

當日市場：短期獲利供應較為強勁

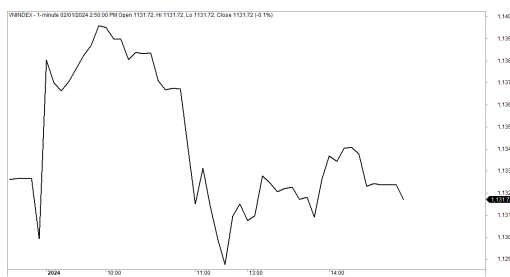
2024/01/03

市場走勢

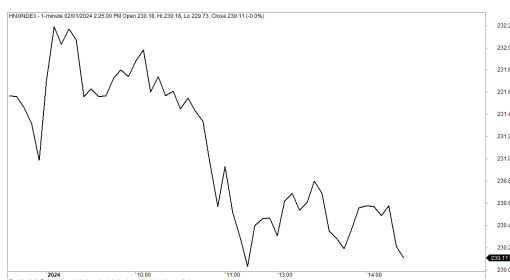
市場指數	VNI	HNI	UPCOM
收盤	1,131.72	229.99	87.58
%日	0.16%	-0.46%	0.62%
%週	0.84%	-0.55%	1.55%
%月	2.68%	1.65%	2.81%
%年	12.38%	12.02%	22.23%
成交值(Bil.VND)			
當日	17,084	1,239	572
日均量/週	16,906	1,211	835
日均量/月	16,363	1,700	684
外資進出			
買進	785.96	10.90	10.21
賣出	1,139.10	40.15	52.60
買賣超	-353.14	-29.25	-42.39
市場漲跌家數			
上漲	151	78	157
下跌	172	75	142
持平	92	177	604
市場指標			
P/E	13.65	19.41	17.78
總市值 (兆盾)	4,525	305	1,061
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在尾盤處於強勁震盪的階段，短期獲利供應占主導地位。VN-Index 收漲 0.16%，止於 1131.72 點，HNX-Index 下跌 0.46%，Upcom-Index 上漲 0.62%。3 大市場的交易額均達到 18 兆 8,940 億越南盾。

銀行板塊處於分化階段，但仍持樂觀態度，如 ACB (2.3%)、VCB (3.99%)、SHB (1.39%)、VIB (1.02%) 上漲，而 STB (-0.72%)、HDB (-1.97%)、VPB (-1.82%) 下跌。此外，其他大型股如 BCM、GVR、HPG、VIC 等收盤下跌 1-2%。

獲利壓力也擴散至整個市場，如鋼鐵股 (HPG、HSG、NKG)、房地產股 (NVL、DIG、PDR)，相反，HNG、HAG、TTF、ABS、ST8、NTL 是在當日逆市漲停的股票。

外資反轉賣超 4,270 億越南盾，其中 FUESSVFL (1,800 億)、SSI (890 億)、VRE (400 億) 被拋售最多的股票。相反，VCB (920 億)、VHC (240 億)、VCI (230 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保持上漲勢頭，VN-Index 可能會重新測試 1,131 點的支撐位。同時，大型股仍處於積極劇烈波動的時期，因此我們預期短期現金流可能會主要集中在該股票。不過，中小型股仍處於短期調整階段，因此各類股票在未來的幾個交易日可能會持續出現分化。此外，情緒指標小幅下跌，但仍處於樂觀區域。

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	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	1131.72	0.16%
VN30	1131.64	0.02%
VN Mid	1721.91	-0.44%
VN Small	1369.98	-0.11%

河內交易所 (HSX)

	收盤	漲跌%
HNI	229.99	-0.46%
HN30	489.89	-1.01%
VNX AllSh	1153.09	-0.12%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	87.58	0.62%

外資交易	成交值 (Bil.VND)
買進	785.960884
賣出	1139.10029
買超/賣超	-353.13941

外資交易	成交值 (Bil.VND)
買進	10.90
賣出	40.15
買超/賣超	-29.25

外資交易	成交值 (Bil.VND)
買進	10.21
賣出	52.60
買超/賣超	-42.39

上漲排名/股碼	漲跌(VND)	漲跌%
CRC	380	6.96%
NTL	1900	6.96%
ABS	400	6.91%
ST8	1250	6.83%
TTF	290	6.82%

上漲排名/股碼	漲跌(VND)	漲跌%
TKG	800	9.76%
NVB	300	2.86%
MBG	100	2.27%
LAS	300	2.14%
MST	100	1.64%

上漲排名/股碼	漲跌(VND)	漲跌%
CEN	0	5.09%
BIG	2447900	5.02%
ABB	0	4.22%
DSC	204835525	3.22%
VHG	72747983	2.86%

