

當日市場：投資者的情緒逆轉

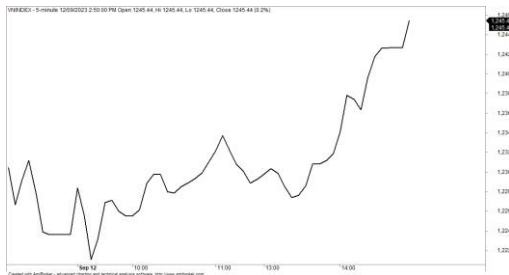
2023/09/13

市場走勢

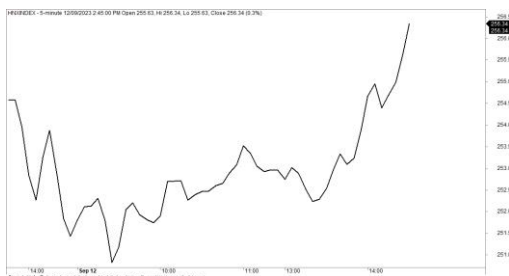
市場指數	VNI	HNI	UPCOM
收盤	1,245.44	256.32	94.27
%日	1.78%	1.99%	0.60%
%週	0.85%	1.60%	-0.02%
%月	1.07%	4.51%	1.06%
%年	-0.33%	-9.45%	4.45%
成交值(Bil.VND)			
當日	9,763	1,044	442
日均量/週	26,223	2,334	1,105
日均量/月	23,211	2,272	1,013
外資進出			
買進	1,741.37	19.31	19.57
賣出	1,600.87	15.80	9.36
買賣超	140.50	3.51	10.20
市場漲跌家數			
上漲	138	121	149
下跌	305	61	107
持平	56	73	84
市場指標			
P/E	14.61	21.58	18.21
總市值 (兆盾)	4,930	331	1,121
股息殖利率	1.75%	2.85%	5.32%

資料源: Bloomberg – YSVN

VNINDEX



HNIINDEX



市場走勢

市場的走勢與前一交易日完全相反，漲幅擴散至大盤。指數收於盤中的最高水平，VN-Index 上漲 1.78%，止於 1245.44 點，HNX-Index 和 Upcom-Index 同步分別上漲 1.99% 和 0.6%。3 大市場的交易額達到 23 兆 1,440 億越南盾。

金融股再次吸引現金流，其中證券股錄得 SSI、VND、AGR、BSI、FTS、CTS 收盤漲停。此外，SHB、BCG、STB、MSB 上漲均超過 2%。現金流也流入至許多其他行業板塊，如房地產、鋼鐵、零售業，HPG、HSG、DIG、DXG、NVL、VIC、VRE、MWG 等均大幅上漲。外資在整個市場逆轉買超 1,490 億越南盾，其中 PDR（730 億）、SSI（720 億）、VIX（620 億）在買超方面領先。相反，VIC（970 億）、KBC（730 億）、STB（530 億）被拋售最多的股票。

市場短期觀點

我們認為市場可能會繼續上漲，VN-Index 可能會在下一交易日測試 1,255 點的阻力位。同時，市場進入積極劇烈波動的時期，因此流動性在未來幾個交易日可能會再次增加，尤其是現金流仍主要集中在中小型股。積極點是，房地產股指處於技術性復甦階段，因此市場可能不會出現強勁調整階段。此外，短期情緒指標依然樂觀，因此我們評估短期風險仍然較低。

大盤的短期走勢仍維持上漲。因此，在短期內，我們建議投資者可以繼續持有投資組合中較高比例的股票。

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	1253	1300	870	800
HNX-Index	上漲	上漲	260	306	189	160
VN30	上漲	上漲	1270	1300	980	960
VNMidcaps	上漲	上漲	1280	1250	963	900
VNSmallcaps	上漲	上漲	1250	1250	804	750

胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1245.44	1.78%
VN30	1255.83	2.04%
VN Mid	1810.77	2.35%
VN Small	1474.96	1.76%

河內交易所 (HSX)

	收盤	漲跌%
HNI	256.32	1.99%
HN30	551.49	3.31%
VNX AllSh	1257.81	2.11%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	94.27	0.60%

外資交易	成交值 (Bil.VND)
買進	1741.37
賣出	1600.87
買超/賣超	140.5

外資交易	成交值 (Bil.VND)
買進	19.31
賣出	15.80
買超/賣超	3.51

外資交易	成交值 (Bil.VND)
買進	19.57
賣出	9.36
買超/賣超	10.20

上漲排名/ 股碼	漲跌(VND)	漲跌%
BSI	2700	6.99%
AGR	1250	6.98%
VPH	700	6.97%
CTS	2100	6.94%
FTS	2950	6.89%

