

當日市場：必要的復甦階段

2023/10/05

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,128.67	230.20	87.47
%日	0.95%	1.55%	0.91%
%週	-2.18%	-2.39%	-1.42%
%月	-7.79%	-7.83%	-6.27%
%年	4.69%	-2.30%	6.18%
成交值(Bil.VND)			
當日	9,763	1,044	442
日均量/週	15,443	1,881	763
日均量/月	22,397	2,252	1,013
外資進出			
買進	1,372.56	16.35	12.76
賣出	1,182.44	16.24	24.14
買賣超	190.12	0.11	-11.38
市場漲跌家數			
上漲	138	62	149
下跌	305	26	107
持平	56	73	84
市場指標			
P/E	13.36	19.85	17.28
總市值 (兆盾)	4,509	305	1,064
股息殖利率	1.96%	3.59%	5.58%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

VN-Index 在早盤大幅下跌，當美國股市在上一交易日大幅下跌時，VN-Index 有時下跌至近 1,100 點。需求重新激活，幫助 VN-Index 收盤上漲 1128.67 點，漲幅為 0.95%。其餘指數也上漲。3 大市場的交易額均達到 16 兆 2,600 億越南盾。

VIC、VRE、VHM、SSI、STB、GVR、BID 是幫助指數得分的股票。相反，SSB (-1.8%)、VJC (-1.1%) 是 VN30-Index 籃子中下跌最多的兩檔股票，顯示拋售力度有所走弱。

市場在當日也出現許多大幅上漲的股票，如 DCM、BSI、FTS、FRT、RDP 等漲停。房地產、證券、化工、物流板塊優於大盤。

外資在整個市場買超 1,770 億越南盾，其中 DGC (700 億)、SSI (550 億)、VND (440 億) 在買超方面領先。相反，CTG (460 億)、DPM (430 億)、MSN (360 億) 被拋售最多的股票。

