

當日市場：市場繼續上漲

2023/12/27

市場走勢

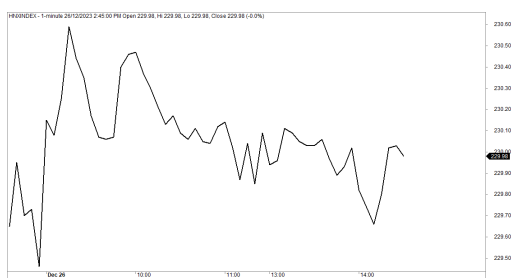
市場指數	VNI	HNI	UPCOM
收盤	1,122.25	231.26	86.24
%日	0.41%	0.79%	0.04%
%週	2.36%	1.65%	1.57%
%月	2.01%	1.48%	1.44%
%年	9.54%	11.76%	21.41%
<b>成交值(Bil.VND)</b>			
當日	14,704	1,207	1,446
日均量/週	12,937	1,344	567
日均量/月	15,552	1,777	564
<b>外資進出</b>			
買進	1,079.72	16.77	27.74
賣出	1,393.83	43.53	39.84
買賣超	-314.11	-26.75	-12.10
<b>市場漲跌家數</b>			
上漲	181	94	160
下跌	130	61	136
持平	103	175	607
<b>市場指標</b>			
P/E	13.53	19.44	17.55
總市值 (兆盾)	4,484	305	1,054
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在盤中的大部分時間在窄幅波動，需求在尾盤強勁增加是亮點。VN-Index 收盤上漲 0.41%，止於 1122.25 點，HNX-Index 上漲 0.79%，Upcom-Index 小幅上漲。3 大市場的交易額均達到 17 兆 3,570 億越南盾。

儘管指數大幅上漲，但整個市場並沒有形成明確的共識。大型股再次分化，其中 SAB (1.13%)、FPT (1.25%)、HPG (1.28%)、VCB (1.22%)、VHM (1.7%) 是上漲的股票。相反，ACB、BID、CTG、GAS、PLX、POW 等下跌但跌幅並不大。

其餘股票沒有太多顯著的走勢，一些股票如 HVN 在連續第二個交易日漲停或 ELC (4%)、CTD (5.6%) 創下新高。相反，HAG、HNG、PVT、HDG 等弱於大盤。

外資持續賣超 3,490 億越南盾，其中 VHM (660 億)、VND (580 億) 和 SSI (570 億) 被拋售最多的股票。相反，CTG (240 億)、VCB (220 億)、MSN (150 億) 在買超方面領先。

市場短期觀點

我們認為市場可能會在下一個交易日出現調整，VN-Index 可能會在 200 日均線附近波動。同時，市場仍處於短期調整階段，因此 VN-Index 在未來幾個交易日可能無法完全突破 200 日均線。2023 年 12 月 26 日的積極是，現金流有回流大型股的跡象，但技術指標逐漸進入超買區域，因此市場在未來幾個交易日可能會持續出現調整。此外，情緒指標持續小幅上漲，但指標仍處於悲觀區域。

大盤的短期趨勢從中性調整至上漲。因此，我們建議短期投資者可以考慮以高位增加持股比例。

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	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

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1122.25	0.41%
VN30	1115.52	0.33%
VN Mid	1718.56	0.46%
VN Small	1365.71	0.01%

河內交易所 (HSX)

	收盤	漲跌%
HNI	231.26	0.79%
HN30	495.35	0.50%
VNX AllSh	1141.58	0.34%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	86.24	0.04%

外資交易	成交值 (Bil.VND)
買進	1079.71856
賣出	1393.83248
買超/賣超	-314.113913

外資交易	成交值 (Bil.VND)
買進	16.77
賣出	43.53
買超/賣超	-26.75

外資交易	成交值 (Bil.VND)
買進	27.74
賣出	39.84
買超/賣超	-12.10

上漲排名/股碼	漲跌(VND)	漲跌%
HVN	800	6.81%
CTD	3700	5.62%
ELC	800	4.02%
ITA	260	3.99%
DPR	1100	3.68%

