

當日市場：市場收於高點

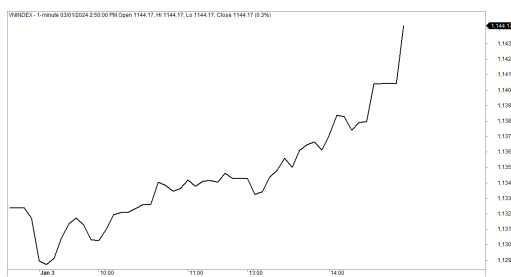
2024/01/04

市場走勢

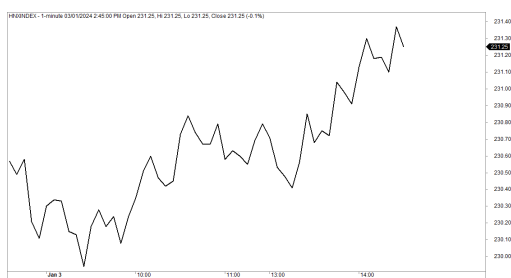
市場指數	VNI	HNI	UPCOM
收盤	1,144.17	231.64	87.80
%日	1.10%	0.72%	0.26%
%週	0.84%	-0.55%	1.55%
%月	2.68%	1.65%	2.81%
%年	12.38%	12.02%	22.23%
成交值(Bil.VND)			
當日	14,684	1,138	564
日均量/週	16,906	1,211	835
日均量/月	16,363	1,700	684
外資進出			
買進	800.98	28.29	4.15
賣出	1,017.57	36.12	15.51
買賣超	-216.59	-7.82	-11.36
市場漲跌家數			
上漲	278	118	139
下跌	63	54	155
持平	74	158	609
市場指標			
P/E	13.80	19.51	17.84
總市值 (兆盾)	4,575	306	1,065
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在盤初小幅調整，但逐漸平衡並再次上漲。興奮的情緒幫助指數大幅上漲，並維持這一趨勢直至尾盤。VN-Index 收漲 1.1%，止於 1144.17 點，則也是盤中的最高水平，HNX-Index 上漲 0.72%，Upcom-Index 上漲 0.26%。3 大市場的交易額均達到 16 兆 3,860 億越南盾。

市場在當日再次處於積極的走勢，因為漲幅占主導地位。整體指數的寬度錄得 278 檔上漲股和 63 檔下跌股。漲幅擴散至許多行業和股票，如銀行、房地產、證券、航空、公共投資和鋼鐵。其中，ACB、GVR、SHB、STB、ITA、LCG、HHV 均上漲超過 2%。同時，HVN、KSB、HNG、ST8、VPG、DGW、POM 收盤漲停。

VN30-Index 收盤上漲 1.17%，而 VN MID-Index (0.94%)、VNSML-Index (1.57%) 顯示現金流在各類股票之間分化。

外資持續賣超超過 2,240 億越南盾，其中 FUESSVFL (2,040 億)、SSI (280 億)、PVS (270 億) 被拋售最多的股票。相反，VCB (630 億)、VHC (400 億)、STB (370 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 可能會上漲至 1,155 點的阻力位。同時，市場有進入積極劇烈波動期的跡象，因此短期上漲趨勢可能會在未來的幾個交易日變得更加明顯，市場可能僅會在盤中出現調整。此外，我們預計現金流在未來的幾個交易日可能會繼續保持高水平。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	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	1144.17	1.10%
VN30	1144.85	1.17%
VN Mid	1738.12	0.94%
VN Small	1391.46	1.57%

河內交易所 (HSX)

	收盤	漲跌%
HNI	231.64	0.72%
HN30	495.41	1.13%
VNX AllSh	1166.13	1.13%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	87.8	0.26%

