

當日市場：市場繼續上漲

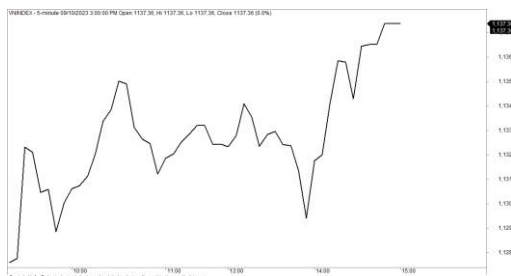
2023/10/10

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,137.36	233.55	86.89
%日	0.78%	1.35%	-0.36%
%週	-1.55%	-1.34%	-2.03%
%月	-8.39%	-8.84%	-8.27%
%年	9.79%	3.30%	8.64%
<b>成交值(Bil.VND)</b>			
當日	9,763	1,044	442
日均量/週	15,094	1,773	737
日均量/月	20,553	2,136	955
<b>外資進出</b>			
買進	645.93	21.56	4.88
賣出	1,356.07	19.98	12.99
買賣超	-710.14	1.58	-8.11
<b>市場漲跌家數</b>			
上漲	138	122	149
下跌	305	52	107
持平	56	73	84
<b>市場指標</b>			
P/E	13.48	20.21	17.18
總市值 (兆盾)	4,552	310	1,058
股息殖利率	1.94%	3.48%	5.56%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

基於週五交易日的積極情緒，儘管中東地緣政治局勢緊張，但市場在本周的首個交易日繼續保持上漲勢頭。VN-Index 收盤上漲 0.78%，止於 1137.36 點。HNX-Index 上漲 1.35%，而 Upcom-Index 下跌 0.36%。3 大市場的交易額均達到 14 兆 3,220 億越南盾。

VN30-Index 收盤上漲 0.93%。指數寬度有 20 檔上漲股、9 檔下跌股和 1 檔持平股。在世界油價復甦的支撐下，GAS (2.85%) 開盤時大幅上漲。不僅如此，其他眾多大藍籌股如 FPT (3.13%)、HPG (2.2%)、ACB (3.21%)、PLX (2%)、VPB (2.15%)、VHM (2.06%) 等在當日大幅上漲。相反，VIC、VCB、VRE 逆市而行。

在行業板塊方面，化學品 (DCM、CSV、DPM)、鋼鐵 (HPG、HSG、NKG)、房地產 (NVL、DIG、PDR、DXG 等) 均在當日上漲。外資在整個市場賣超 7,170 億越南盾，其中 FUEVFNND (1,520 億)、VIC (870 億)、POW (700 億) 被拋售最多的股票。相反，NVL (140 億)、IDC (100 億)、HPG (70 億) 在買超方面領先。

市場短期觀點

我們認為市場在下一個交易日可能會再次下跌，但跌幅可能不太大。積極點是需求出現改善的跡象，短期風險出現逐漸下跌的跡象。同時，市場出現進入短期調整階段的跡象，因此市場的波動性在未來幾個交易日可能會較小，各類股票可能會分化。此外，短期情緒指標持續從過度悲觀區域小幅上漲，顯示投資者的悲觀情緒有所減輕，短期機會逐漸增加。

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繼續考慮以低比例的股票買進新股，以探索短期趨勢。

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	1137.36	0.78%
VN30	1150.37	0.93%
VN Mid	1647.6	1.58%
VN Small	1353.33	1.03%

**河內交易所 (HSX)**

	收盤	漲跌%
HNI	233.55	1.35%
HN30	490.01	2.05%
VNX AllSh	1150.17	1.12%

**UPCOM 市場 (UPCoM)**

	收盤	漲跌%
UPCoM	86.89	-0.36%

外資交易	成交值 (Bil.VND)
買進	645.93
賣出	1356.07
買超/賣超	-710.14

外資交易	成交值 (Bil.VND)
買進	21.56
賣出	19.98
買超/賣超	1.58

外資交易	成交值 (Bil.VND)
買進	4.88
賣出	12.99
買超/賣超	-8.11

上漲排名/ 股碼	漲跌(VND)	漲跌%
CSV	2950	6.89%
YEG	1050	6.86%
PSH	750	6.85%
HTN	1050	6.75%
RDP	750	6.64%

