

當日市場：房地產和化工股大幅上漲

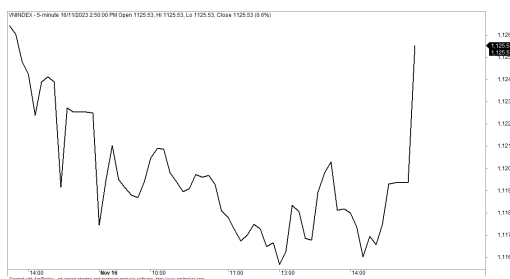
2023/11/17

市場走勢

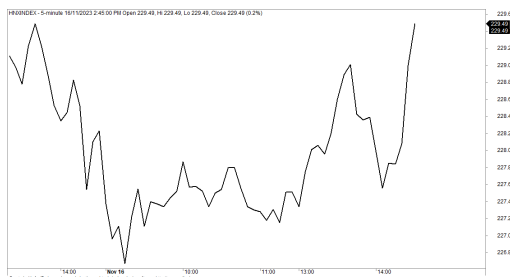
市場指數	VNI	HNI	UPCOM
收盤	1,125.53	229.56	87.13
%日	0.27%	0.74%	0.14%
%週	0.81%	0.37%	0.96%
%月	-2.79%	-4.67%	-1.02%
%年	23.09%	29.64%	37.44%
成交值(Bil.VND)			
當日	14,746	2,388	518
日均量/週	19,061	2,138	591
日均量/月	15,537	1,925	611
外資進出			
買進	1,026.64	24.49	25.78
賣出	1,152.34	94.64	38.53
買賣超	-125.71	-70.15	-12.75
市場漲跌家數			
上漲	189	94	126
下跌	116	66	178
持平	110	173	599
市場指標			
P/E	13.52	20.01	17.74
總市值 (兆盾)	4,488	302	1,065
股息殖利 ²	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在大部分時間在窄幅波動並猶豫不決，這也是 11 月期貨合約到期日。需求在 ATC 的交易日中更加活躍，幫助股指復甦並收漲。具體而言，VN-Index 收漲 0.27%，止於 1,125.53 點，HNX-Index 上漲 0.74%，Upcom-Index 上漲 0.14%。3 大市場的交易額均達到 17 兆 6,530 億越南盾。

大型股在寬幅內復甦，但現金流仍然謹慎。VN30-Index 小幅上漲，流動性接近 50 億越南盾。GVR、SAB、SSI、PLX 錄得約 1% 的漲幅。相反，VRE、TPB、MWG 下跌約 1%。

當國會主席正在研究向國會提交《土地法》的計劃時，中小型房地產股在當日表現最積極。DLG、DIG、NVL、DXG、HQC 等股票上漲超過 3%。此外，化工股也表現積極，如 LAS、BFC、DDV 等。

外資處於買賣交替的情況，他們再次賣超近 2,110 億越南盾，其中 VHM (880 億)、MWG (810 億)、VNM (670 億) 被拋售最多的股票。相反，SSI (430 億)、KBC (280 億)、DIG (240 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繼續上漲，VN-Index 可能會測試 50 日均線 (即 1,135 點)。同時，市場仍處於積極劇烈波動的時期，因此調整期可能會快速結束，流動性預計在未來幾個交易日可能會再次增加。此外，短期情緒指標持續上漲，顯示投資者對當前市場走勢仍持樂觀態度。

大盤的短期走勢仍維持上漲。因此，我們建議短期投資者可以繼續利用調整期的機會以增加持股比例，並買進新股。

請在 <https://ysradar.yuanta.com.vn/> 查看有關股票的信號。



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

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1125.53	0.27%
VN30	1132.6	0.06%
VN Mid	1688.98	0.91%
VN Small	1334.22	1.02%

河內交易所 (HSX)

	收盤	漲跌%
HNI	229.56	0.74%
HN30	486.28	1.95%
VNX AllSh	1145.23	0.36%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	87.13	0.14%