外資交易	成交值 (Bil.VND)
買進	800.980678
賣出	1017.57229
買超/賣超	-216.591613

外資交易	成交值 (Bil.VND)
買進	28.29
賣出	36.12
買超/賣超	-7.82

外資交易	成交值 (Bil.VND)
買進	4.15
賣出	15.51
買超/賣超	-11.36

上漲排名/ 股碼	漲跌(VND)	漲跌%
VPG	1200	7.00%
POM	350	6.99%
KSB	1850	6.98%
HNG	350	6.97%
HQC	290	6.97%

上漲排名/ 股碼	漲跌(VND)	漲跌%
TKG	900	10.00%
BCC	600	6.52%
OCH	400	5.80%
DTD	1100	4.49%
C69	300	4.35%

上漲排名/ 股碼	漲跌(VND)	漲跌%
VTK	4342000	8.37%
HD6	0	5.59%
VNZ	0	5.18%
VLB	0	4.58%
BDT	18862000	3.92%

下跌排名/ 股碼	漲跌(VND)	漲跌%
FIR	-1250	-6.76%
HSL	-450	-4.69%
SSB	-650	-2.71%
MIG	-350	-1.90%
HDG	-500	-1.85%

下跌排名/ 股碼	漲跌(VND)	漲跌%
HTP	-2100	-9.68%
VHE	-100	-3.23%
GKM	-1000	-2.78%
TTH	-100	-2.70%
VIG	-100	-1.30%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BCR	-925	-9.95%
DSC	-935	-4.68%
KVC	-92	-4.18%
LTG	-463	-1.76%
SBS	-95	-1.28%

*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
SHB	33,358,300	20,310,523
HQC	21,527,700	13,488,134
STB	20,090,700	15,505,495
HHV	18,826,000	6,389,125
HPG	18,575,400	27,673,520

交易量排名/ 股碼	成交值	30 日均
SHS	195,388,763,900	20,570,597
HUT	164,004,021,000	7,365,528
CEO	105,743,256,400	12,212,294
PVS	93,021,413,200	4,026,289
MBS	55,654,615,600	3,978,388

交易量排 名/股碼	成交值	30 日均
BCR	44,356,541,200	0
BSR	64,165,552,900	4,841,842
C4G	31,173,443,500	1,519,525
VGI	63,241,811,000	703,672
KLB	212,965,000	1,025,906

