

當日市場：指數處於漲跌交替的走勢

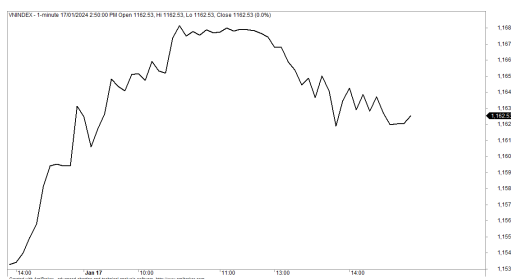
2024/01/18

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,162.53	229.50	86.96
%日	-0.05%	0.00%	-0.07%
%週	0.09%	-0.83%	-0.22%
%月	5.46%	1.09%	2.25%
%年	6.82%	6.67%	19.17%
成交值(Bil.VND)			
當日	16,691	1,445	412
日均量/週	16,483	1,464	608
日均量/月	16,301	1,425	702
外資進出			
買進	1,413.25	33.30	17.69
賣出	1,272.45	16.49	37.68
買賣超	140.80	16.81	-19.99
市場漲跌家數			
上漲	162	89	178
下跌	152	72	134
持平	101	169	591
市場指標			
P/E	14.05	19.08	17.72
總市值 (兆盾)	4,676	304	1,058
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場持續波動，並處於漲跌交替的走勢，指數在午盤再次反轉下跌。VN-Index 收盤下跌 0.05%，止於 1162.53 點，HNX-Index 收盤持平，Upcom-Index 同步小幅下跌。3 大市場的交易額均達到 18 兆 5,480 億越南盾。

銀行股強勁分化，導致市場沒有任何股票能夠強勁引領。VCB (1%)、GVR (1.19%)、MWG (1.35%) 是漲幅最顯著的 3 檔大型股。相反，MSN、SHB、VHM、TPB 等藍籌股領跌，跌幅約 1%。

在行業板塊方面，證券（VIX、BSI、SSI、VND）和物流（PVT、VSC、VOS）等錄得積極的走勢。

外資在連續第三個交易日買超超過 1,380 億越南盾，其中 MWG（310 億）、VPB（230 億）、HUT（140 億）在買超方面領先。相反，VCI（350 億）、SSI（250 億）、MSN（160 億）被拋售最多的股票。

市場短期觀點

我們認為市場在下個交易日可能會繼續上漲，VN-Index 在下個交易日仍可能在當前水平附近在窄幅波動。同時，市場仍處於短期調整階段，因此 VN-Index 的價格走勢圖在下個交易日可能無法完全突破 1,169 點的阻力位，但短期風險出現上漲至大型股的跡象，顯示大型股在未來幾個交易日仍可能會出現調整。此外，情緒指標小幅上漲，但仍處於悲觀區域，顯示投資者在期貨到期日前仍保持謹慎態度。

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持有高比例的股票，但在此期間不宜回購。

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

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1162.53	-0.05%
VN30	1166.61	-0.31%
VN Mid	1739.54	0.24%
VN Small	1379.35	0.45%

河內交易所 (HSX)

	收盤	漲跌%
HNI	229.5	0.00%
HN30	485.67	0.10%
VNX AllSh	1180.02	-0.10%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	86.96	-0.07%

外資交易	成交值 (Bil.VND)
買進	1413.25481
賣出	1272.45247
買超/賣超	140.80234

外資交易	成交值 (Bil.VND)
買進	33.30
賣出	16.49
買超/賣超	16.81

外資交易	成交值 (Bil.VND)
買進	17.69
賣出	37.68
買超/賣超	-19.99

上漲排名/股碼	漲跌(VND)	漲跌%
BSI	3300	6.98%
VSC	1325	6.91%
YEG	700	6.76%
TNC	3700	6.64%
ST8	1100	5.51%

上漲排名/股碼	漲跌(VND)	漲跌%
TKG	600	4.55%
CMS	800	4.44%
SRA	100	2.86%
VIG	200	2.63%
DL1	100	2.33%

上漲排名/股碼	漲跌(VND)	漲跌%
KGM	12460400	11.31%
TIS	90126880	9.85%
HSV	7869326	3.71%
SBS	145890516	3.31%
AAS	227422350	3.17%

下跌排名/股碼	漲跌(VND)	漲跌%
HSL	-420	-4.99%
FIR	-500	-3.77%
NVL	-450	-2.70%
POM	-140	-2.60%
RDP	-230	-2.49%

下跌排名/股碼	漲跌(VND)	漲跌%
NVB	-400	-3.39%
MST	-200	-3.17%
DVM	-300	-2.59%
NRC	-100	-2.08%
API	-100	-1.82%

下跌排名/股碼	漲跌(VND)	漲跌%
BCR	-183	-2.44%
CCA	-279	-2.10%
BOT	-54	-1.69%
CEN	-50	-0.88%
AFX	-76	-0.87%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	Bil.VND
VCB	503,018,214
BID	267,350,444
VHM	185,713,773
GAS	173,633,532
CTG	168,617,741