外資交易	成交值 (Bil.VND)
買進	1026.63549
賣出	1152.34236
買超/賣超	-125.706874

外資交易	成交值 (Bil.VND)
買進	24.49
賣出	94.64
買超/賣超	-70.15

外資交易	成交值 (Bil.VND)
買進	25.78
賣出	38.53
買超/賣超	-12.75

上漲排名/股碼	漲跌(VND)	漲跌%
CTR	5600	7.00%
BFC	1400	6.93%
ELC	1600	6.85%
PSH	650	6.84%
QBS	160	6.81%

上漲排名/股碼	漲跌(VND)	漲跌%
CMS	1800	9.57%
LAS	800	6.25%
DL1	200	4.88%
CEO	900	3.98%
VGS	600	2.80%

上漲排名/股碼	漲跌(VND)	漲跌%
PPH	0	4.56%
BIG	0	3.68%
DDV	0	2.97%
VGI	0	1.79%
ACV	0	1.69%

下跌排名/股碼	漲跌(VND)	漲跌%
RDP	-300	-3.00%
MHC	-210	-2.07%
HSL	-150	-1.55%
BMP	-1300	-1.35%
FRT	-1400	-1.33%

下跌排名/股碼	漲跌(VND)	漲跌%
VMS	-3500	-10.00%
DXP	-400	-3.01%
MST	-100	-1.89%
S99	-100	-1.03%
SCG	-400	-0.62%

下跌排名/股碼	漲跌(VND)	漲跌%
NCG	-736	-3.50%
LTG	-730	-2.99%
DSC	-497	-2.76%
TVN	-162	-2.57%
SBS	-184	-2.45%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	Bil.VND
VCB	491,840,031
BID	221,310,417
GAS	183,739,188
VHM	179,182,222
VIC	172,008,494

市值排名/股碼	Bil.VND
HUT	18,296,495
PVS	17,875,939
IDC	16,433,996
SHS	14,718,137
THD	13,898,499

市值排名/股碼	Bil.VND
ACV	157,391,340
VGI	81,793,295
BSR	59,256,749
MCH	57,608,905
VEA	50,797,366

交易量排名/股碼	成交值	30 日均
EIB	38,529,668	13,476,736
VIX	36,178,200	34,704,457
NVL	35,878,200	24,278,966
DIG	28,743,000	22,169,656
SSI	19,073,100	26,138,051

交易量排名/股碼	成交值	30 日均
CEO	#####	12,981,021
SHS	285,114,039,200	33,892,342
PVS	151,045,938,600	6,559,160
HUT	80,620,527,300	6,848,350
MBS	64,520,008,800	4,819,323

交易量排名/股碼	成交值	30 日均
BSR	131,649,183,700	8,646,328
VGI	57,702,149,600	1,347,960
SBS	13,068,139,100	2,440,048
VEA	51,330,432,500	534,831
BOT	4,687,745,200	1,321,691