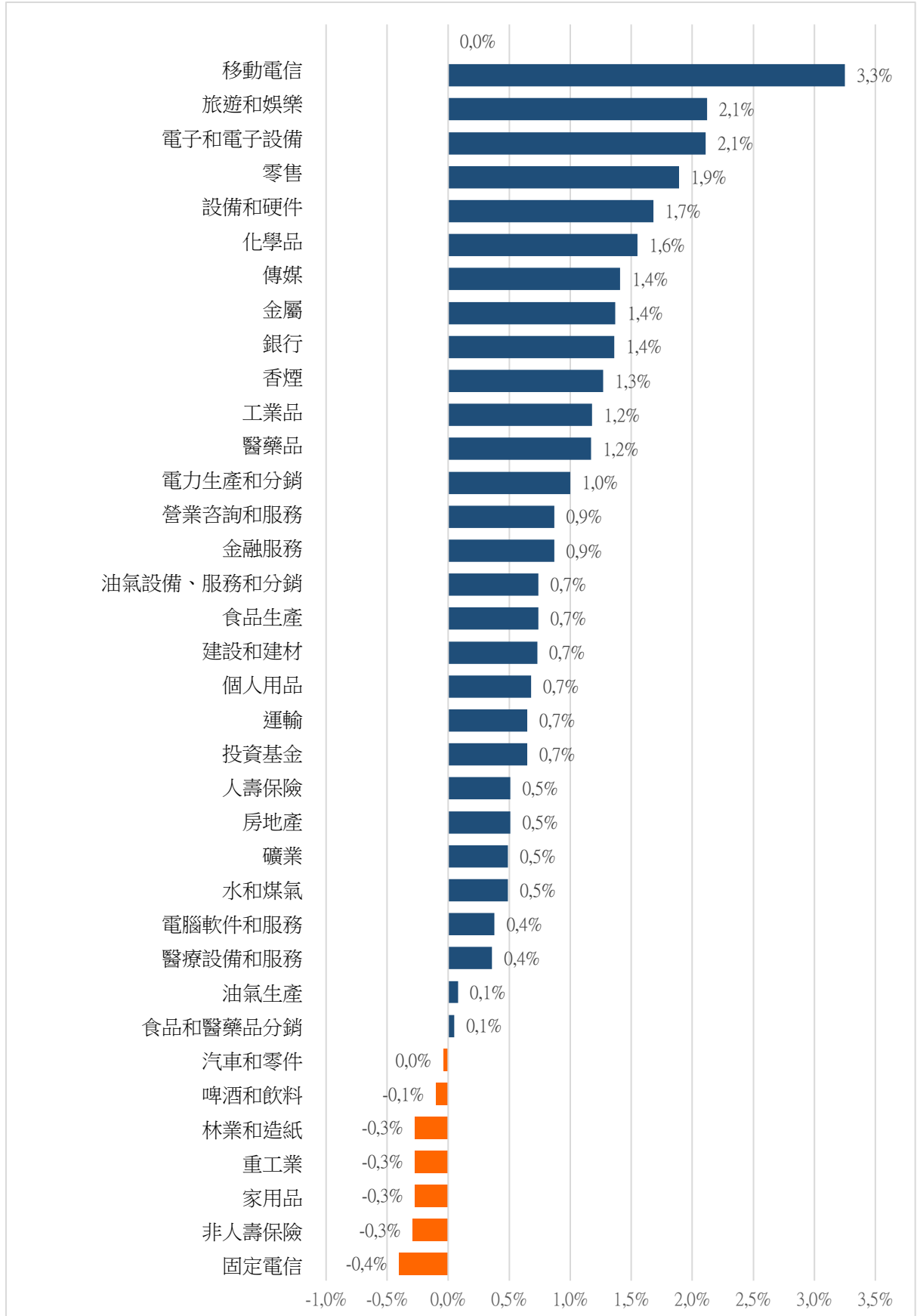
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



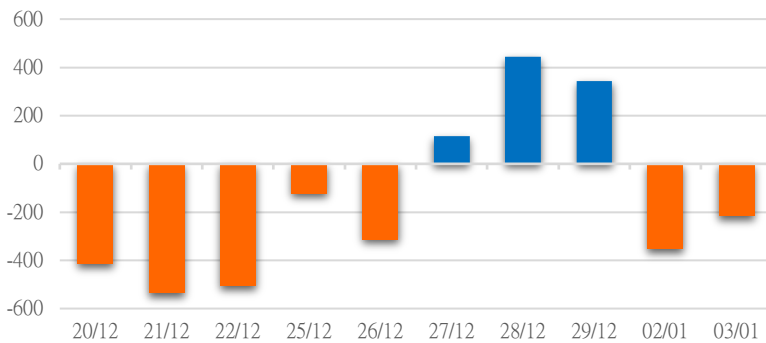
資料源:: FiinPro - YSVN



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外資買進賣統計

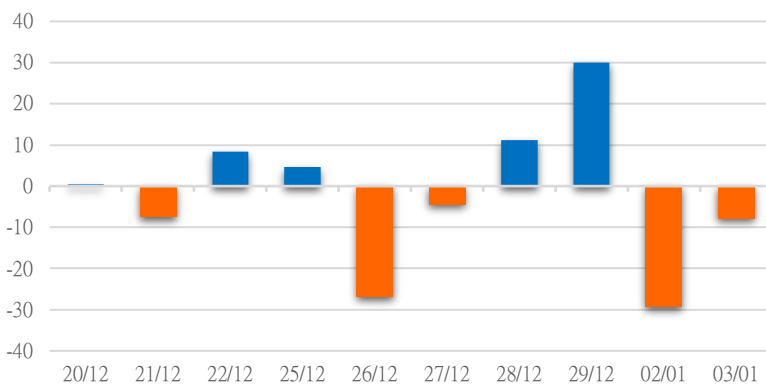
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VCB	63,533	FUESSVFL	-205,229
VHC	40,471	SSI	-39,079
STB	36,953	DXG	-22,908
HDB	23,109	DGC	-22,436
GEX	19,693	SHB	-20,717

