

當日市場：市場處於強勁的調整階段

2023/12/14

市場走勢

市場指數	VNI	HNI	UPCOM
<b>收盤</b>	1,114.20	228.42	85.09
%日	-1.19%	-1.42%	-0.31%
%週	-1.09%	-2.23%	-1.41%
%月	1.28%	1.02%	-1.04%
%年	6.37%	6.94%	18.44%
<b>成交值(Bil.VND)</b>			
當日	18,415	2,300	685
日均量/週	18,423	2,251	590
日均量/月	17,462	2,119	589
<b>外資進出</b>			
買進	1,526.70	210.13	15.86
賣出	2,438.28	148.57	28.87
買賣超	-911.58	61.56	-13.01
<b>市場漲跌家數</b>			
上漲	66	50	142
下跌	273	113	166
持平	76	168	595
<b>市場指標</b>			
P/E	13.43	20.11	17.46
總市值 (兆盾)	4,451	303	1,049
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

在經歷了近期的猶豫以及中國國家主席的持續訪問之後，市場再次強勁調整。VN-Index 下跌 1.19%，止於 1114.2 點，HNX-Index 下跌 1.42%，Upcom-Index 下跌 0.31%。3 大市場的交易額均達到 21 兆 4,000 億越南盾。

跌幅在當日完全占主導地位，其中強勁的拋售壓力僅集中在一些股票，如 PLX、TPB、HPG、VRE 和 VNM 等下跌約 2%。相反，VJC (0.48%)、HDB (0.28%) 和 BVH (1%) 在 VN30-Index 中上漲。

在世界油價下跌 4% 的背景下，油氣股在當日大幅下跌。此外，證券和房地產股在近期繼續下跌，如 VIX (-2.92%)、SSI (-1.84%)、PDR (2.59%)、DIG (2.09%)、KBC (2.33%) 等。

外資繼續賣超 8,660 億越南盾，其中 VNM (1,300 億)、FUEVFVND (1,140 億)、STB (820 億) 被拋售最多的股票。相反，IDC (770 億)、VCB (280 億)、VHC (240 億) 在買超方面領先。

市場短期觀點

我們認為市場可能會再次上漲，VN-Index 可能在下一個交易日在 200 日均線附近波動。同時，市場出現回歸短期調整階段的跡象，因此價格走勢圖在未來幾個交易日可能會再次在窄幅波動，隨著投資者情緒對當前市場走勢可能再持謹慎態度，流動性可能會回歸低位。此外，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，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。

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

技術分析圖



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	中性	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	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	1114.2	-1.19%
VN30	1106.83	-1.28%
VN Mid	1695.22	-1.48%
VN Small	1357.36	-1.16%

**河內交易所 (HSX)**

	收盤	漲跌%
HNI	228.42	-1.42%
HN30	491.1	-2.25%
VNX AllSh	1130.93	-1.33%

**UPCOM 市場 (UPCoM)**

	收盤	漲跌%
UPCoM	85.09	-0.31%

外資交易	成交值 (Bil.VND)
買進	1526.701075
賣出	2438.281947
買超/賣超	-911.580872

外資交易	成交值 (Bil.VND)
買進	210.13
賣出	148.57
買超/賣超	61.56

外資交易	成交值 (Bil.VND)
買進	15.86
賣出	28.87
買超/賣超	-13.01

上漲排名/ 股碼	漲跌(VND)	漲跌%
KPF	380	6.95%
OPC	1000	4.35%
HAG	450	3.44%
APG	300	2.93%
VNE	160	2.38%

上漲排名/ 股碼	漲跌(VND)	漲跌%
SMT	500	8.77%
HTP	1100	8.21%
PGS	1000	3.73%
VNC	1000	1.98%
INN	800	1.88%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PSP	0	10.95%
VHG	0	10.59%
LCM	0	9.36%
DSC	0	5.33%
NED	0	3.37%

下跌排名/ 股碼	漲跌(VND)	漲跌%
NHH	-1350	-6.78%
POM	-310	-5.34%
DLG	-110	-4.31%
PSH	-450	-4.07%
NVL	-700	-3.95%