資料源: Bloomberg & Yuanta Research

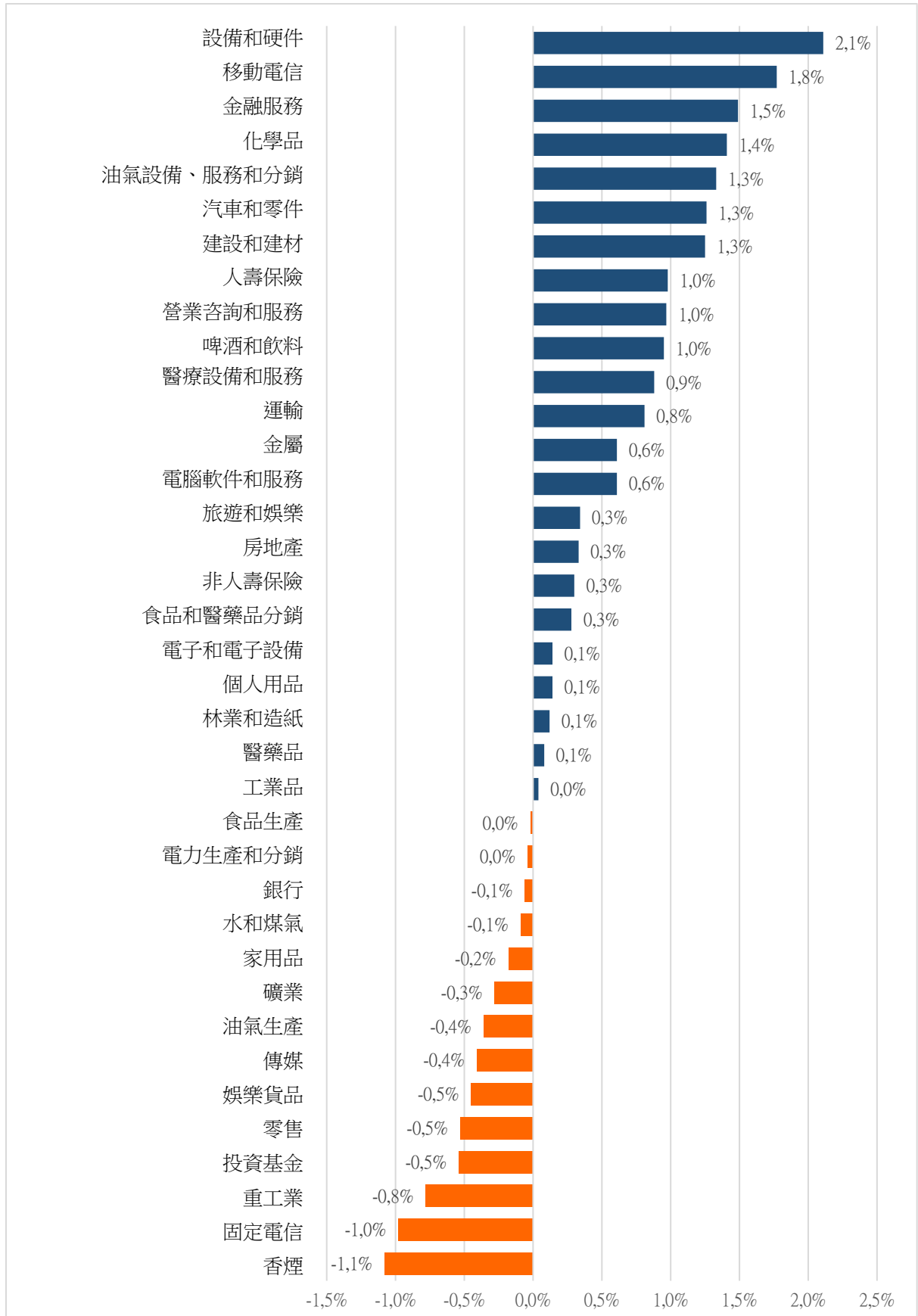
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



