

當日市場：外資持續買超

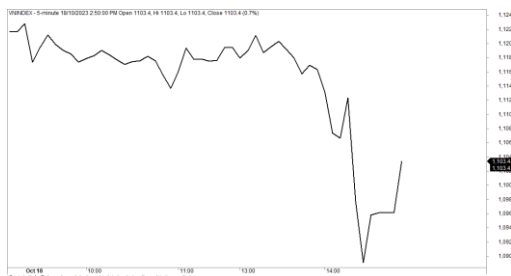
2023/10/19

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,103.40	227.11	85.95
%日	-1.63%	-1.27%	-0.81%
%週	-4.12%	-4.17%	-2.05%
%月	-8.95%	-9.33%	-7.75%
%年	3.74%	-0.88%	7.01%
成交值(Bil.VND)			
當日	9,763	1,044	442
日均量/週	15,792	2,191	730
日均量/月	17,602	2,052	847
外資進出			
買進	1,635.48	39.95	22.89
賣出	1,078.26	25.55	14.01
買賣超	557.22	14.40	8.89
市場漲跌家數			
上漲	138	17	149
下跌	305	79	107
持平	56	73	84
市場指標			
P/E	13.46	20.46	17.68
總市值 (兆盾)	4,524	307	1,090
股息殖利率	1.94%	3.65%	5.55%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場開盤時繼續小幅上漲，但在午盤大幅下跌。積極點是，下跌勢頭在尾盤有所收窄，幫助 VN-Index 收於 1,100 點以上。具體而言，VN-Index 收於 1,103.4 點，下跌 1.63%，HNX-Index 下跌 1.27%，Upcom-Index 下跌 0.81%。3 大市場的交易額達到 22 兆 6,730 億越南盾。

強勁的拋售壓力持續，導致 HPG、BID、MSN、MWG 下跌 3% 以上，而其他藍籌股如 ACB、BCM、GAS、VHM、VNM、TPB、STB 等下跌。此外，MSN、VIC、BCM 均創下 52 周的新低。相反，SSI 和 VJC 是當日反轉上漲的兩檔股票。

投機股出現拋售壓力，如 HQC、DIG、DLG、VOS、VOS、IDI 等跌停。在行業板塊方面，電力、公共投資和漁業被強勁拋售，而證券和油氣股小幅上漲。

外資的交易在當日是亮點，因為他們在整個市場買超近 5,820 億越南盾，其中 STB (1,200 億)、PVD (500 億)、SSI (500 億) 在買超方面領先。相反，VHM (340 億)、EIB (270 億)、VNM (250 億) 被拋售最多的股票。

市場短期觀點

我們認為市場在下一個交易日可能會復甦，VN-Index 可能會在 1,100 點附近波動。同時，市場仍處於短期調整階段，因此我們評估市場可能無法完全突破 VN-Index 的 1,100 點。此外，短期情緒指標下跌，因此投資者對當前市場走勢持悲觀情緒。

大盤的短期趨勢仍然下跌。因此，在短期內，我們建議投資者在此期間限制拋售，並可以考慮以低比例的股票探索買進。但若投資者有風險口味較低，投資者僅應在市場的短期趨勢確認上漲時考慮買進。

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	1103.4	-1.63%
VN30	1125.56	-1.36%
VN Mid	1563.78	-1.74%
VN Small	1291.14	-2.97%

河內交易所 (HSX)

	收盤	漲跌%
HNI	227.11	-1.27%
HN30	475.82	-0.52%
VNX AllSh	1114.05	-1.58%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	85.95	-0.81%

外資交易	成交值 (Bil.VND)
買進	1635.48
賣出	1078.26
買超/賣超	557.22

外資交易	成交值 (Bil.VND)
買進	39.95
賣出	25.55
買超/賣超	14.40

外資交易	成交值 (Bil.VND)
買進	22.89
賣出	14.01
買超/賣超	8.89

上漲排名/ 股碼	漲跌(VND)	漲跌%
VIX	550	3.85%
PVD	800	2.96%
GMD	700	1.09%
CNG	300	1.01%
DGC	900	1.00%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PVC	700	4.09%
DXP	400	3.03%
IDC	1000	2.00%
MBS	400	1.96%
SHS	300	1.85%

上漲排名/ 股碼	漲跌(VND)	漲跌%
TSJ	1913	10.07%
VUA	2219	7.09%
VOC	246	1.04%
MCH	456	0.59%
ABI	185	0.48%

下跌排名/ 股碼	漲跌(VND)	漲跌%
DRH	-340	-6.95%
BCG	-590	-6.94%
KSB	-1850	-6.93%
DXS	-470	-6.91%
CMX	-660	-6.91%

下跌排名/ 股碼	漲跌(VND)	漲跌%
VC7	-2000	-9.43%
PLC	-2600	-7.90%
IVS	-700	-7.14%
EVS	-600	-7.06%
DVM	-1000	-6.41%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BMS	-663	-5.82%
CSI	-1844	-4.97%
MSR	-829	-4.91%
PXL	-435	-4.83%
VTP	-2404	-4.78%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	Bil.VND
BID	208,917
GAS	195,682
HPG	144,207
FPT	118,234
MBB	94,375