上漲排名/股碼	漲跌(VND)	漲跌%
HTP	1700	9.88%
NVB	1000	9.71%
KDM	1400	6.64%
TIG	500	4.13%
TKG	200	2.90%

上漲排名/股碼	漲跌(VND)	漲跌%
SEA	0	8.86%
HSV	0	4.25%
DGT	0	3.61%
BCR	0	3.37%
SGP	0	2.99%

下跌排名/股碼	漲跌(VND)	漲跌%
YEG	-450	-3.90%
HNG	-110	-2.68%
DBD	-1200	-2.21%
VSC	-650	-2.17%
GMD	-1500	-2.05%

下跌排名/股碼	漲跌(VND)	漲跌%
L18	-1300	-3.13%
DVM	-300	-2.50%
MST	-100	-1.72%
VC3	-400	-1.61%
VFS	-300	-1.54%

下跌排名/股碼	漲跌(VND)	漲跌%
BIG	-517	-5.22%
BCA	-240	-3.33%
DSC	-427	-2.20%
SBB	-244	-1.55%
VCR	-372	-1.40%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	Bil.VND
VCB	462,776,756
BID	245,118,744
VHM	182,447,998
GAS	175,470,924
VIC	166,520,461

市值排名/股碼	Bil.VND
PVS	18,545,092
HUT	17,582,486
IDC	17,192,996
SHS	15,206,031
THD	13,628,999

市值排名/股碼	Bil.VND
ACV	141,292,791
VGI	79,062,996
MCH	61,905,318
BSR	57,492,564
VEA	45,289,490

交易量排名/股碼	成交值	30 日均
HPG	33,842,900	26,045,676
EIB	33,533,700	20,037,342
GEX	22,742,900	17,467,475
SHB	18,659,900	18,925,061
VND	18,504,700	24,882,736

交易量排名/股碼	成交值	30 日均
SHS	222,924,022,200	22,925,516
CEO	146,482,992,200	13,459,413
EVS	1,246,836,500	1,873,830
TIG	45,934,398,800	3,133,741
PVS	120,109,861,700	4,786,604

交易量排名/股碼	成交值	30 日均
SEA	986,050,000	1,129,200
DGT	3,260,816,000	899,964
NAB	9,427,335,600	1,344,592
KLB	42,550,000	224,271
BSR	44,393,669,300	5,244,038

