

當日市場：市場在臨近尾盤時反轉上漲

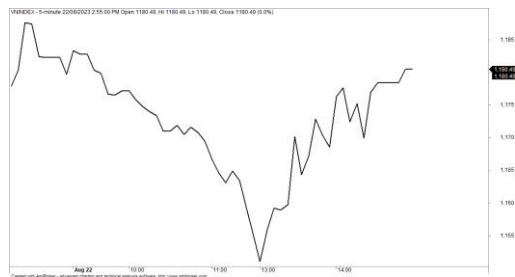
2023/08/23

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,180.49	239.65	89.51
%日	0.06%	0.71%	0.01%
%週	-4.34%	-4.69%	-4.26%
%月	-0.46%	1.99%	1.54%
%年	-6.34%	-18.69%	-2.94%
成交值(Bil.VND)			
當日	9,763	1,044	442
日均量/週	25,239	2,606	1,315
日均量/月	22,647	2,172	1,381
外資進出			
買進	1,536.09	37.84	9.52
賣出	2,261.14	25.47	4.57
買賣超	-725.04	12.37	4.96
市場漲跌家數			
上漲	138	46	149
下跌	305	36	107
持平	56	73	84
市場指標			
P/E	14.02	19.38	17.37
總市值 (兆盾)	4,748	298	1,075
股息殖利率	1.84%	3.14%	5.51%

資料源: Bloomberg – YSVN

VNINDEX



HNIINDEX



市場走勢

指數在午盤大幅下跌後，指數重新上漲。儘管漲幅不大，但盤中的復甦幅度相當強勁。具體而言，VN-Index 在下跌近 1149 點後收於 1,180.49 點，相當於上漲 0.06%，HNX-Index 同步上漲 0.71%，Upcom-Index 上漲 0.01%。3 大市場的交易額均達到 22 兆 4,280 億越南盾。

漲幅在寬幅內出現，其中 SSI、SSB 等金融股上漲 6% 以上，並引領復甦。此外，BVH、HDB、GAS、STB、TCB 也小幅上漲。另一方面，SAB、GVR、POW、VPB、VCB、VIC 收跌。

外資在整個市場反轉賣超超過 7,080 億越南盾，其中 HPG (2,660 億)、STB (1,990 億)、VPB (990 億) 被拋售最多的股票。另一方面，VIC (360 億)、DGW (350 億)、VCI (330 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一個交易日復甦，VN-Index 可能會重新測試 1,200 點。同時，技術指標下跌至超賣區域，顯示需求在未來幾個交易日可能會增加，但短期風險仍然較高，目前也不是安全的超買區域。然而，積極點是，當 VN-Index 的價格走勢圖有兩次測試該阻力位時，VN-Index 可能保持在 1,160 點的支撐位。此外，多檔股票在強勁的支撐位被大幅折價，並在短期內出現放緩下跌趨勢的跡象，因此 VN-Index 在 1,160 點的支撐位被認為是短期下跌趨勢的重要支撐位。大盤的短期走勢仍然下跌。因此，在短期內，我們建議投資者可以持有當前的投資組合，並在當前價格區間停止拋售。同時，投資者可以考慮以低比例的股票探索買進。

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

胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1180.49	0.06%
VN30	1193.51	0.27%
VN Mid	1614.46	1.22%
VN Small	1356.09	0.94%

河內交易所 (HSX)

	收盤	漲跌%
HNI	239.65	0.71%
HN30	489.69	1.08%
VNX AllSh	1172.12	0.57%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	89.51	0.01%

外資交易	成交值 (Bil.VND)
買進	1536.09
賣出	2261.14
買超/賣超	-725.04

外資交易	成交值 (Bil.VND)
買進	37.84
賣出	25.47
買超/賣超	12.37

外資交易	成交值 (Bil.VND)
買進	9.52
賣出	4.57
買超/賣超	4.96

上漲排名/ 股碼	漲跌(VND)	漲跌%
ELC	1500	6.80%
SSI	1850	6.41%
VCI	2100	5.20%
APG	460	5.05%
HAG	420	4.90%

上漲排名/ 股碼	漲跌(VND)	漲跌%
SHS	800	5.13%
IDC	1800	4.13%
MBS	700	4.02%
BVS	900	3.57%
DXP	400	3.33%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DGT	102	1.19%
MCH	714	0.91%
VTP	219	0.56%
AMS	42	0.38%
VNZ	2895	0.26%