上漲排名/ 股碼	漲跌(VND)	漲跌%
CEO	1300	7.03%
PVC	1100	6.75%
VGS	1200	6.49%
LAS	600	4.51%
VFS	900	4.41%

上漲排名/ 股碼	漲跌(VND)	漲跌%
BSR	945	4.82%
OIL	412	4.12%
DDV	435	3.92%
PXL	256	2.88%
NTC	4264	2.32%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BIC	-1300	-4.87%
PTB	-2700	-4.33%
GSP	-500	-3.65%
LHG	-600	-1.82%
VIC	-750	-1.63%

下跌排名/ 股碼	漲跌(VND)	漲跌%
TAR	-1400	-10.00%
DXP	-1000	-6.94%
KSV	-600	-1.41%
EVS	-100	-1.15%
DTD	-300	-1.07%

下跌排名/ 股碼	漲跌(VND)	漲跌%
VOC	-928	-3.87%
GEE	-396	-1.52%
NAB	-111	-0.80%
DSC	-63	-0.35%
VGT	-35	-0.27%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	477,308
BID	213,470
VHM	200,519
GAS	193,385
VIC	175,250

市值排名/ 股碼	Bil.VND
HUT	20,528
PVS	17,589
IDC	15,510
SHS	14,068
THD	13,667

市值排名/ 股碼	Bil.VND
ACV	162,496
VGI	70,339
BSR	60,664
MCH	54,355
VEA	49,031

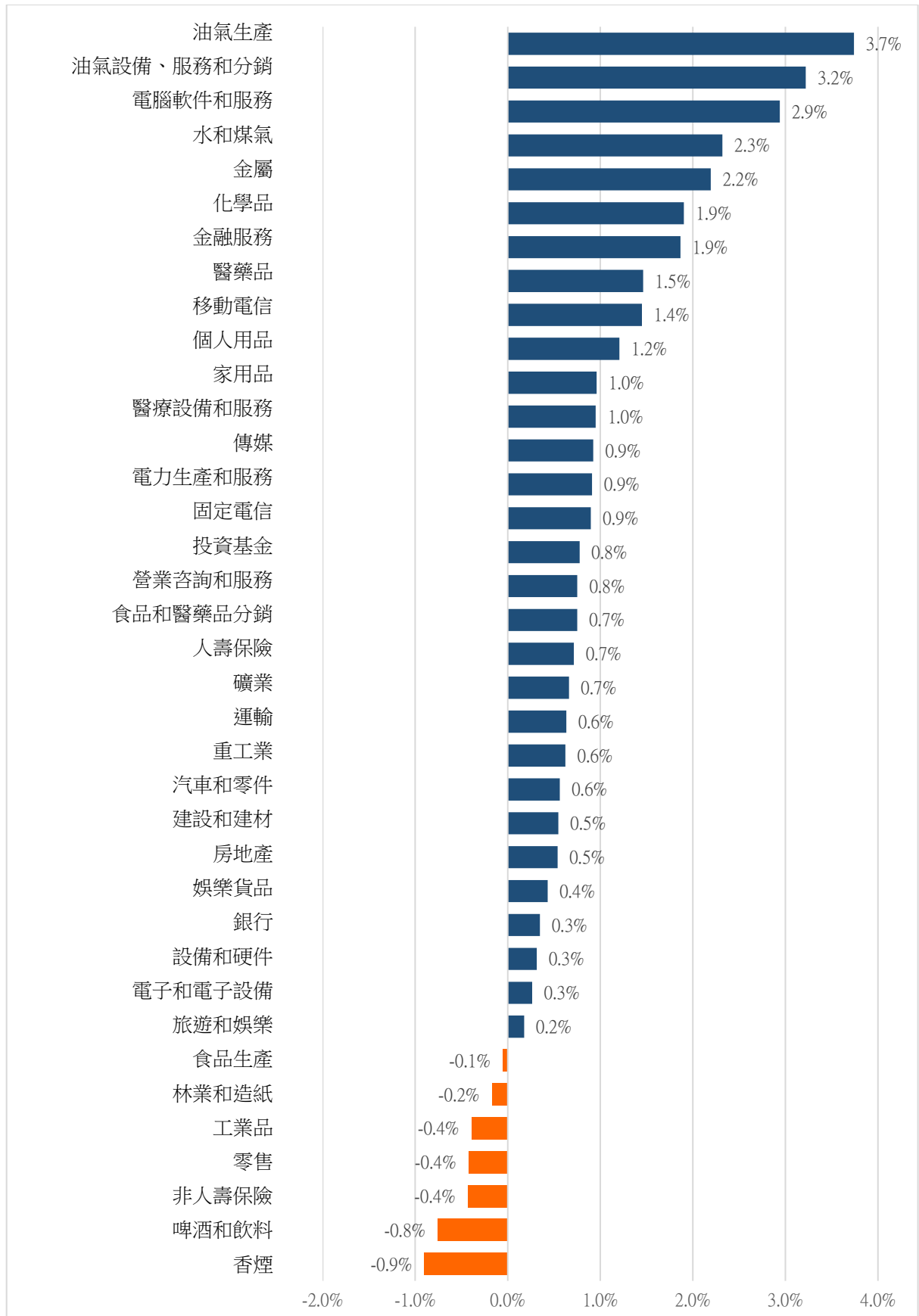
交易量排名/ 股碼	成交值	30 日均
VIX	25,316,300	37,008,449
VND	22,737,700	29,926,464
SSI	22,014,400	31,506,766
TPB	19,186,301	6,845,031
DIG	14,484,400	21,125,313