資料源: Bloomberg & Yuanta Research

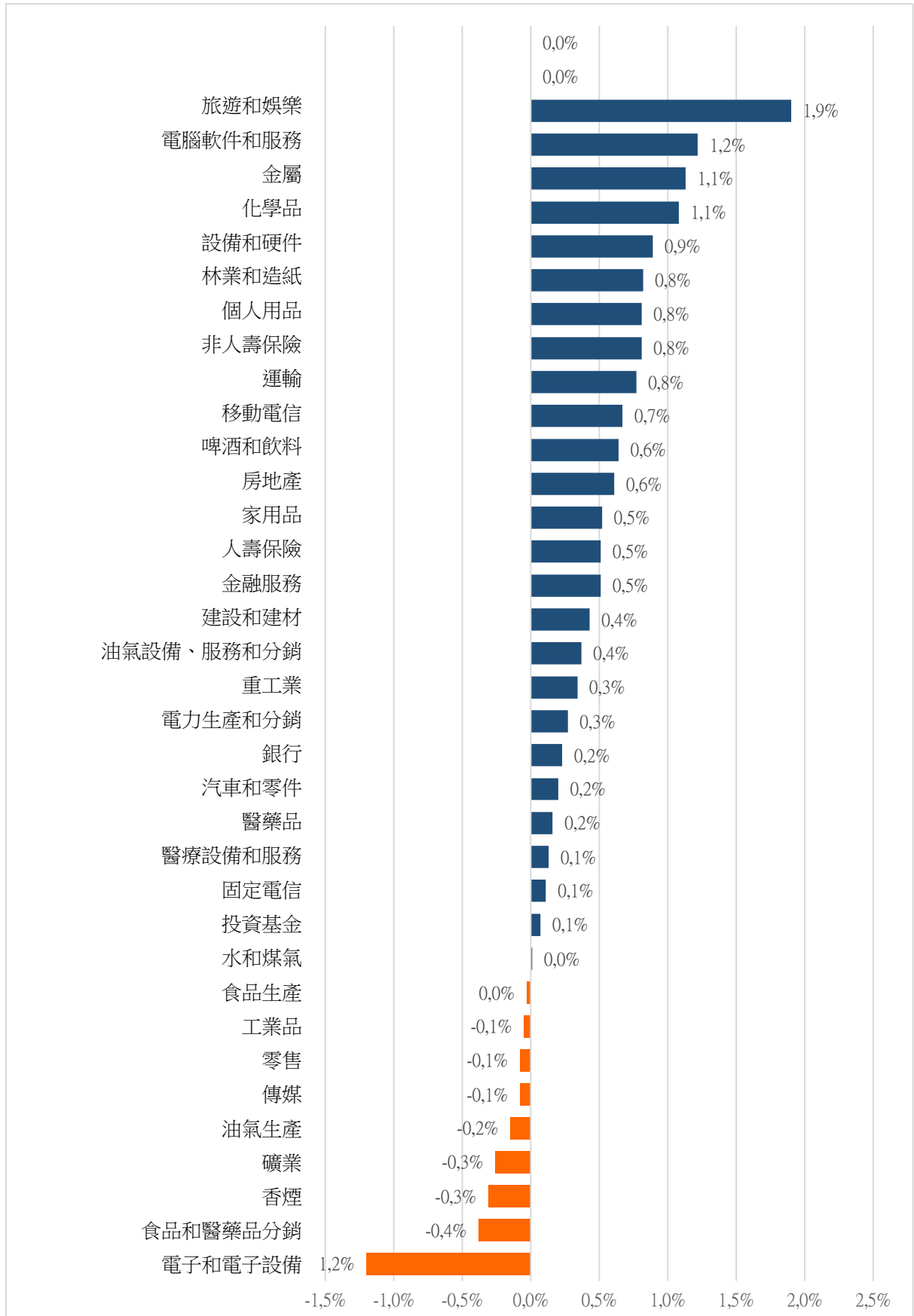
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



