9x	1.6x	1.9x
P/E		21.0x	15.1x	13.9x	17.1x
ROE	%	8.19	11.83	10.89	12.41
ROA	%	2.13	3.36	2.40	1.99
Vốn hóa	Tỷ USD	535.76	660.14	165.13	208.58
GTGD	Triệu USD	1.23	0.47	0.05	0.92
LS cổ tức	%	3.18	4.01	2.54	1.55

源: Bloomberg & YSVN



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