上漲排名/ 股碼	漲跌(VND)	漲跌%
MBS	2100	10.00%
KSV	3200	9.82%
SHS	1700	9.04%
PSI	800	7.02%
IVS	900	6.92%

上漲排名/ 股碼	漲跌(VND)	漲跌%
BMS	421	3.03%
VSF	903	2.40%
SBS	184	1.98%
VGG	771	1.96%
AAS	203	1.62%

下跌排名/ 股碼	漲跌(VND)	漲跌%
HPX	-470	-6.91%
VSH	-1300	-2.95%
HVN	-300	-2.25%
TDC	-200	-1.53%
BFC	-300	-1.44%

下跌排名/ 股碼	漲跌(VND)	漲跌%
LAS	-300	-2.04%
CAP	-1000	-1.28%
VC3	-300	-1.23%
SCG	-600	-0.89%
DHT	-200	-0.88%

下跌排名/ 股碼	漲跌(VND)	漲跌%
PGB	-3965	-13.63%
GDA	-3378	-10.36%
DDV	-553	-4.29%
PXL	-335	-3.05%
DRI	-238	-2.87%

*備註: 市值>5,000 億盾; 成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	494,635
BID	235,221
VHM	228,604
VIC	225,404
GAS	194,075

市值排名/ 股碼	Bil.VND
HUT	24,009
PVS	17,159
IDC	15,873
SHS	15,287
THD	13,898

市值排名/ 股碼	Bil.VND
ACV	163,347
VGI	76,050
BSR	65,631
MCH	57,501
VEA	50,928

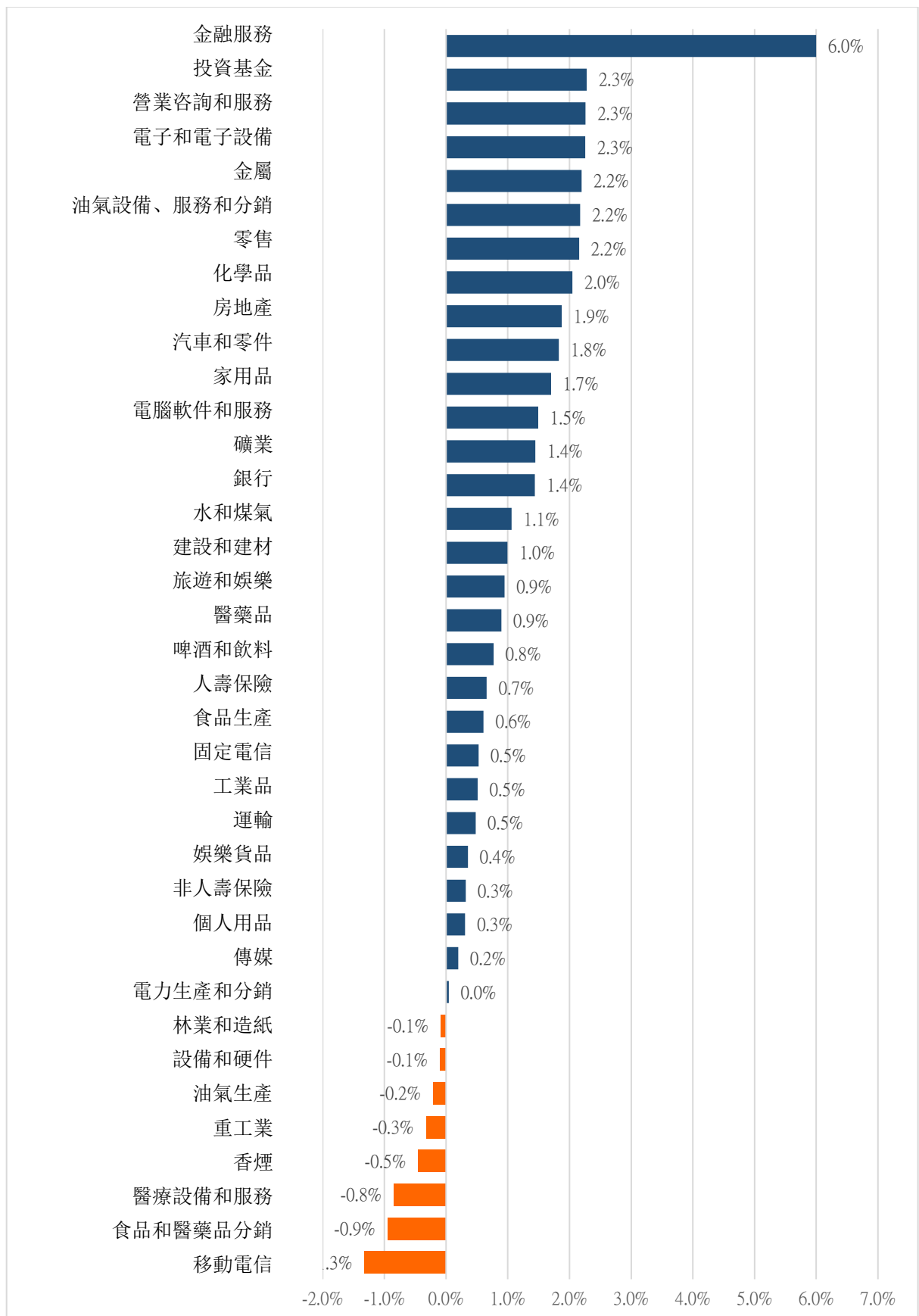
交易量排名/ 股碼	成交值	30 日均
NVL	57,206,800	47,014,159
VIX	38,159,100	36,308,129
SSI	37,129,019	30,458,082
VND	35,687,500	34,080,820
DXG	28,178,700	26,166,985