交易量排名/ 股碼	成交值	30 日均
SHS	23,395,312	25,323,156
CEO	7,764,334	9,651,310
PVS	5,997,732	7,697,960
TAR	4,994,035	1,858,893
MBS	4,523,193	4,965,975

交易量排 名/股碼	成交值	30 日均
BSR	10,609,155	11,962,297
DGT	4,519,100	782,587
TCI	4,114,341	1,139,168
NAB	2,855,948	636,506
DDV	2,142,279	1,739,238

資料源: Bloomberg & Yuanta Research

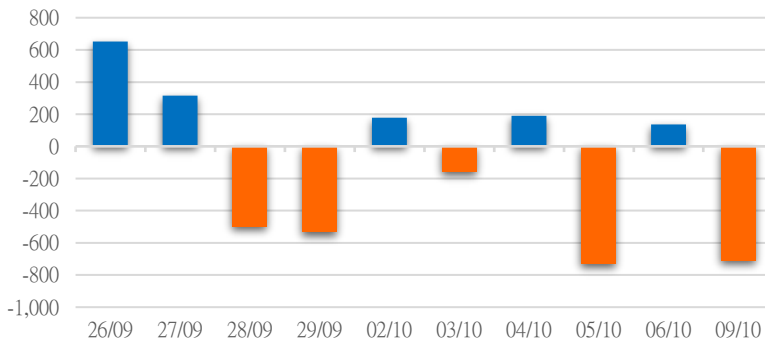
各行業板塊的交易走勢



資料源: FiinPro - YSVN

外資買進賣統計

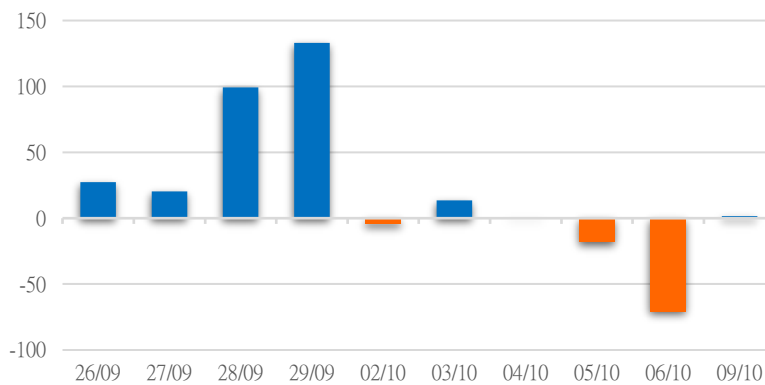
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
NVL	14,299	FUEVFNVD	151,931
HPG	6,664	VIC	86,633
KDH	6,293	POW	70,038
DCM	5,411	FRT	32,530
NT2	4,848	BWE	28,896

HSX 外資買/賣超的前 5 名

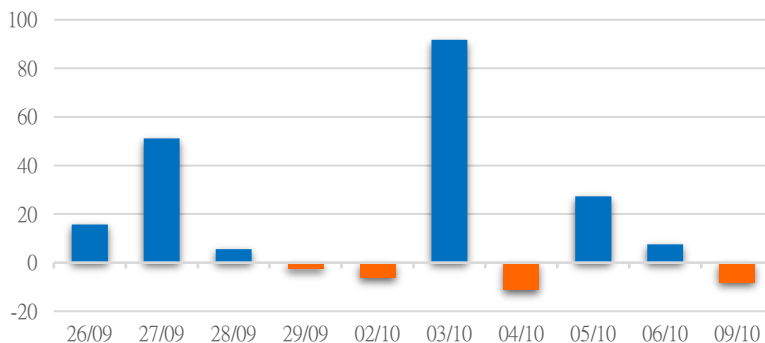
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	10,298	TNG	6,143