下跌排名/股碼	漲跌(VND)	漲跌%
GEX	-1450	-6.14%
BCG	-490	-5.56%
FIR	-1000	-5.13%
TLD	-280	-4.96%
HSL	-500	-4.95%

下跌排名/股碼	漲跌(VND)	漲跌%
HTP	-2400	-9.96%
VC2	-300	-2.83%
SHS	-400	-2.12%
HDA	-100	-2.04%
VFS	-400	-2.02%

下跌排名/股碼	漲跌(VND)	漲跌%
BCR	-1020	-9.90%
DGT	-119	-2.12%
VTD	-118	-1.53%
TCI	-203	-1.47%
PAT	-894	-0.96%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	Bil.VND
VCB	466,689,120
BID	245,118,744
VHM	187,237,802
GAS	173,633,532
VIC	168,241,109

市值排名/股碼	Bil.VND
PVS	18,114,922
HUT	17,850,239
IDC	16,895,996
SHS	15,043,400
THD	13,551,999

市值排名/股碼	Bil.VND
ACV	140,422,011
VGI	78,664,257
MCH	63,374,954
BSR	57,951,438
VEA	45,273,545

交易量排名/股碼	成交值	30 日均
VIX	53,580,576	26,991,159
GEX	47,563,137	18,063,022
SHB	43,194,046	18,311,211
VND	27,971,485	24,335,426
BCG	23,273,511	7,463,970

交易量排名/股碼	成交值	30 日均
SHS	322,317,636,700	21,789,519
CEO	157,795,103,100	12,369,509
HUT	78,755,811,800	7,222,059
MBS	73,341,977,200	4,025,632
IDC	132,670,425,200	2,882,782

交易量排名/股碼	成交值	30 日均
ABB	46,119,490,100	648,958
BSR	97,921,776,600	4,795,540
BCR	31,024,950,600	0
KLB	115,514,100	884,792
VHG	4,524,248,600	1,748,436

資料源: Bloomberg & Yuanta Research

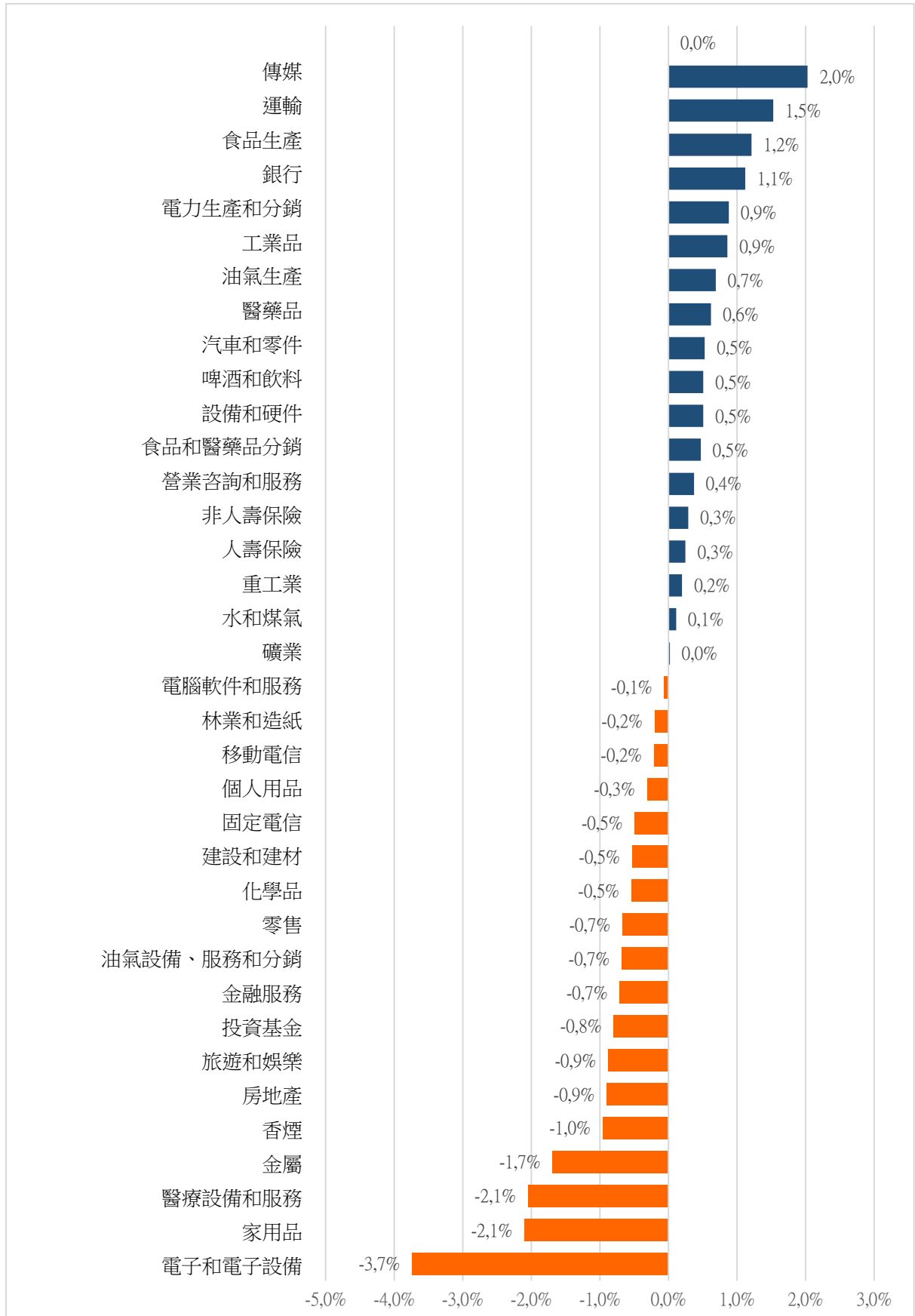
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