HSX 外資買/賣超的前 5 名

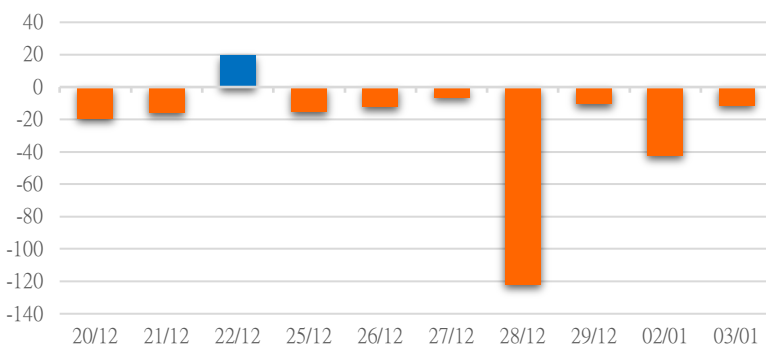
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	22,608	PVS	-26,682
VGS	513	MBS	-1,180
PVI	506	SHS	-934
DDG	280	HUT	-736
IVS	129	CEO	-699

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)
ACV	1,635	QNS	-5,576
MCH	677	VTP	-3,156
LTG	387	VEA	-3,107
VGR	116	ABI	-1,373
VHG	102	TV6	-600

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	205,136	MBB	57,108
KOS	35,820	VPB	53,706
VIB	23,595	FPT	40,696
HAH	18,072	TCB	38,097
PLX	14,409	KDC	37,819

HSX 自營交易最大前名

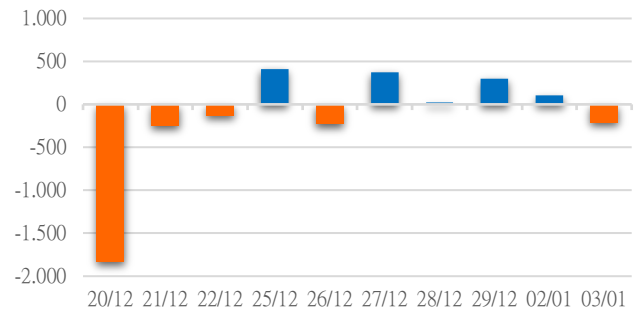
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	842		
L18	467		

HNX 自營交易最大前名

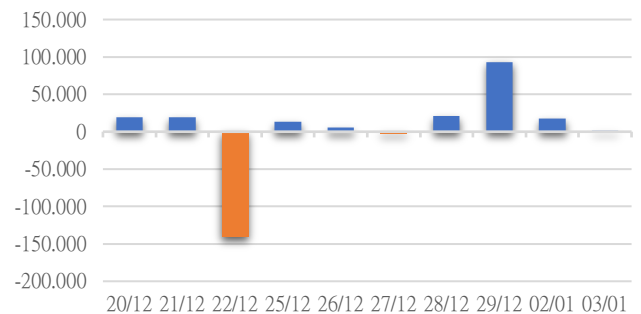
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BCR	48,000.00	GDA	254
BSR	925.00	DSP	65
QTP	591.00	BLF	0