市值排名/ 股碼	Bil.VND
HUT	19,903
PVS	18,163
IDC	16,500
THD	13,898
SHS	13,173

市值排名/ 股碼	Bil.VND
ACV	161,301
BSR	65,529
MCH	55,131
VEA	49,438
FOX	26,966

交易量排名/ 股碼	成交值	30 日均
VIX	48,845,800	33,152,485
SHB	32,907,300	14,631,563
HPG	31,519,100	22,644,111
VND	29,595,800	28,213,640
SSI	28,495,001	29,620,129

交易量排名/ 股碼	成交值	30 日均
SHS	38,260,704	26,982,032
PVS	12,523,761	7,460,891
MBS	8,511,228	5,325,700
HUT	7,713,581	5,699,973
IDC	7,430,183	3,829,952

交易量排 名/股碼	成交值	30 日均
BSR	11,904,210	11,133,975
SBS	3,802,124	3,377,645
AAS	3,123,773	2,531,946
VTP	2,273,647	1,277,198
VHG	2,108,097	1,329,353

資料源: Bloomberg & Yuanta Research

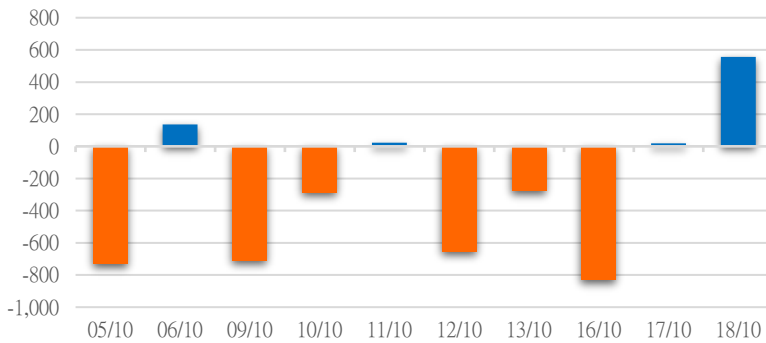
各行業板塊的交易走勢



資料源: FiinPro - YSVN

外資買進賣統計

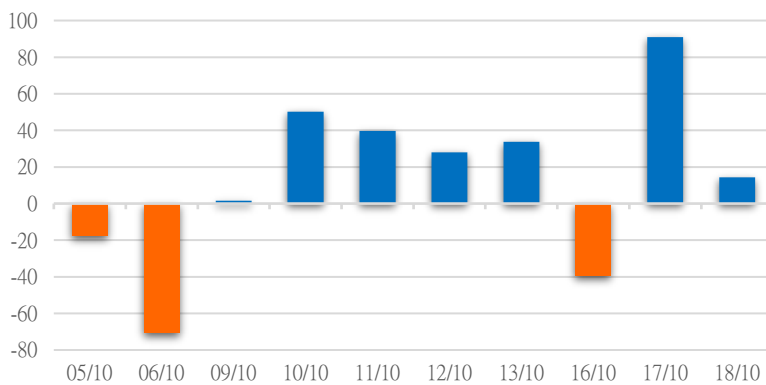
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVD	50,206	EIB	26,887
SSI	50,137	VCI	21,706
VIX	40,751	CII	11,199
VND	36,231	LPB	10,611
FPT	35,598	BWE	3,868

HSX 外資買/賣超的前 5 名

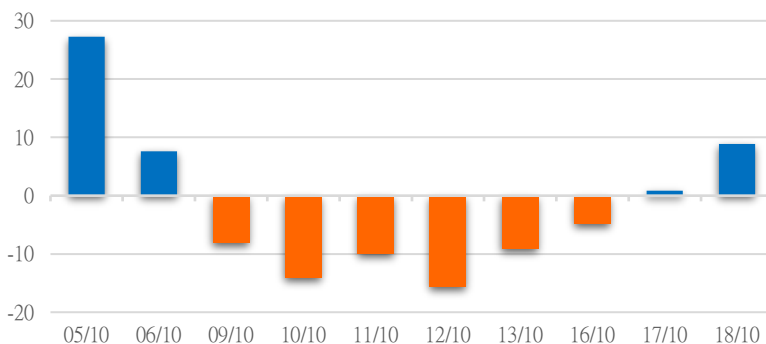
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	23,763	SHS	9,476
PVI	1,315	MBS	3,705
INN	176	PVS	2,134
IVS	114	NVB	575
SLS	62	EID	513

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)
BSR	13,268	VEA	5,184
MCH	1,913	ABI	3,614
VTP	1,428	PAT	1,443
DDV	430	VHG	211
ACV	392	TTN	91

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)
VPB	86,928	FIR	26,734
MWG	24,334	MBB	3,971
FUEVFNVD	19,323	TCB	3,779
VRE	9,141	PVD	3,180
HPG	8,903	FUEDCMD	2,853