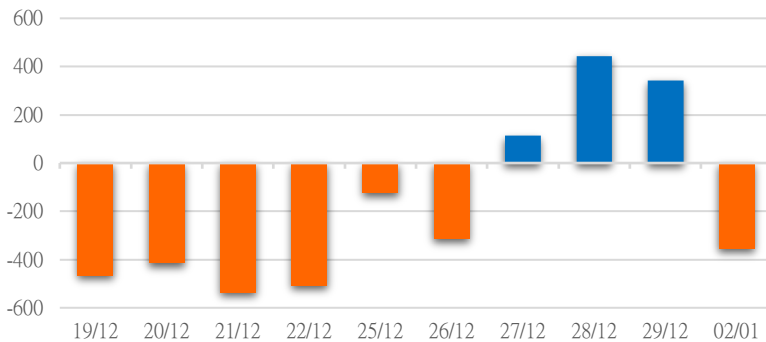
資料源: FiinPro - YSVN



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外資買進賣統計

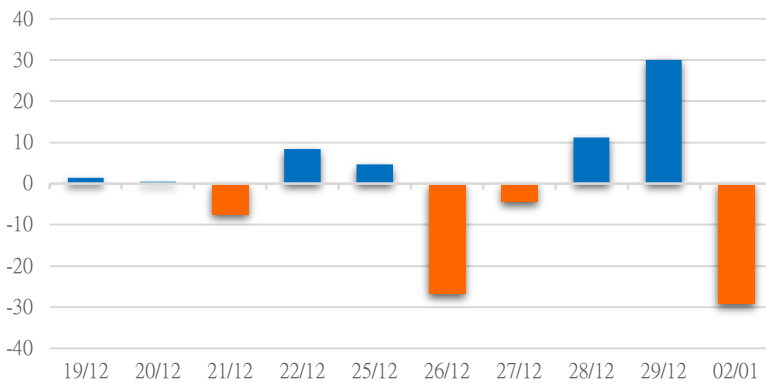
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VCB	91,850	FUESSVFL	-180,025
VHC	24,226	SSI	-89,032
VCI	22,608	VRE	-40,132
VPB	16,697	HCM	-37,321
DGC	15,040	STB	-35,202

HSX 外資買/賣超的前 5 名

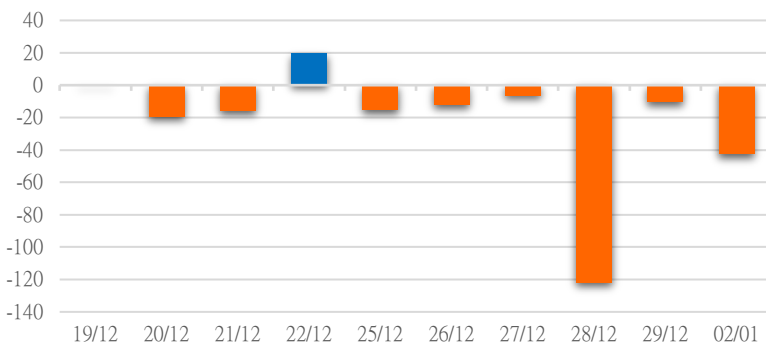
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	6,860	PVS	-17,951
SHS	1,384	BVS	-13,102
PVI	1,102	TNG	-5,524
VGS	683	TIG	-2,200
PPP	211	MBS	-584

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)
BCR	525	ACV	-24,376
VLC	519	VTP	-11,727
TCI	393	QNS	-6,898
VEA	351	ABI	-908
HWS	257	MPC	-532

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)
FUESSVFL	177,502	MBB	24,350
ASM	32,020	NVL	20,670
DXG	19,176	FUEVFNVD	18,869
DBC	13,867	HPG	13,536
KOS	13,192	E1VFN30	13,101