下跌排名/ 股碼	漲跌(VND)	漲跌%
PTI	-4900	-9.84%
CMS	-1000	-5.21%
VC7	-800	-5.03%
DTD	-1200	-4.65%
TC6	-400	-4.65%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BCR	-1175	-9.96%
HSV	-751	-9.75%
GDA	-500	-2.09%
QTP	-288	-2.00%
TVN	-130	-2.00%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	467,806,939
BID	237,138,133
VHM	177,440,475
GAS	176,619,294
VIC	167,431,771

市值排名/ 股碼	Bil.VND
HUT	18,385,746
PVS	18,114,922
IDC	16,763,996
SHS	14,799,453
THD	13,474,999

市值排名/ 股碼	Bil.VND
ACV	141,614,980
VGI	78,454,234
MCH	61,563,525
BSR	58,196,378
VEA	43,667,026

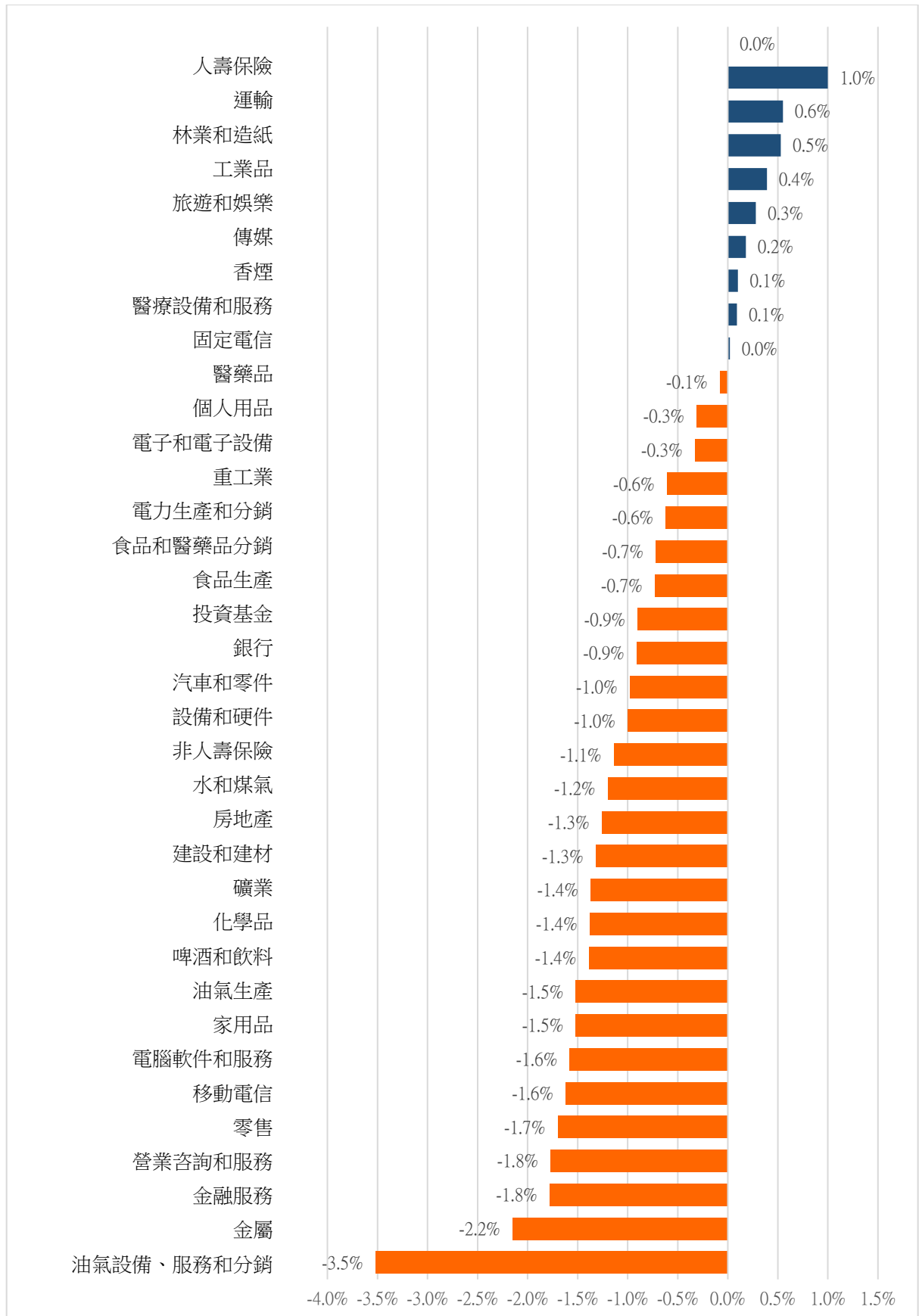
交易量排名/ 股碼	成交值	30 日均
HPG	33,557,700	27,678,297
VIX	29,221,900	39,696,177
HAG	27,661,300	25,670,303
EIB	26,911,740	21,025,482
DXG	24,712,000	23,366,993