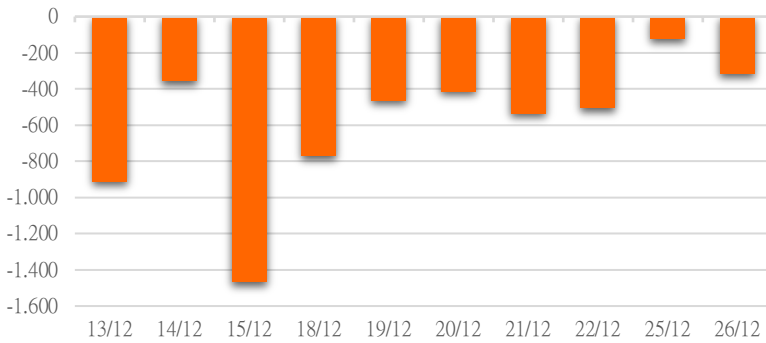
資料源:: FiinPro - YSVN



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## 外資買進賣統計

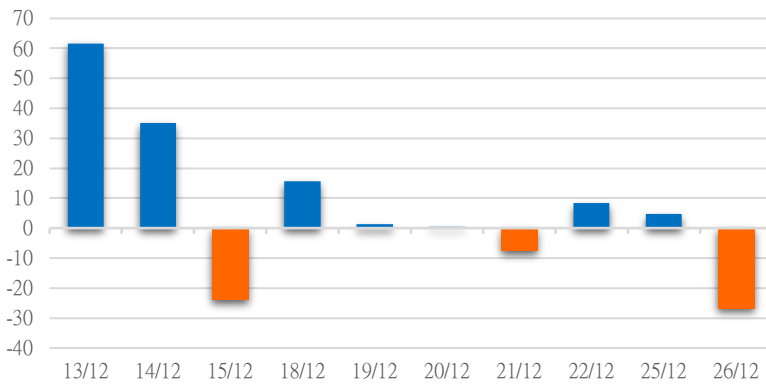
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
CTG	24,448	VHM	-65,976
VCB	22,197	VND	-58,158
MSN	14,737	SSI	-56,898
STB	12,994	VNM	-54,819
VJC	11,421	FUEVFNVD	-40,922

HSX 外資買/賣超的前 5 名

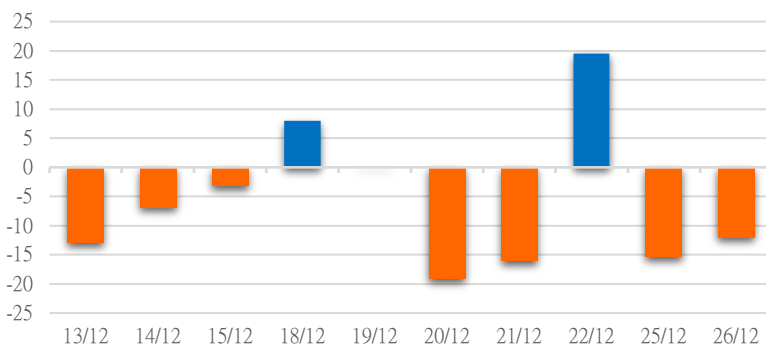
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TNG	5,122	SHS	-26,244
IDC	4,937	PVS	-8,777
PVB	434	TIG	-873
VGS	158	CEO	-679
APS	136	NVB	-257

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	1,867	VTP	-8,967
VEA	1,057	QNS	-5,623
MCH	865	ACV	-2,446
LTG	268	GDA	-250
VGG	211	CSI	-39

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)
FUEVFNVD	99,315	TCB	86,426
DBC	34,381	EIB	73,584
VHC	27,871	HPG	49,137
PLX	16,751	FPT	38,416
ASM	15,479	HAH	30,376

HSX 自營交易最大前名

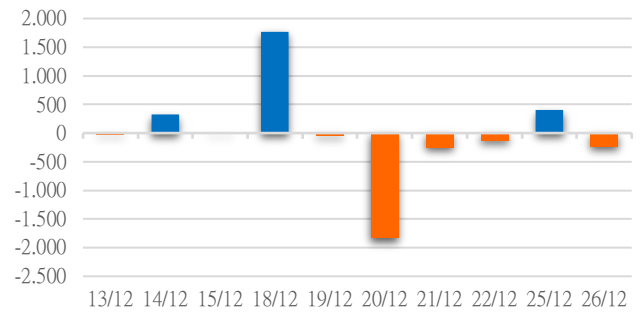
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
GKM	8,247	PVS	2,728
PVI	104	NTP	7
IDC	35		

HNX 自營交易最大前名

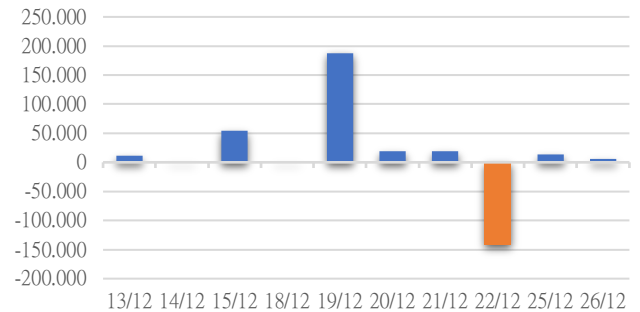
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
ACV	8,928.79	NAB	65,750
QNS		GDA	250