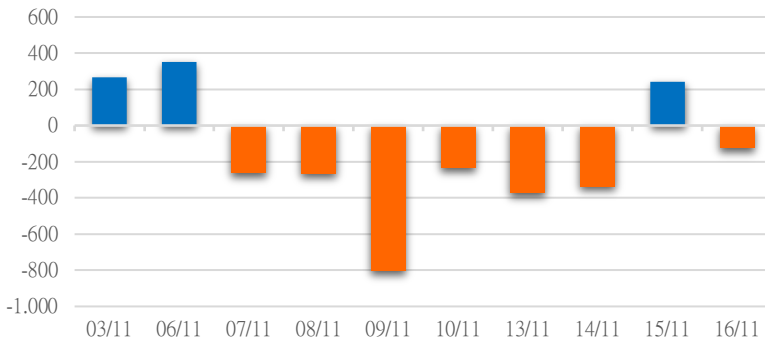
資料源: FiinPro - YSVN



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外資買進賣統計

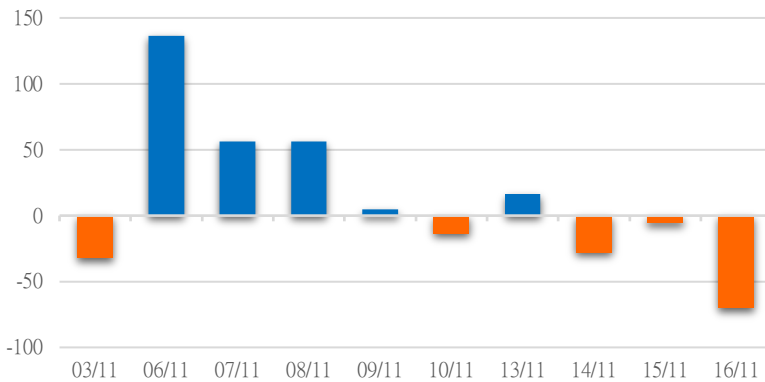
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SSI	43,140	VHM	-87,962
KBC	27,850	MWG	-81,098
DIG	24,211	VNM	-66,877
VIX	23,374	VRE	-56,120
VND	22,376	FRT	-34,125

HSX 外資買/賣超的前 5 名

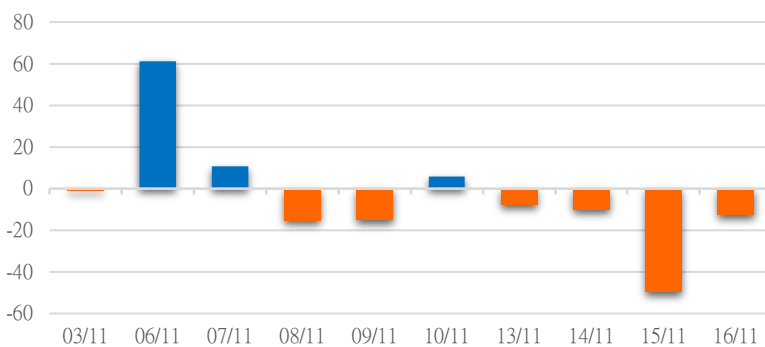
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SHS	447	CEO	-54,114
IDC	318	PVS	-10,393
HUT	159	TIG	-3,161
APS	71	TNG	-2,076
TSB	53	LAS	-368

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	6,925	VEA	-18,268
VTP	2,417	LTG	-5,990
BSR	1,475	QTP	-1,415
MCH	884	NCG	-82
NAB	529	FOC	-65

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



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自營統計

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
NVL	95,360	GEX	20,895
STB	53,637	KBC	12,309
EVF	39,339	DXG	11,018
FPT	27,631	GMD	4,205
FUEVFNVD	19,724	FUESSV30	2,830

HSX 自營交易最大前名

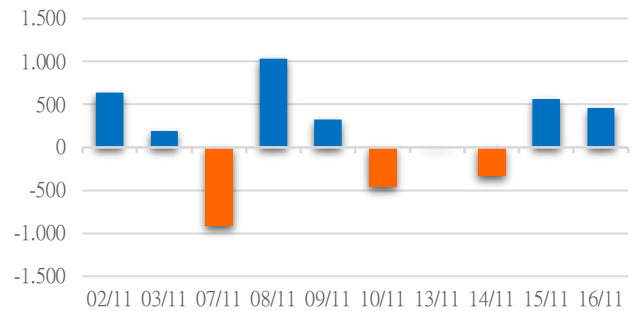
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	3,662	PVS	17,080
CEO	2,205	MBS	170
NTP	11		

HNX 自營交易最大前名

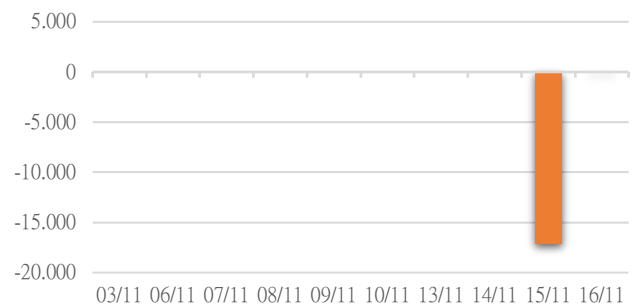
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VTP	7,250.31		
VEA			