交易量排名/ 股碼	成交值	30 日均
SHS	377,619,110,400	30,561,158
CEO	377,103,747,300	19,146,665
HUT	201,522,303,500	6,807,981
PVS	372,160,440,200	6,096,556
EVS	2,548,837,000	1,073,552

交易量排 名/股碼	成交值	30 日均
VHG	30,204,262,000	1,133,100
BSR	120,766,266,800	7,075,969
SII	420,000	92,230
BCR	28,396,667,700	0
C4G	19,221,998,700	1,668,320

資料源: Bloomberg & Yuanta Research

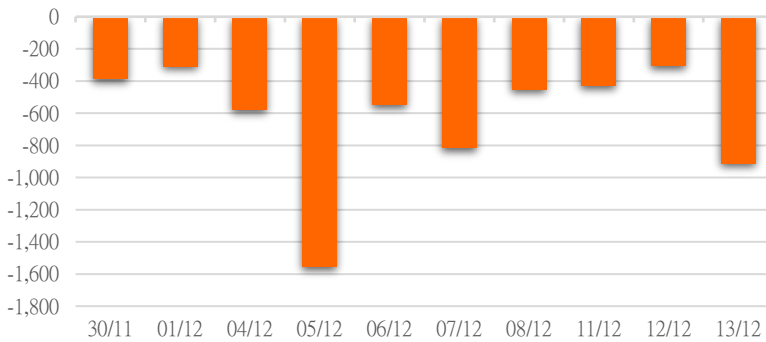
各行業板塊的交易走勢



資料源: FiinPro - YSVN

外資買進賣統計

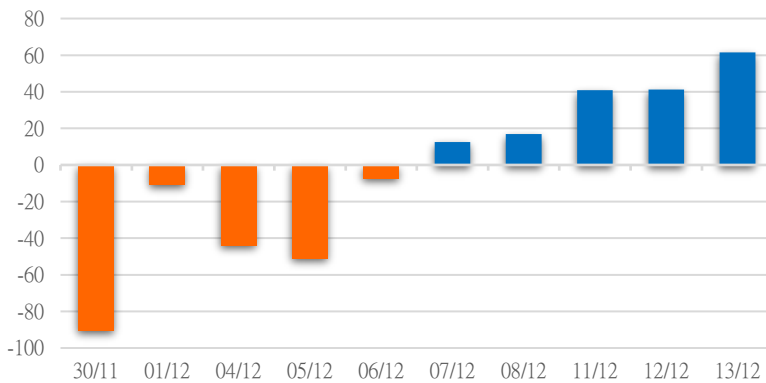
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VCB	31,480	VNM	-129,957
VHC	23,923	FUEVFNVD	-114,233
BCM	20,789	STB	-81,829
VJC	18,402	HPG	-65,043
HDG	7,495	VHM	-46,785

HSX 外資買/賣超的前 5 名

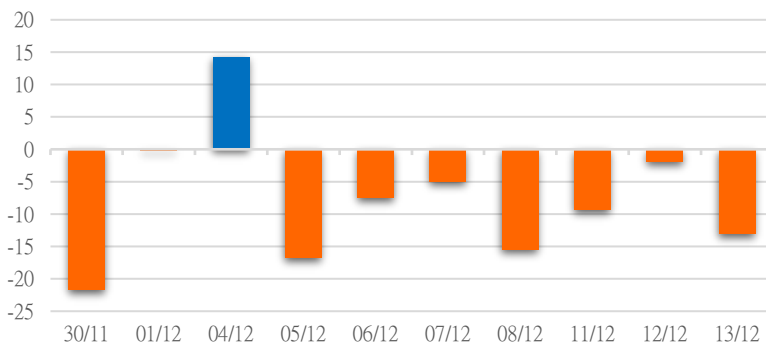
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	76,996	PVS	-17,389
LAS	4,045	DHT	-1,035
TNG	197	HUT	-415
TOT	165	BAX	-411
SLS	160	CEO	-205