下跌排名/ 股碼	漲跌(VND)	漲跌%
SBT	-400	-2.72%
CSV	-700	-1.99%
SAB	-2700	-1.77%
TDC	-200	-1.61%
TNH	-350	-1.45%

下跌排名/ 股碼	漲跌(VND)	漲跌%
DNP	-800	-3.20%
AMV	-100	-2.13%
NTP	-400	-1.03%
DHT	-200	-0.87%
VC7	-200	-0.75%

下跌排名/ 股碼	漲跌(VND)	漲跌%
PXL	-434	-4.13%
BDG	-972	-3.56%
TCI	-254	-2.19%
SGP	-369	-2.05%
MSR	-315	-2.05%

*備註: 市值>5,000 億盾; 成交值>15 億盾

市值排名/ 股碼	Bil.VND
BID	230,669
GAS	189,672
HPG	152,347
FPT	109,090
SAB	97,924

市值排名/ 股碼	Bil.VND
PVS	15,677
IDC	14,388
THD	14,014
SHS	12,685
BAB	11,585

市值排名/ 股碼	Bil.VND
ACV	169,741
BSR	58,736
MCH	56,268
VEA	49,139
VNZ	31,938

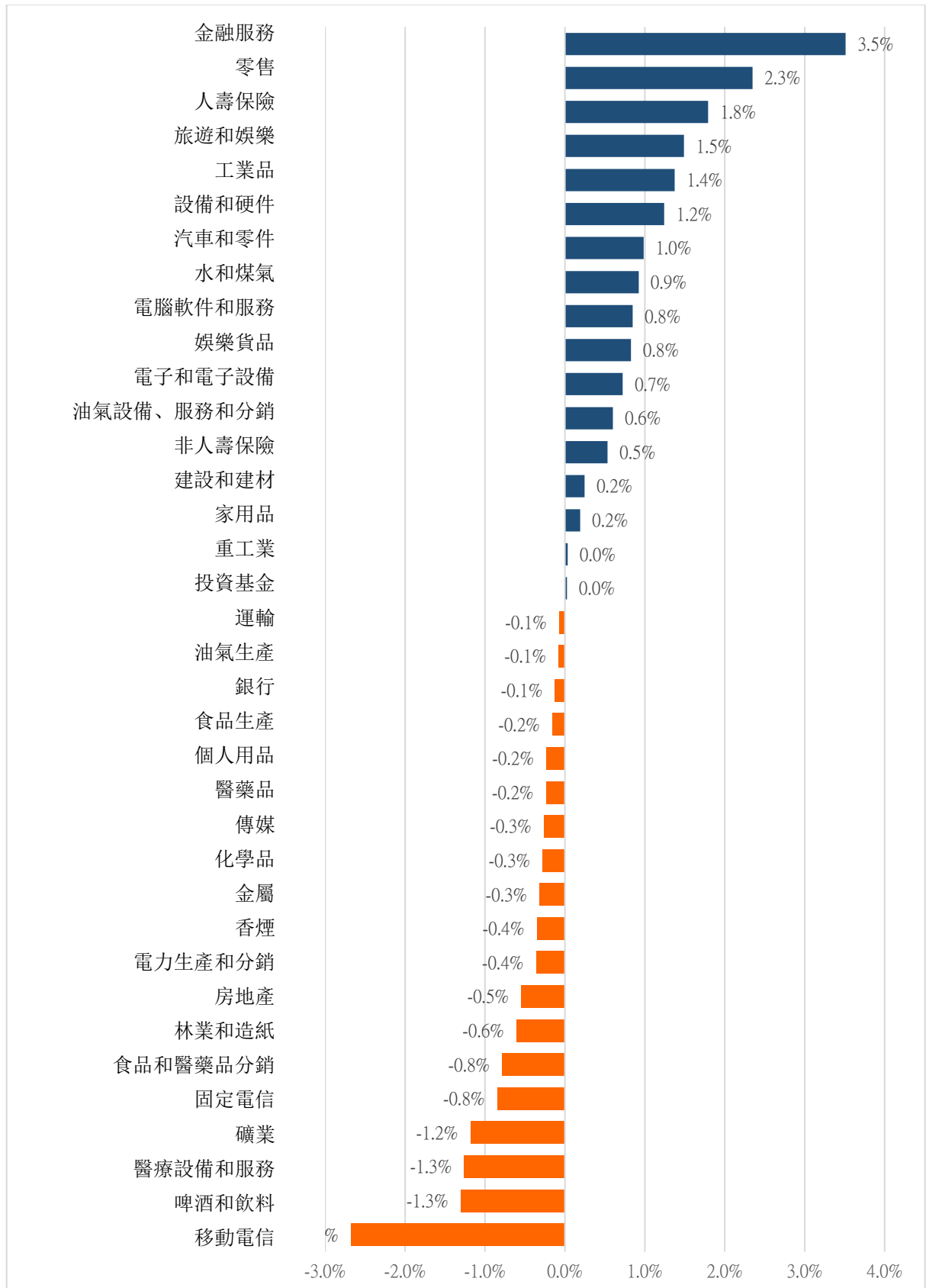
交易量排名/ 股碼	成交值	30 日均
SSI	51,920,611	20,855,811
VND	42,946,200	34,903,549
VIX	41,746,900	28,034,423
HPG	37,542,815	29,090,714
DIG	23,161,200	29,827,939