PVS	2,139	DTD	3,801
BVS	672	#N/A	#N/A
TIG	590	SHS	1,668
VIG	529	NVB	591

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)
ACV	1,035	MPC	5,717
LTG	756	VEA	4,941
QNS	568	VGG	135
SID	263	GDA	124
MCH	114	SBS	93

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)
FUEVFN30	148,042	FPT	66,978
POW	22,173	VPB	37,758
FUESSVFL	5,310	MWG	30,029
MBB	3,994	TCB	21,521
E1VFN30	1,784	PNJ	14,614

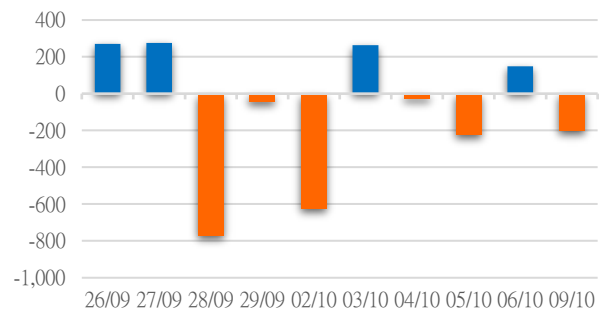
HSX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
		PVS	3,810
		PSI	3.9
		SCI	1.5

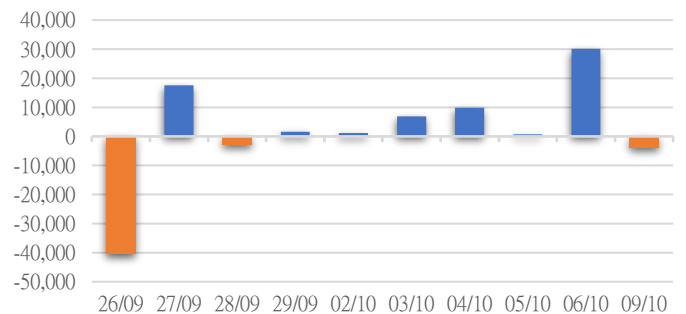
HNX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VOC	2,083.36	BSR	15,015
NAB	1,198	DDV	7,014
VEA	1,123	TID	133.9
TCI	471	GDA	123.5
		ABB	6.5