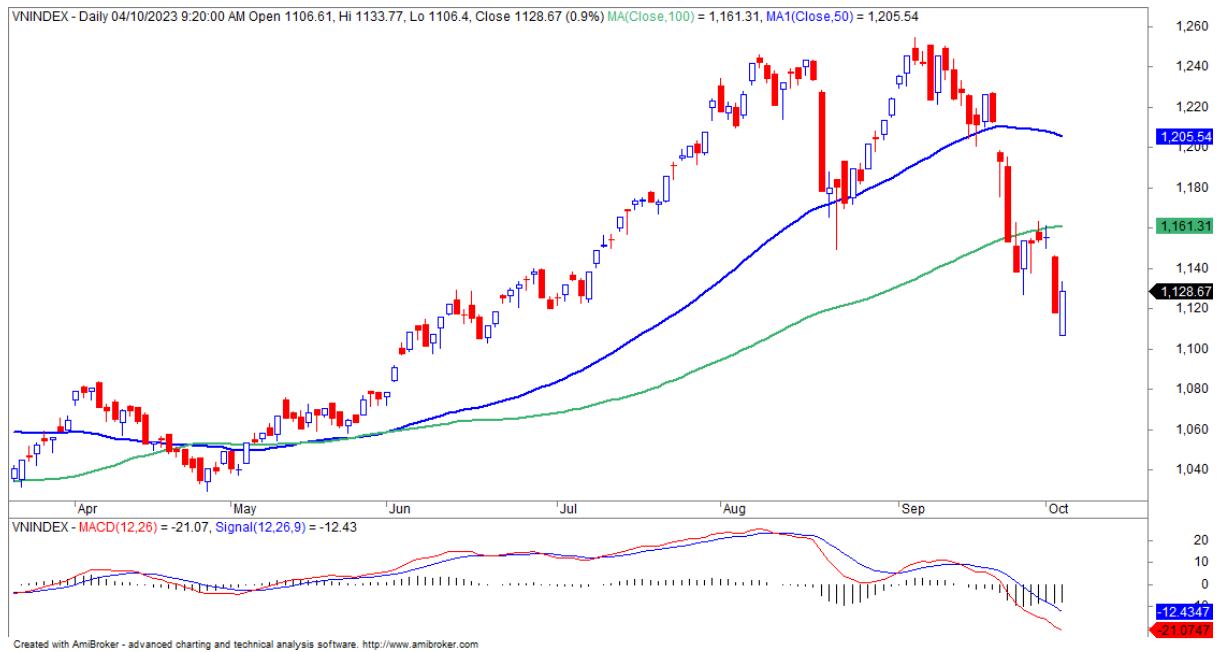
市場短期觀點

我們認為，市場在下個交易日可能會繼續上漲，VN-Index 可能會重新測試 1,145 - 1,150 點的阻力位。同時，中小型股的短期風險出現逐漸下跌的跡象，顯示該兩檔股的下跌壓力在未來幾個交易日可能會逐漸減輕。積極點是，流動性水平比此前復甦期有所改善，顯示需求有所改善，復甦期有更多積極的跡象。但整個風險仍較高，因此投資者僅應以低比例的股票探索買進。

大盤的短期走勢仍維持下跌。因此，在短期內，我們建議投資者可以停止拋售，並僅應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	下跌	1253	1300	870	800
HNX-Index	下跌	下跌	260	306	189	160
VN30	下跌	下跌	1270	1300	980	960
VNMidcaps	下跌	下跌	1280	1250	963	900
VNSmallcaps	下跌	下跌	1250	1250	804	750

胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1128.67	0.95%
VN30	1138.54	0.68%
VN Mid	1611.97	2.03%
VN Small	1338.29	1.26%

河內交易所 (HSX)

	收盤	漲跌%
HNI	230.2	1.55%
HN30	478.89	2.57%
VNX AllSh	1134.66	1.08%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	87.47	0.91%

外資交易	成交值 (Bil.VND)
買進	1372.56
賣出	1182.44
買超/賣超	190.12

外資交易	成交值 (Bil.VND)
買進	16.35
賣出	16.24
買超/賣超	0.11

外資交易	成交值 (Bil.VND)
買進	12.76
賣出	24.14
買超/賣超	-11.38

上漲排名/ 股碼	漲跌(VND)	漲跌%
FRT	6200	6.97%
FTS	2850	6.93%
BSI	2550	6.90%
RDP	700	6.60%
SSI	1550	5.13%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DXP	1200	9.76%
PSI	600	6.82%
SHS	1000	6.29%
MBS	1100	5.34%
PLC	1300	4.06%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DSC	899	4.89%
AMS	268	2.73%
DDV	255	2.34%
MCM	725	1.94%
BVB	196	1.92%

下跌排名/ 股碼	漲跌(VND)	漲跌%
TNH	-600	-2.63%
TSC	-60	-1.55%
HHP	-100	-0.94%
QCG	-100	-0.93%
DRC	-150	-0.66%

下跌排名/ 股碼	漲跌(VND)	漲跌%
GKM	-1300	-3.83%
DHT	-700	-3.43%
TAR	-500	-3.42%
EVS	-200	-2.25%
VC7	-300	-1.44%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ABW	-323	-2.88%
VUA	-808	-2.75%
TCI	-235	-2.24%
AAS	-212	-2.21%
DGT	-106	-1.63%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	Bil.VND
BID	210,182
GAS	198,209
HPG	144,207
FPT	117,091
MBB	94,114