UPCoM 自營交易最大前名

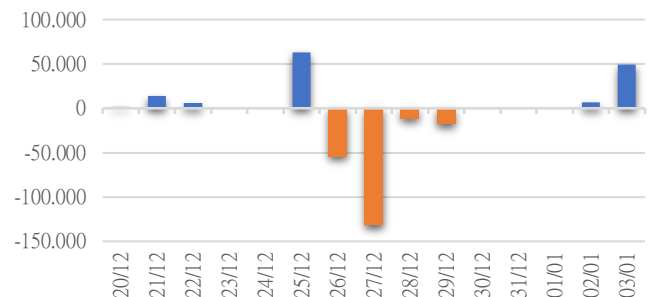
HSX 自營交易每日買/賣超 (BiVND)



HNX 自營交易每日買/賣超 (BiVND)



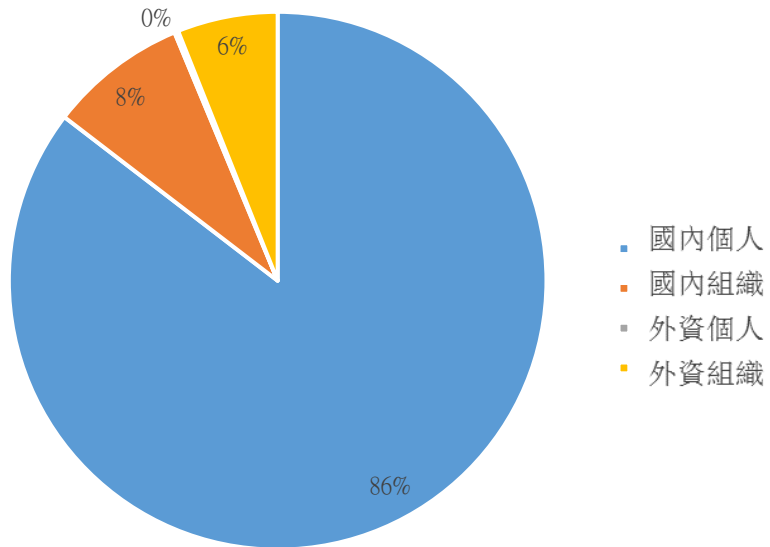
UPCoM 自營交易每日買/賣超 (BiVND)





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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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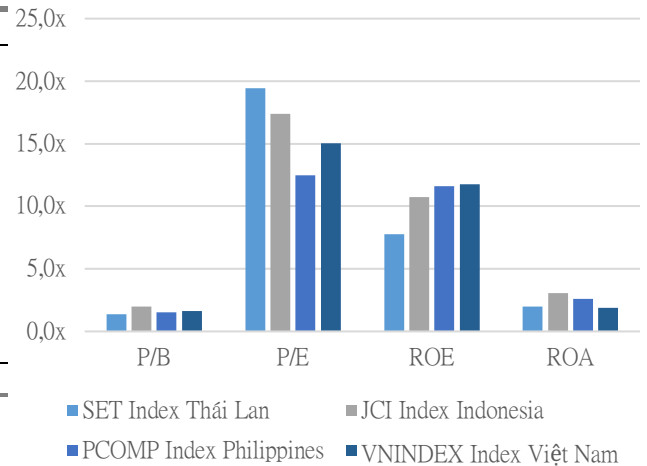
東南亞主要市場走勢比較



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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BUY: We have a positive outlook on the stock based on our expected absolute or relative return over the investment period. Our thesis is based on our analysis of the company's outlook, financial performance, catalysts, valuation and risk profile. We recommend investors add to their position.

HOLD-Outperform: In our view, the stock's fundamentals are relatively more attractive than peers at the current price. Our thesis is based on our analysis of the company's outlook, financial performance, catalysts, valuation and risk profile.

HOLD-Underperform: In our view, the stock's fundamentals are relatively less attractive than peers at the current price. Our thesis is based on our analysis of the company's outlook, financial performance, catalysts, valuation and risk profile.

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