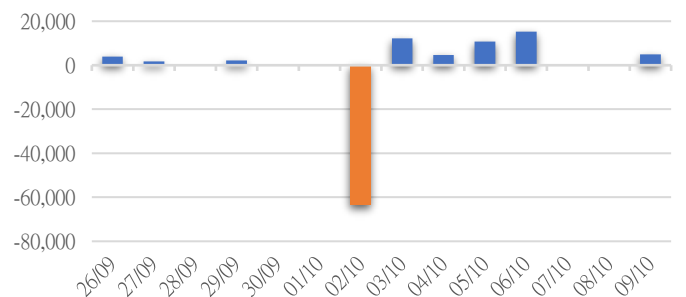
HSX 自營交易每日買/賣超 (Bil.VND)



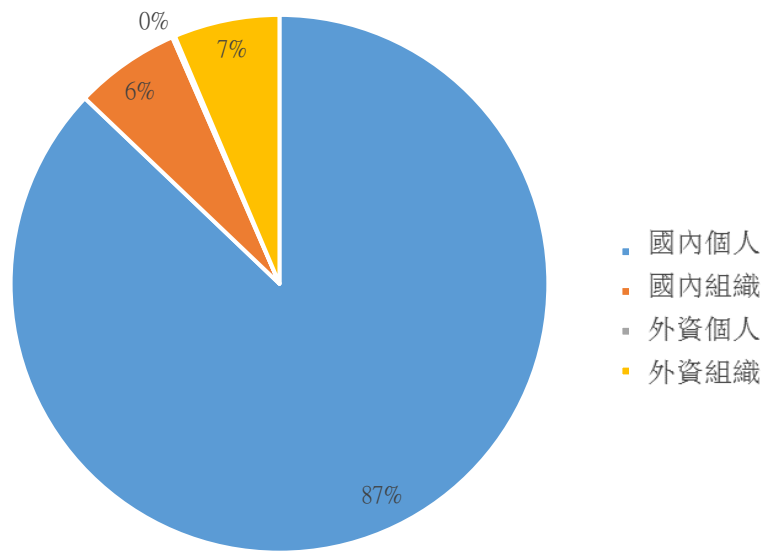
HNX 自營交易每日買/賣超 (Mil.VND)



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

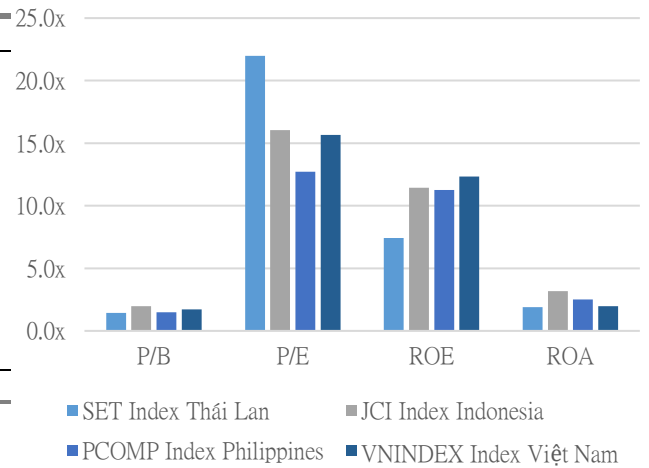
東南亞主要市場走勢比較



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		22.0x	16.1x	12.7x	15.7x
ROE	%	7.42	11.44	11.26	12.33
ROA	%	1.90	3.17	2.51	1.98
Vốn hóa	Tỷ USD	474.38	655.04	153.50	185.47
GTGD	Triệu USD	1.03	0.45	0.05	0.49
LS cổ tức	%	3.16	3.89	2.63	1.60

源: Bloomberg & YSVN





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