市值排名/ 股碼	Bil.VND
HUT	19,725
PVS	17,207
IDC	14,817
THD	13,513
SHS	12,929

市值排名/ 股碼	Bil.VND
ACV	162,470
BSR	64,149
MCH	54,436
VEA	49,134
SSH	23,881

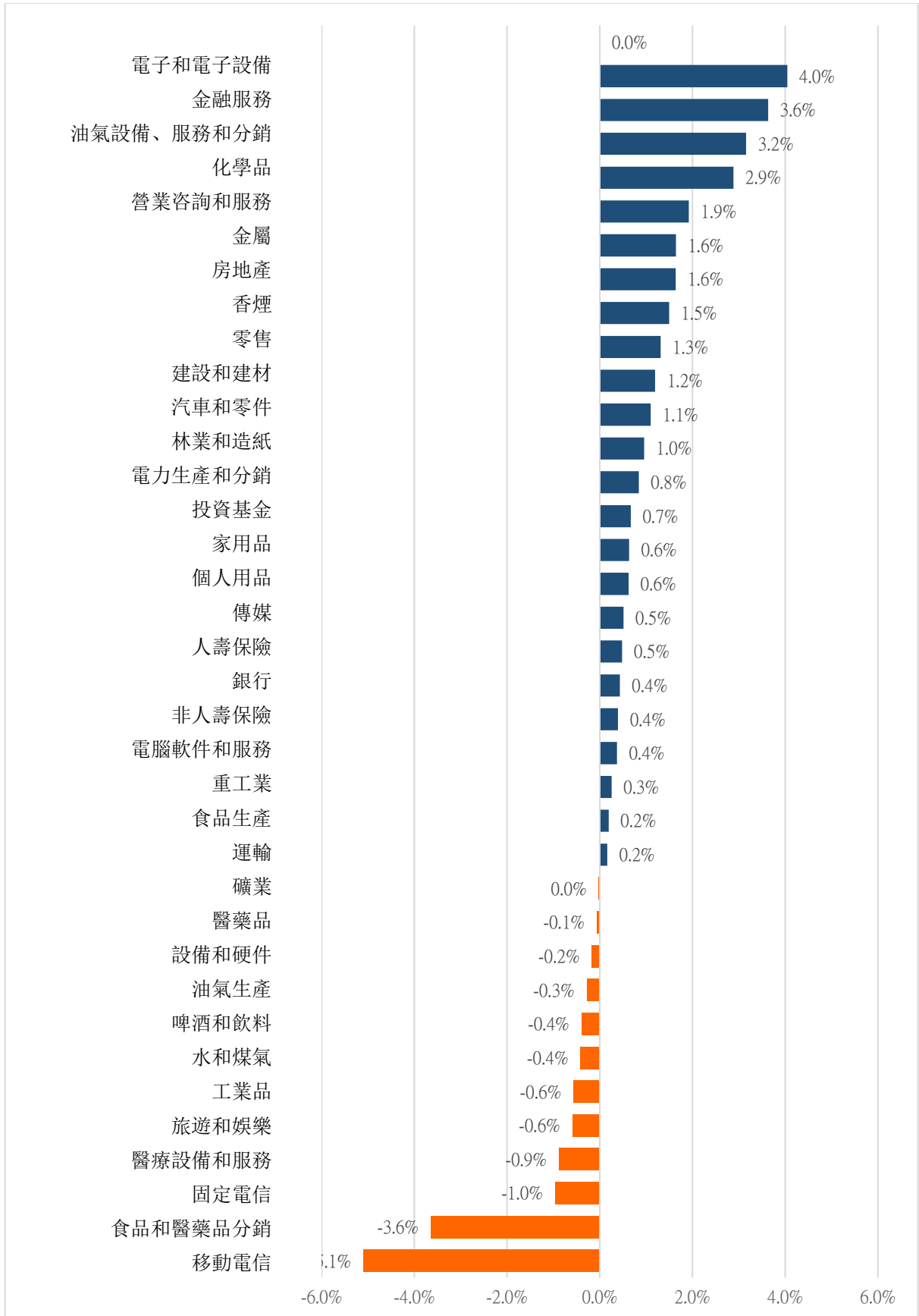
交易量排名/ 股碼	成交值	30 日均
VIX	44,958,100	37,253,166
SSI	33,560,601	31,315,106
VND	31,617,000	29,903,173
HPG	21,145,200	31,308,310
DIG	19,183,400	21,376,075

交易量排名/ 股碼	成交值	30 日均
SHS	33,973,051	24,558,378
PVS	8,834,987	7,866,198
HUT	7,979,008	6,620,105
AMV	5,576,577	1,567,861
MBS	4,850,804	4,924,869

交易量排 名/股碼	成交值	30 日均
BSR	8,571,120	12,174,774
SBS	3,215,914	4,593,413
AAS	1,907,508	3,376,038
ABB	1,696,760	2,060,106
DDV	1,379,392	1,825,579