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)
VHG	1,221	QNS	-12,565
MPC	717	ACV	-2,676
MCH	520	TCI	-1,281
LTG	518	VSE	-239
MML	323	GDA	-236

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	99,230	DBC	12,439
KBC	5,015	KOS	10,509
PDR	2,442	HPG	8,901
HSG	2,191	FPT	8,437
E1VFN30	833	MSN	6,359

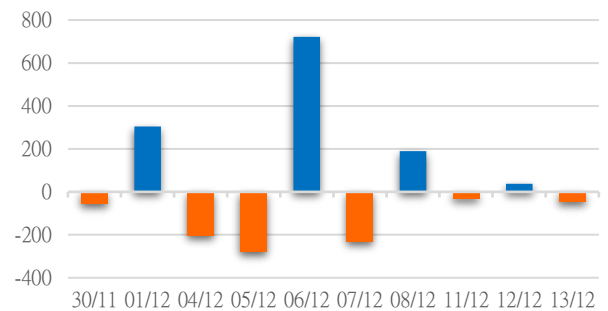
HSX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
HTP	8,418	CEO	9
PVS	2,837	TNG	4
NTP	22	VGS	2
		SHS	2

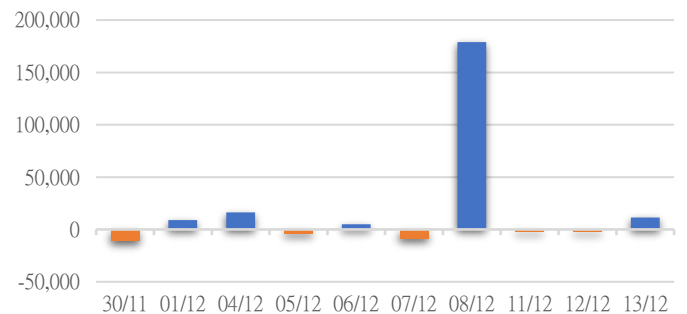
HNX 自營交易最大前名

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MCH	523.90	VEA	3,303
		QTP	2,823
		BCR	1,283
		ACV	584
		GDA	236

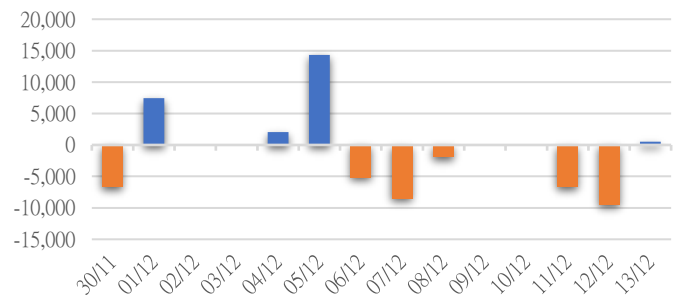
HSX 自營交易每日買/賣超 (Bil.VND)



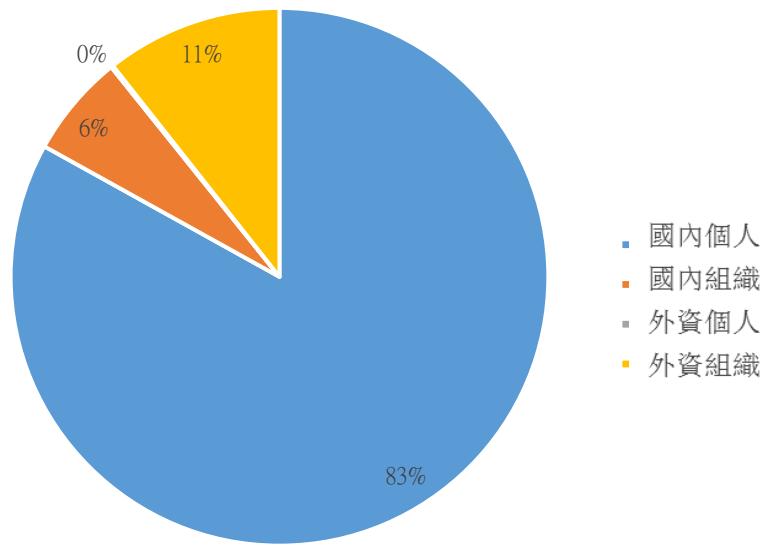
HNX 自營交易每日買/賣超 (Mil.VND)