交易量排名/ 股碼	成交值	30 日均
SHS	33,407,902	19,887,023
HUT	5,258,694	4,852,138
APS	5,146,833	2,891,405
PVS	4,329,512	7,028,101
MBS	4,135,476	3,488,199

交易量排 名/股碼	成交值	30 日均
DGT	14,617,000	2,030,919
BSR	7,580,376	11,012,228
SBS	4,082,376	3,898,048
ABB	1,980,614	3,411,988
VHG	1,886,446	3,204,493

資料源: Bloomberg & Yuanta Research

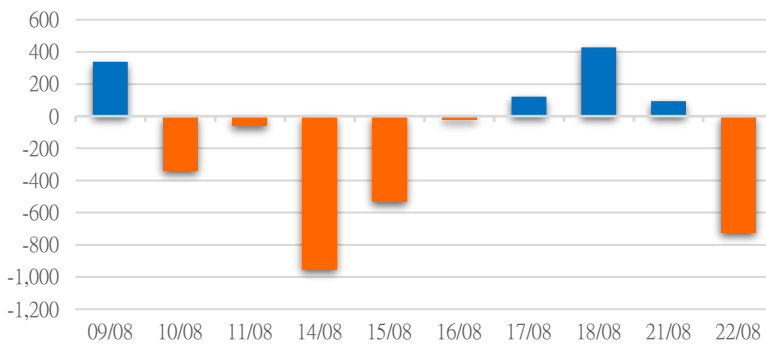
各行業板塊的交易走勢



資料源: FinPro - YSVN

外資買進賣統計

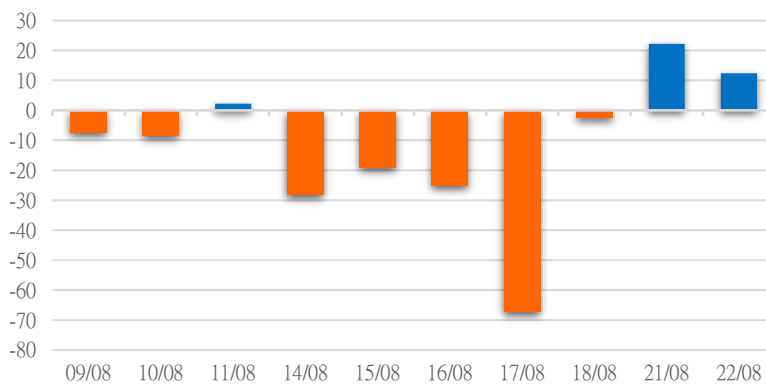
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VCI	32,608	HPG	266,536
FRT	30,589	FUEVFN30	51,459
KDH	11,789	VND	43,069
GMD	8,690	SAB	39,425
E1VFN30	8,583	SSI	22,007

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)
IDC	16,945	NVB	1,401
BVS	2,797	THD	1,054
PVS	1,096	L14	970
PPP	571	MBS	354
SHS	396	DHT	145

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)
VTP	1,989	RIC	291
BSR	1,376	CSI	149
BDG	941	ACV	101
MCH	334	DDV	90
VEA	147	LCM	78