資料源: Bloomberg & Yuanta Research

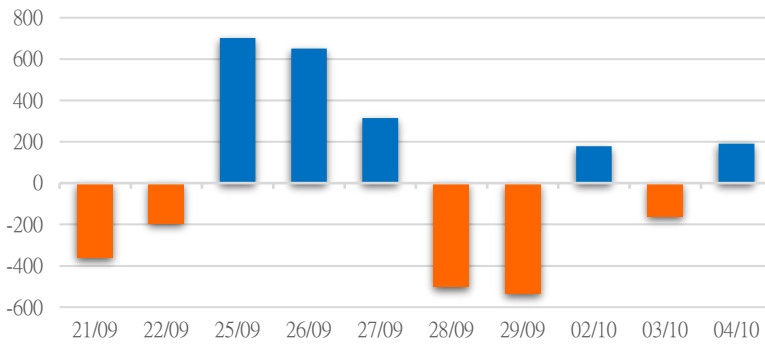
各行業板塊的交易走勢



資料源: FinPro - YSVN

外資買進賣統計

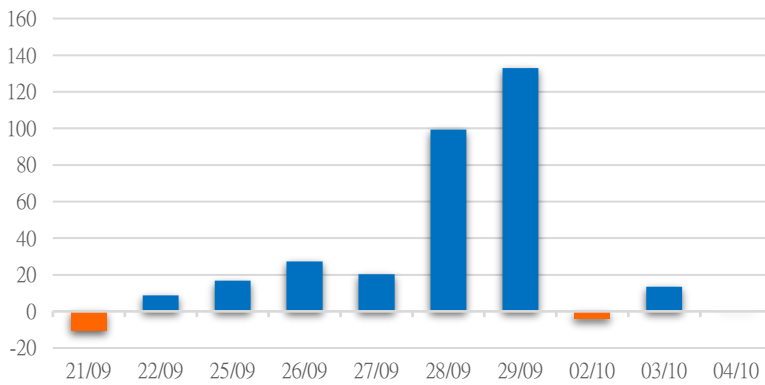
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DGC	69,477	FUEVFNVD	22,543
SSI	54,788	VCI	19,754
VND	43,709	PVD	19,636
VIX	32,661	HDB	16,757
FTS	14,286	FUESSVFL	9,844

HSX 外資買/賣超的前 5 名

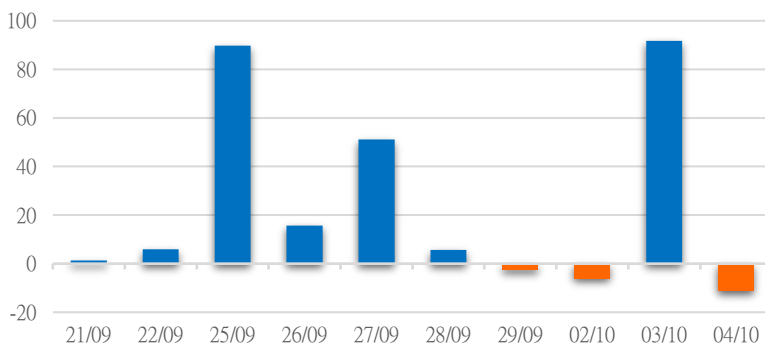
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	11,962	PVS	10,041
BVS	578	SHS	1,942
PVI	344	VIG	479
NTP	76	EVS	107
IVS	47	APS	21

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)
SBS	76	VEA	8,414
ABW	59	BSR	6,716
AAS	57	VTP	969
OIL	47	ACV	803
HWS	23	VOC	302

UPCOM 外資買/賣超的前 5 名

源: FiinPro - 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)
BCM	64,049	GEX	34,988
FUEVFNVD	35,264	HPG	23,939
STB	18,758	VPB	19,913
MSB	6,530	MBB	18,273
DIG	6,432	FUEDCMID	13,309

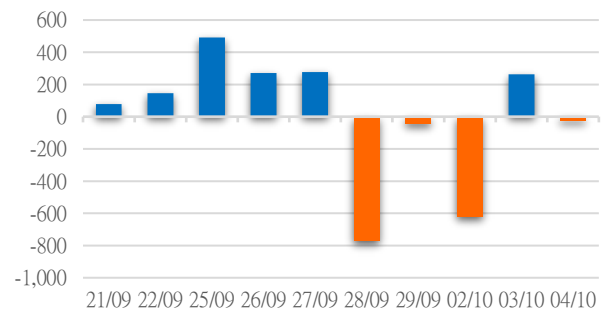
HSX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	8,116.70	SCI	8
SHS	1,688.41	PSI	1.5