市值排名/股碼	Bil.VND
HUT	17,760,988
PVS	17,732,549
IDC	16,763,996
SHS	14,962,084
THD	13,667,499

市值排名/股碼	Bil.VND
ACV	139,050,532
VGI	80,085,716
MCH	64,689,101
BSR	56,711,238
VEA	47,875,335

交易量排名/股碼	成交值	30 日均
SHB	53,998,290	32,214,053
VIX	52,845,200	21,932,790
SSI	26,299,902	19,277,637
NVL	25,533,100	14,228,263
EIB	24,904,600	22,708,294

交易量排名/股碼	成交值	30 日均
SHS	477,319,824,800	17,231,698
MBS	202,453,378,500	3,693,939
HUT	105,739,279,300	6,683,843
CEO	115,258,852,900	8,929,977
MBG	25,406,585,400	1,433,176

交易量排名/股碼	成交值	30 日均
BSR	54,155,684,600	4,067,526
BCR	15,237,310,500	3,527,321
ABB	15,081,516,000	1,841,569
SBS	13,215,957,800	1,182,088
AAS	10,677,212,200	1,270,419

資料源: Bloomberg & Yuanta Research

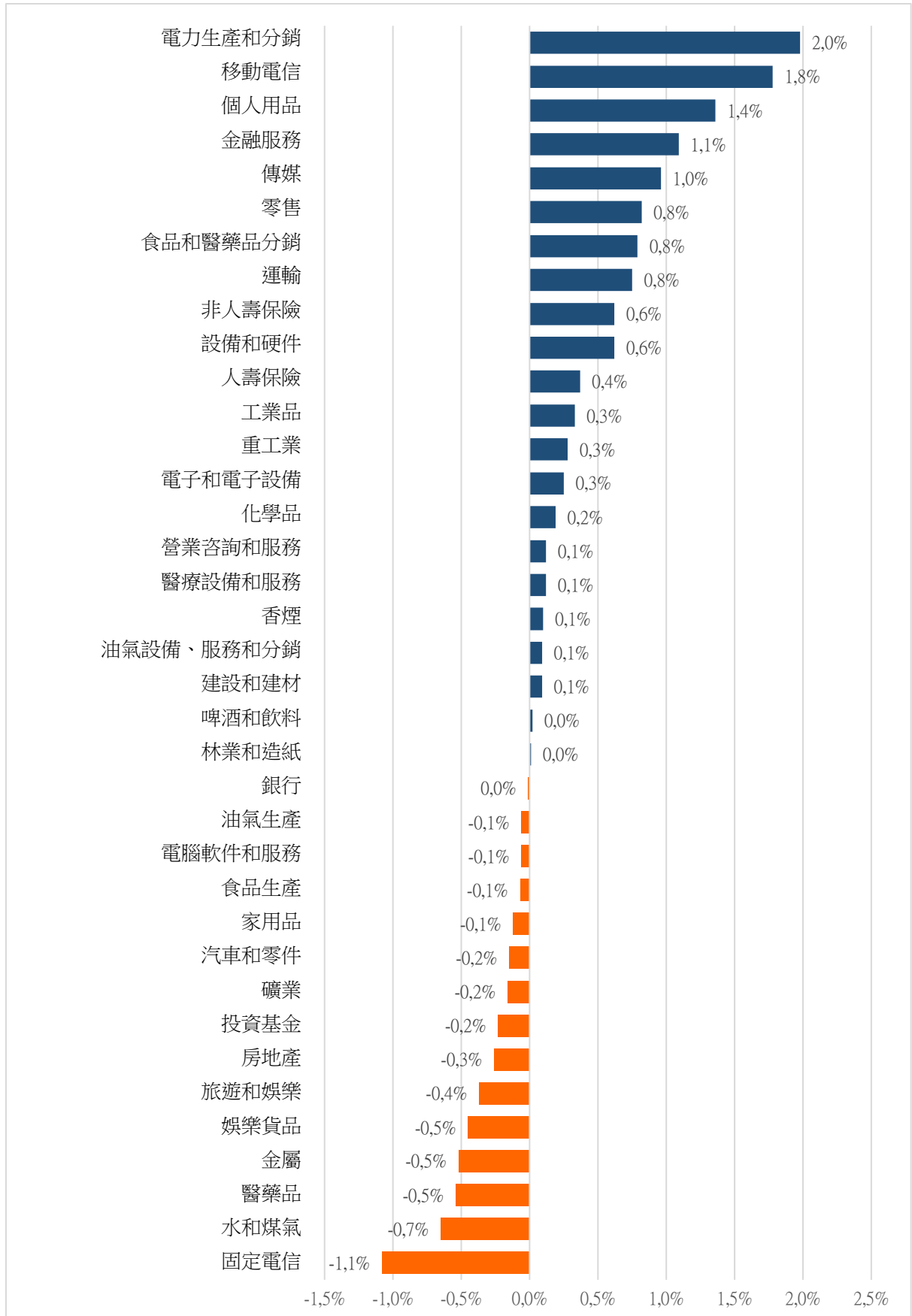
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