UPCOM 外資買/賣超的前 5 名

源: FinPro - 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)
FUEVFNVD	122,471	FPT	13,177
EIB	49,414	DGC	7,858
SSI	48,262	DBC	6,388
VNM	30,272	AAA	6,355
HPG	26,092	REE	4,811

HSX 自營交易最大前名

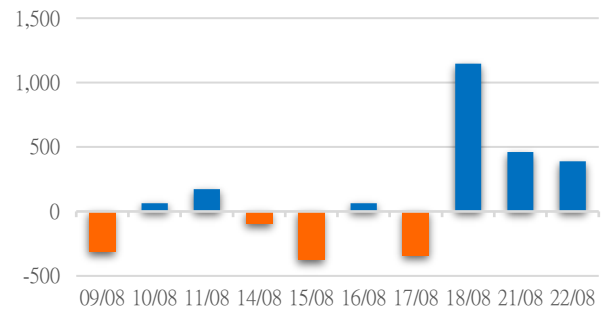
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PLC	16.50	IDC	6,857
		PCG	19.2

HNX 自營交易最大前名

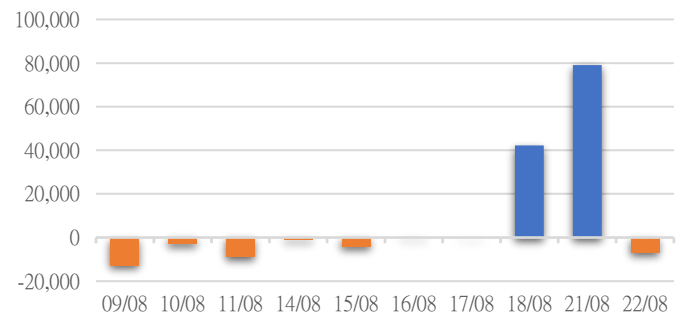
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
QTP	2,314.48	BSR	2,387
NAB	354	VLC	1,178

UPCoM 自營交易最大前名

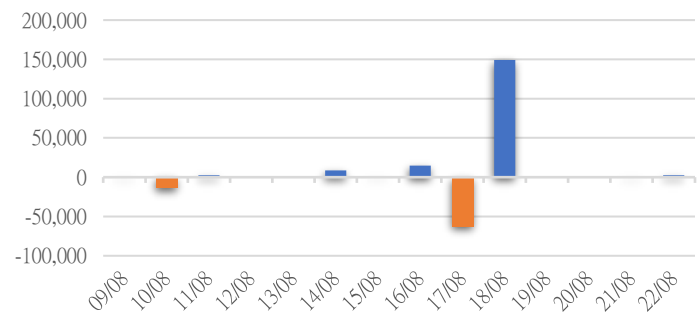
HSX 自營交易每日買/賣超 (Bil.VND)



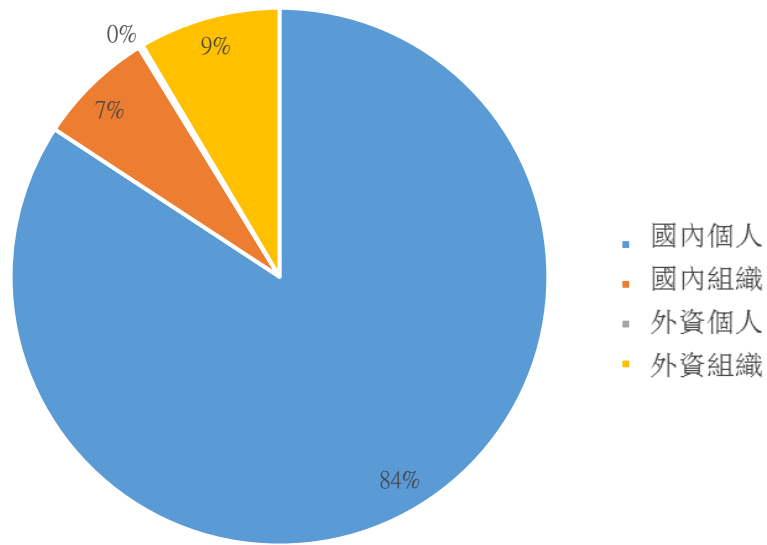
HNX 自營交易每日買/賣超 (Mil.VND)