UPCoM 自營交易每日買/賣超 (Mil.VND)

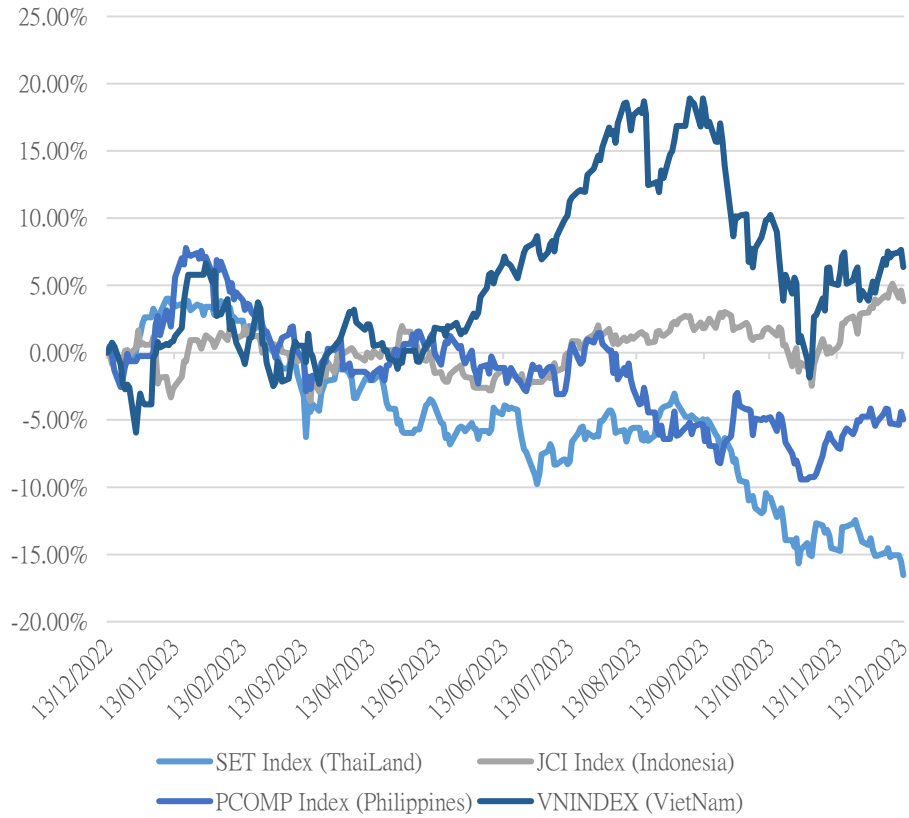


越南證券市場投資人類別統計



資料源: FiinPro - YSVN

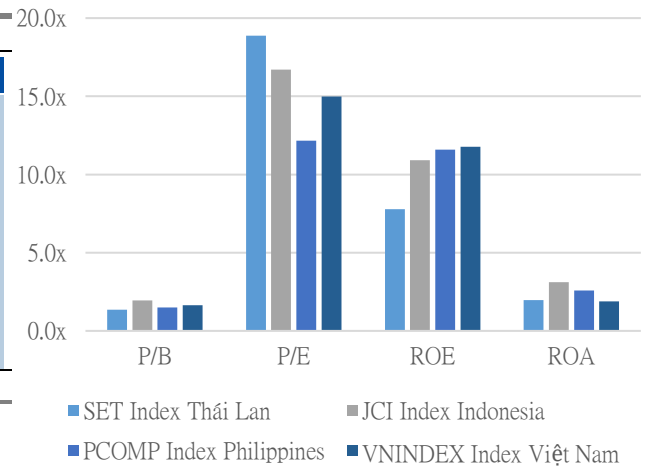
東南亞主要市場走勢比較



**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		18.9x	16.7x	12.2x	15.0x
ROE	%	7.78	10.91	11.60	11.76
ROA	%	1.98	3.12	2.58	1.88
Vốn hóa	Tỷ USD	471.07	731.02	156.00	187.16
GTGD	Triệu USD	0.91	0.71	0.04	0.45
LS cổ tức	%	3.33	3.81	2.64	1.81

源: Bloomberg & YSVN





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