UPCoM 自營交易最大前名

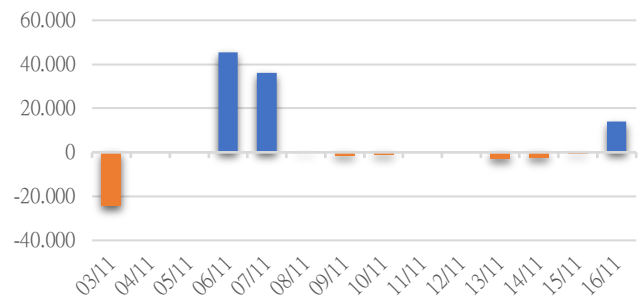
HSX 自營交易每日買/賣超 (BilVND)



HNX 自營交易每日買/賣超 (BilVND)



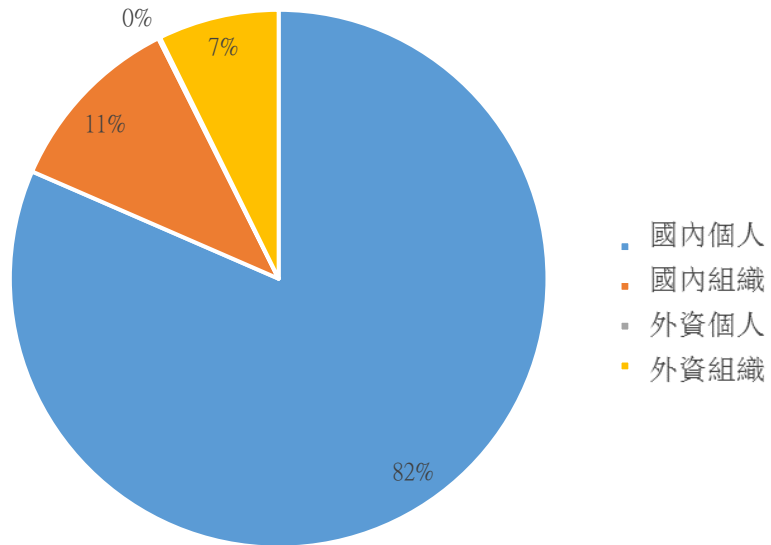
UPCoM 自營交易每日買/賣超 (BilVND)





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越南證券市場投資人類別統計



資料源: FiinPro - YSVN



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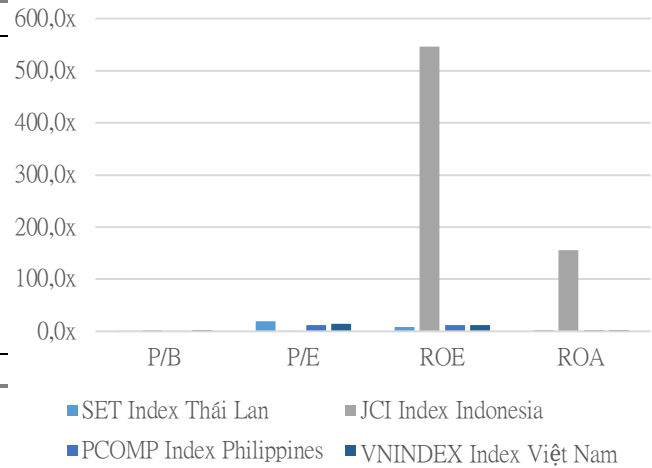
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	1.9x	1.5x	1.6x
P/E		18.5x	0.1x	11.9x	14.7x
ROE	%	8.00	546.33	11.99	11.79
ROA	%	1.92	156.15	2.60	1.88
Vốn hóa	Tỷ USD	479.84	696.43	152.60	184.05
GTGD	Triệu USD	1.26	0.41	0.04	0.64
LS cổ tức	%	3.19	3.84	2.66	1.81

源: Bloomberg & YSVN



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



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