UPCoM 自營交易每日買/賣超 (Mil.VND)

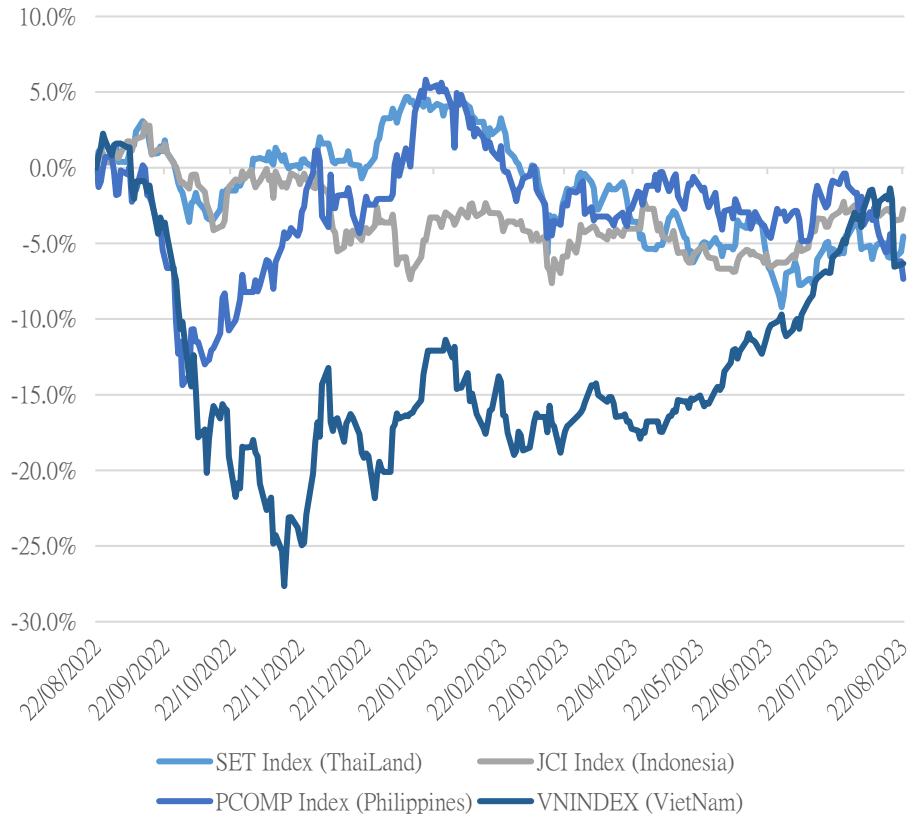


越南證券市場投資人類別統計



資料源: FiinPro – YSVN

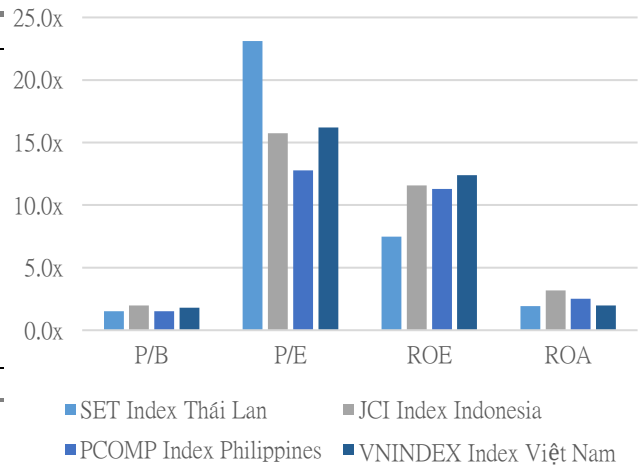
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.5x	2.0x	1.5x	1.8x
P/E		23.0x	15.7x	12.8x	16.2x
ROE	%	7.50	11.58	11.29	12.39
ROA	%	1.92	3.18	2.50	1.98
Vốn hóa	Tỷ USD	527.43	658.06	160.27	197.74
GTGD	Triệu USD	1.49	0.57	0.06	1.46
LS cổ tức	%	3.18	4.00	2.56	1.65

源: Bloomberg & YSVN



■ SET Index Thái Lan ■ JCI Index Indonesia
■ PCOMP Index Philippines ■ VNINDEX Index Việt Nam

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