交易量排名/ 股碼	成交值	30 日均
SHS	27,308,078	22,575,867
HUT	8,933,374	5,625,311
CEO	8,324,275	16,457,958
MBS	6,027,611	3,606,005
PVS	4,764,643	6,131,698

交易量排 名/股碼	成交值	30 日均
BSR	10,105,402	9,369,023
SBS	7,433,860	4,117,343
AAS	4,419,606	2,950,954
C4G	3,002,059	3,506,343
DDV	2,822,589	1,631,245

資料源: Bloomberg & Yuanta Research

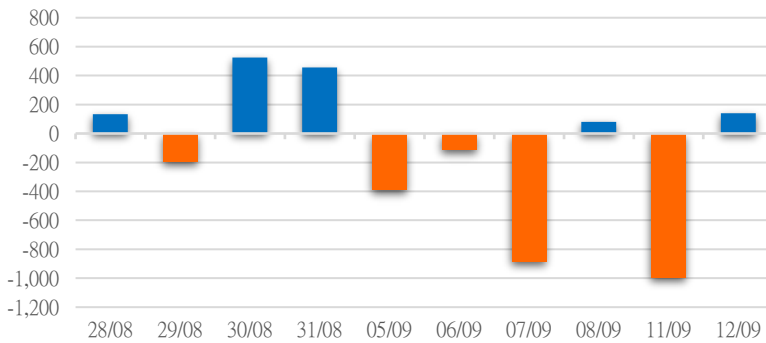
各行業板塊的交易走勢



資料源: FinPro - YSVN

外資買進賣統計

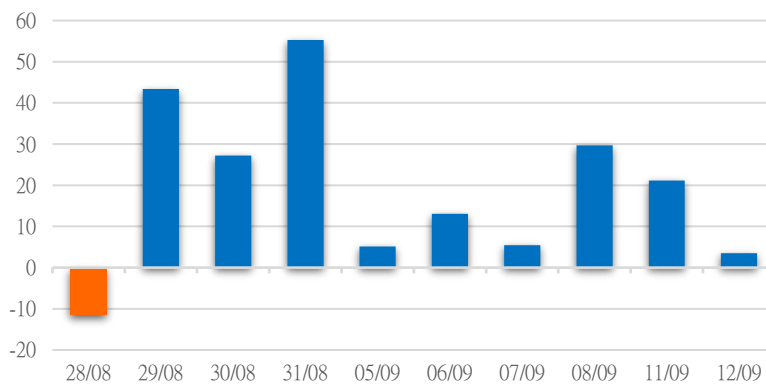
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PDR	72,858	VIC	92,475
SSI	70,011	KBC	72,440
VIX	61,453	STB	52,700
VCB	59,996	VPB	28,850
VHM	44,135	SHB	25,093