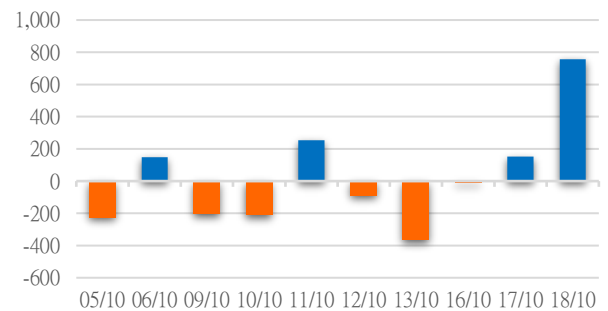
HSX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
GKM	26,755.60	IDC	344
PVS	17,688.68	PSI	1.6
MBS	297.30	SCI	1.1

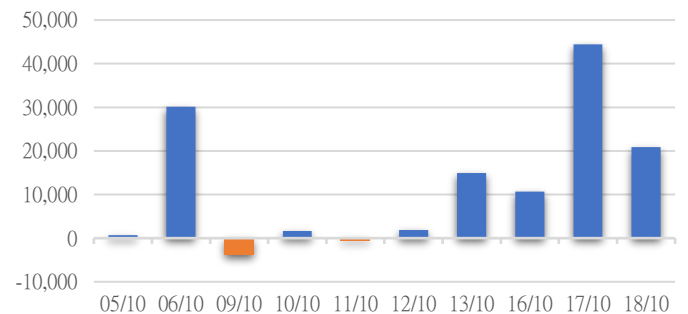
HNX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)

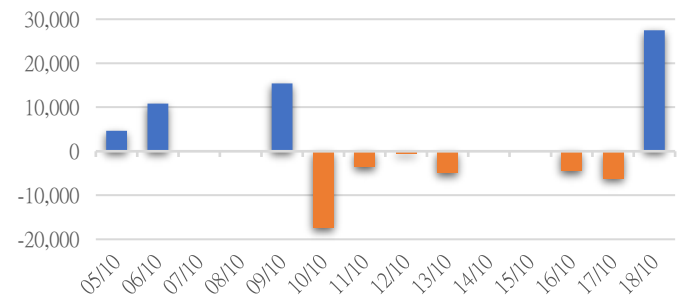
HSX 自營交易每日買/賣超 (Bil.VND)



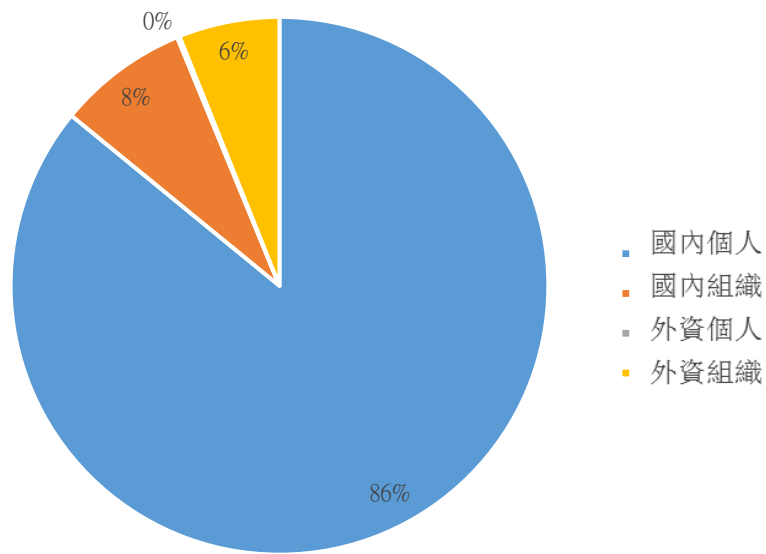
HNX 自營交易每日買/賣超 (Mil.VND)



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

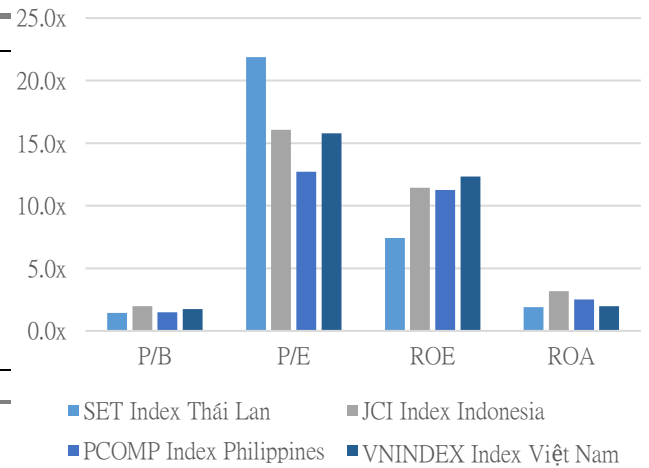
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.5x	1.6x
P/E		21.9x	16.1x	12.7x	13.9x
ROE	%	7.42	11.44	11.26	12.33
ROA	%	1.90	3.17	2.51	1.98
Vốn hóa	Tỷ USD	475.03	652.52	153.76	185.12
GTGD	Triệu USD	1.22	0.56	0.03	0.50
LS cổ tức	%	3.17	3.88	2.63	1.60

源: Bloomberg & YSVN



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

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