HSX 自營交易最大前名

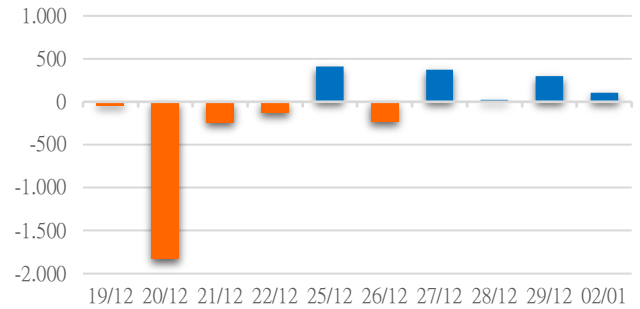
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	14,163		
IDC	3,596		

HNX 自營交易最大前名

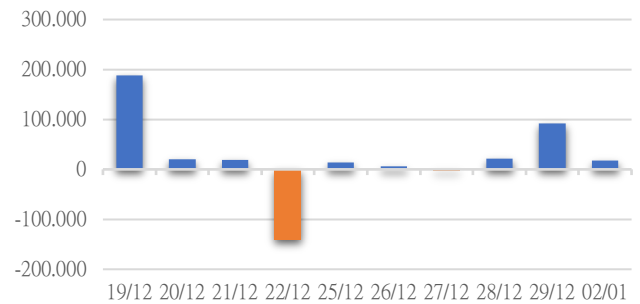
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BSR	5,608.00	GDA	253
QTP	1,040.50		

UPCoM 自營交易最大前名

HSX 自營交易每日買/賣超 (BiVND)



HNX 自營交易每日買/賣超 (BiVND)



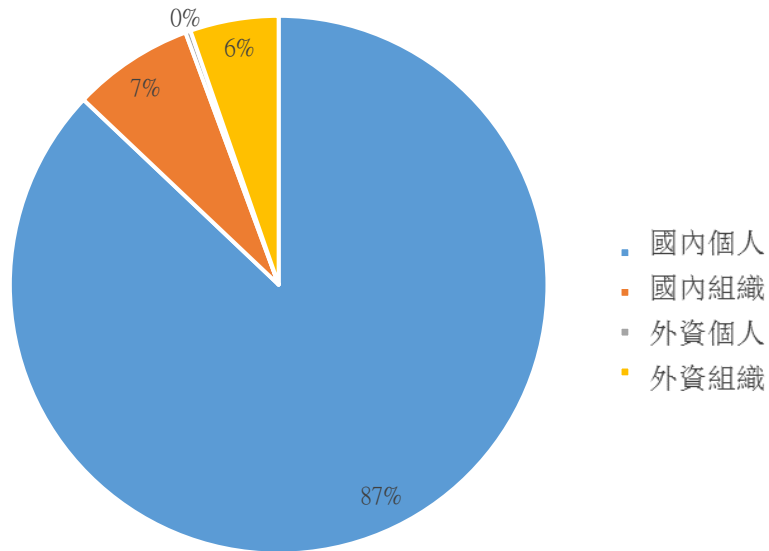
UPCoM 自營交易每日買/賣超 (BiVND)





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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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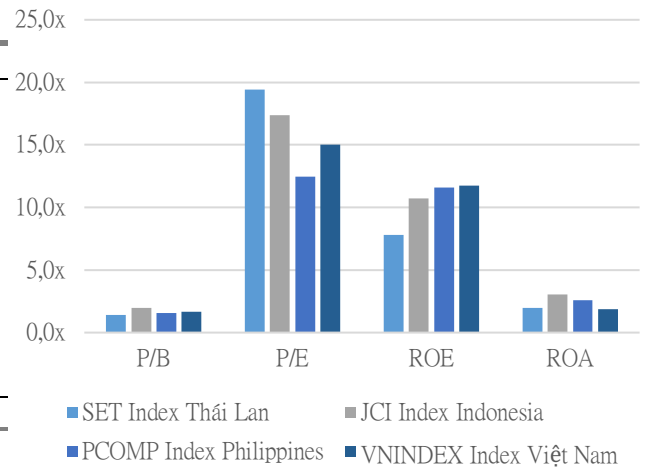
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.5x	1.6x
P/E		19.4x	17.4x	12.5x	15.0x
ROE	%	7.78	10.72	11.60	11.76
ROA	%	1.98	3.07	2.58	1.88
Vốn hóa	Tỷ USD	509.19	756.07	160.59	187.24
GTGD	Triệu USD	1.30	0.47	0.05	0.53
LS cổ tức	%	3.17	3.50	2.58	1.77

源: Bloomberg & YSVN



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



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