HSX 外資買/賣超的前 5 名

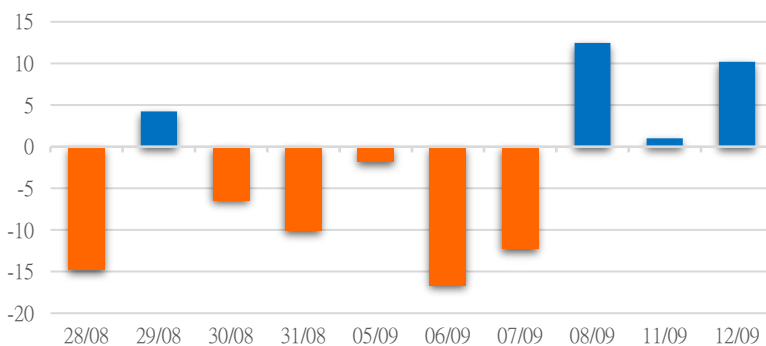
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	5,788	SHS	4,585
PVI	2,841	CEO	3,913
PVS	2,495	NVB	1,408
VNR	745	MBS	1,381
VIG	662	HCC	239

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)
QNS	6,254	VEA	1,887
LTG	1,352	ACV	387
BSR	1,347	CSI	208
MPC	1,303	RIC	101
PAT	911	IFS	76

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)
HPG	54,184	VCB	28,689
STB	32,690	SSI	27,070
VHM	27,782	FPT	20,192
VNM	27,221	GEX	17,281
ACB	25,936	VND	8,683

HSX 自營交易最大前名

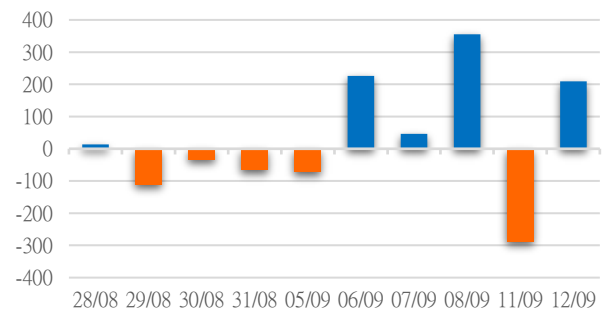
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
HTP	56,000.00	IDC	4,851
		PVS	3,600.0
		HUT	2,012.5

HNX 自營交易最大前名

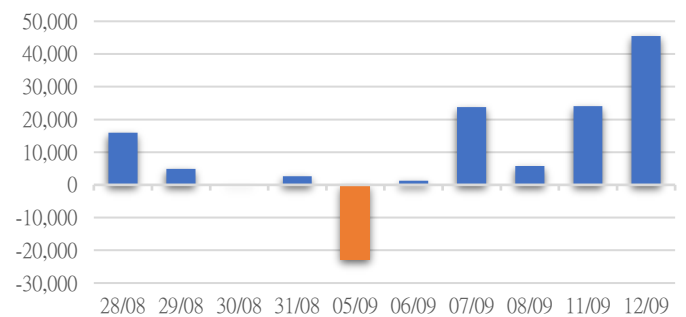
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VOC	3,468.00		
BSR	231		

UPCoM 自營交易最大前名

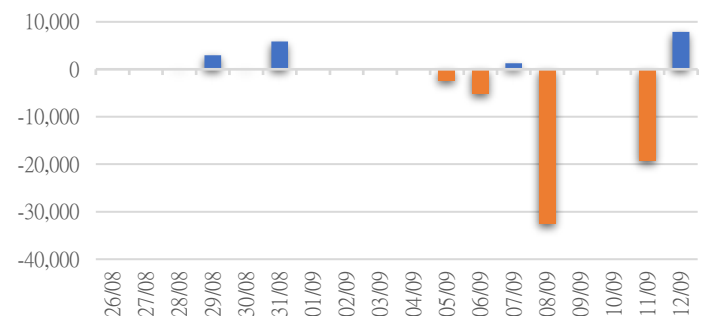
HSX 自營交易每日買/賣超 (Bil.VND)



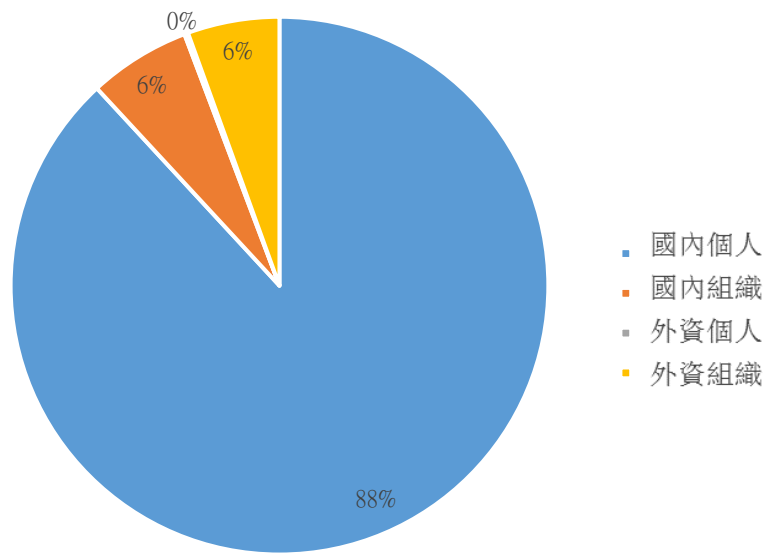
HNX 自營交易每日買/賣超 (Mil.VND)