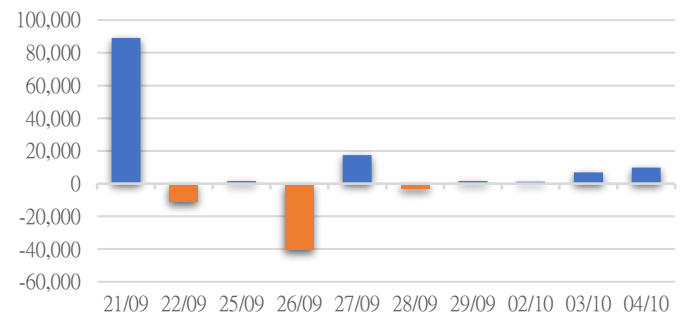
HNX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VOC	4,074.28	GDA	119
QNS	468	ABB	1
TCI	197		

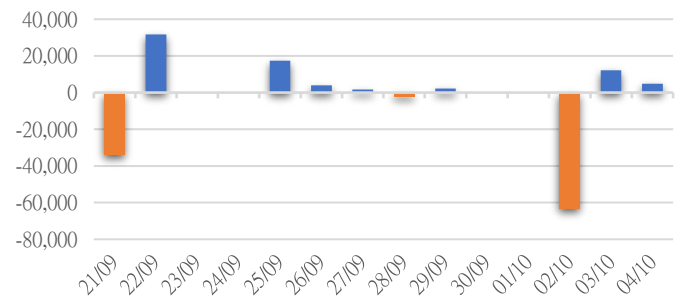
HSX 自營交易每日買/賣超 (Bil.VND)



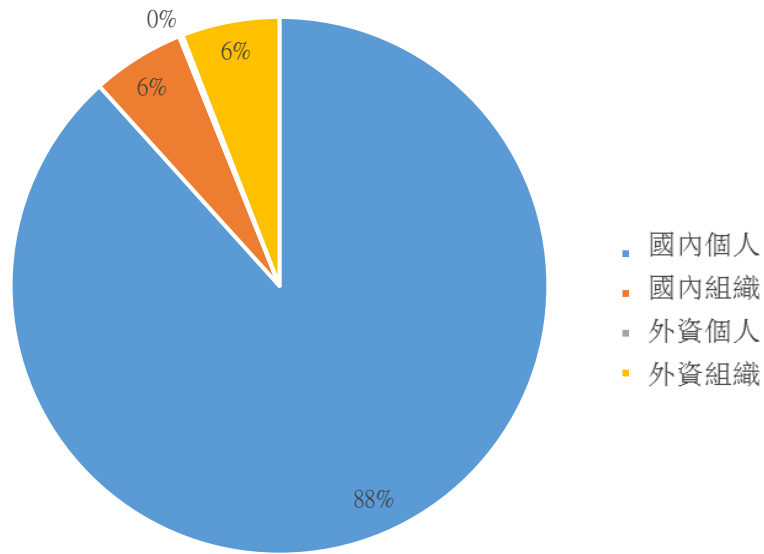
HNX 自營交易每日買/賣超 (Mil.VND)



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

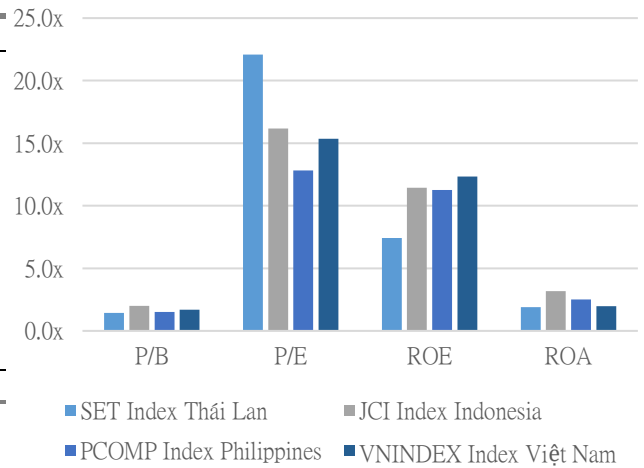
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.5x	1.7x
P/E		22.1x	16.2x	12.8x	15.4x
ROE	%	7.43	11.43	11.26	12.33
ROA	%	1.90	3.17	2.51	1.98
Vốn hóa	Tỷ USD	477.40	661.94	156.40	183.26
GTGD	Triệu USD	1.56	0.59	0.08	0.80
LS cổ tức	%	3.18	3.92	2.59	1.63

源: Bloomberg & YSVN



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

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