UPCoM 自營交易最大前名

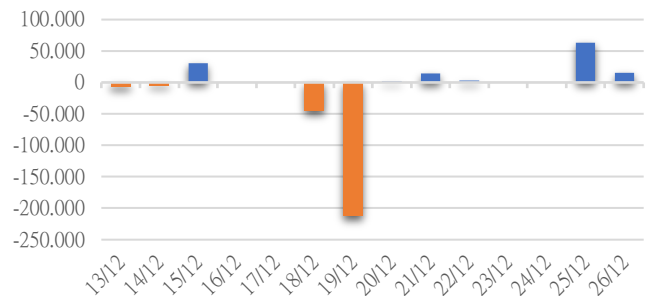
HSX 自營交易每日買/賣超 (BilVND)



HNX 自營交易每日買/賣超 (BilVND)



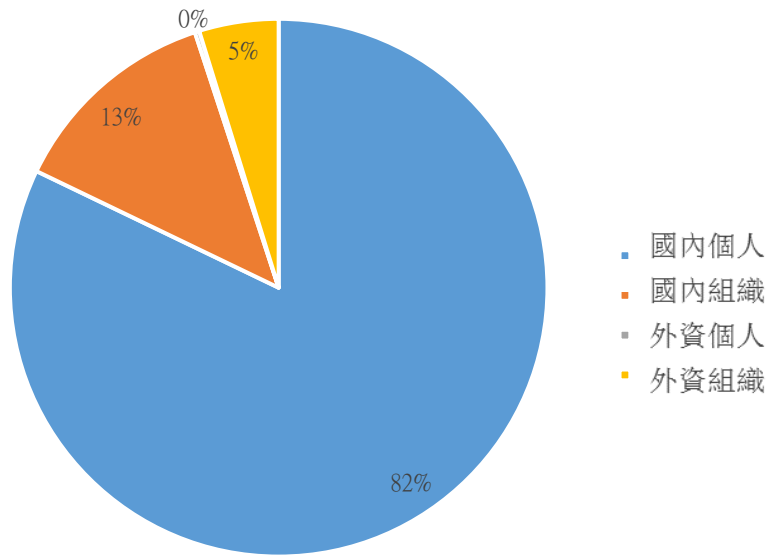
UPCoM 自營交易每日買/賣超 (BilVND)





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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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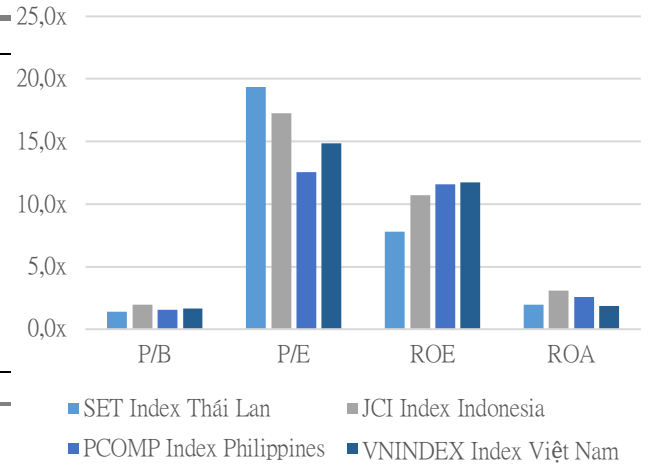
### 東南亞主要市場走勢比較



### 東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.6x	1.6x
P/E		19.3x	17.3x	12.6x	14.9x
ROE	%	7.78	10.73	11.60	11.75
ROA	%	1.98	3.08	2.58	1.88
Vốn hóa	Tỷ USD	500.17	753.65	162.24	185.47
GTGD	Triệu USD	0.59	0.43	0.04	0.49
LS cổ tức	%	3.22	3.65	2.60	1.82

源: Bloomberg & YSVN







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