UPCoM 自營交易每日買/賣超 (Mil.VND)

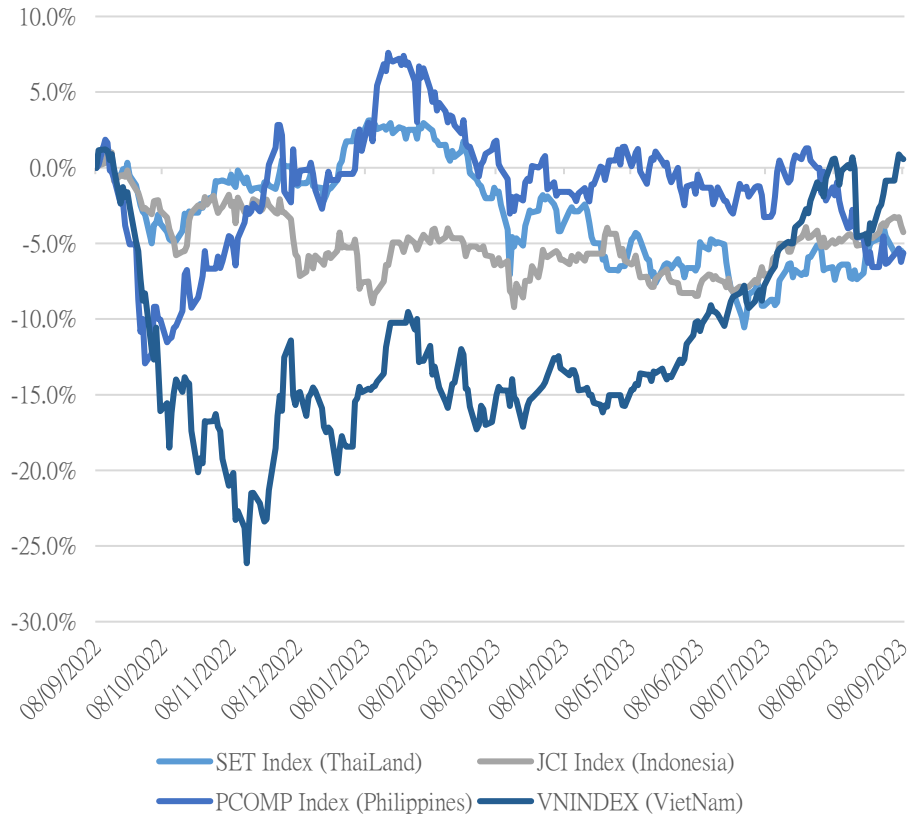


越南證券市場投資人類別統計



資料源: FiinPro – YSVN

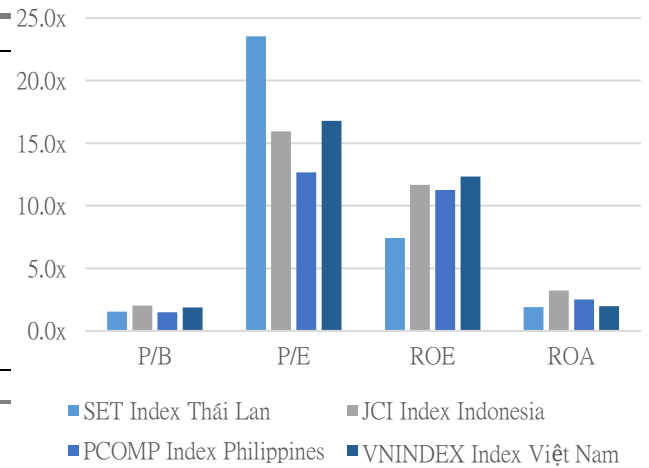
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.5x	2.0x	1.5x	1.9x
P/E		23.6x	15.9x	12.7x	17.0x
ROE	%	7.42	11.67	11.26	12.34
ROA	%	1.90	3.23	2.50	1.98
Vốn hóa	Tỷ USD	532.99	669.33	157.28	206.46
GTGD	Triệu USD	0.93	0.62	0.05	0.93
LS cổ tức	%	2.99	3.96	2.67	1.52

源: Bloomberg & YSVN



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

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