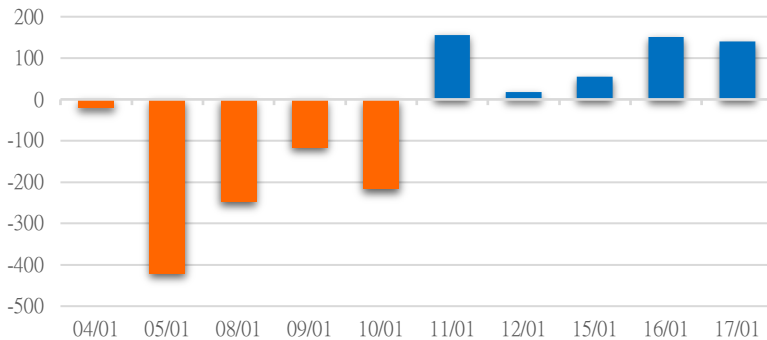
資料源:: FinPro - YSVN



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外資買進賣統計

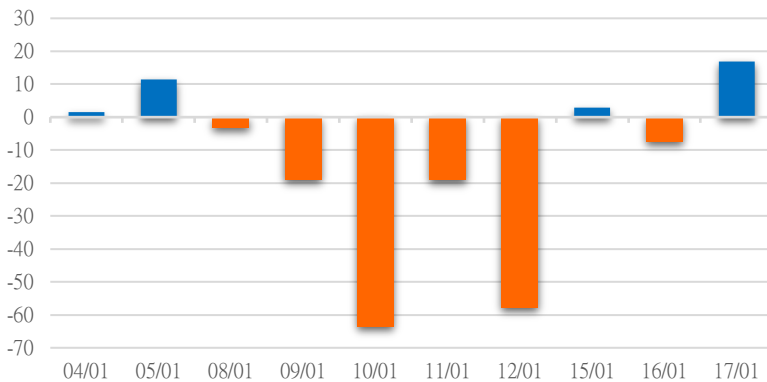
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MWG	158,948	FUEVFNVD	-100,607
HPG	91,302	VRE	-75,420
VCB	73,428	LPB	-43,560
STB	48,166	DGC	-43,050
VPB	32,965	VNM	-39,151

HSX 外資買/賣超的前 5 名

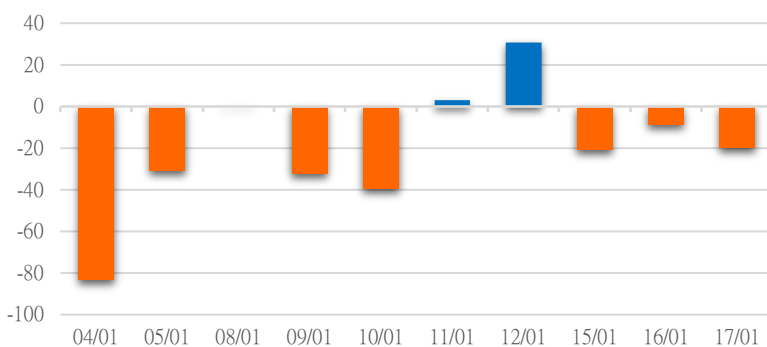
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SHS	12,783	VCS	-2,713
DL1	6,654	NBC	-576
MBS	2,366	EID	-573
TNG	990	SED	-525
MBG	277	IDC	-250

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)
GDA	7,959	ACV	-18,171
LTG	716	VTP	-4,908
ABI	673	BSR	-4,340
HPD	357	BCR	-857
AAS	175	NAB	-686

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	73,488	AAA	263,577
VIX	49,782	FPT	37,493
PNJ	27,769	VPB	31,853
PVD	24,059	ACB	29,998
HAH	4,530	MWG	28,166

HSX 自營交易最大前名

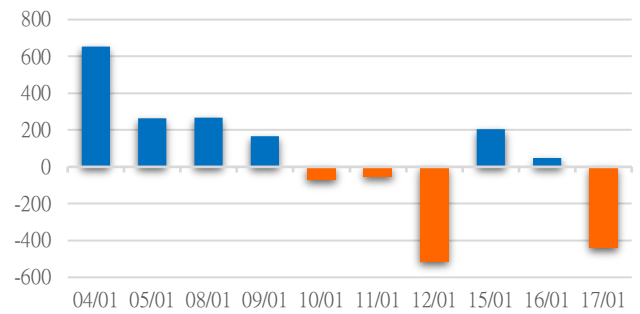
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	583	CEO	2
PVS	182		
L18	92		

HNX 自營交易最大前名

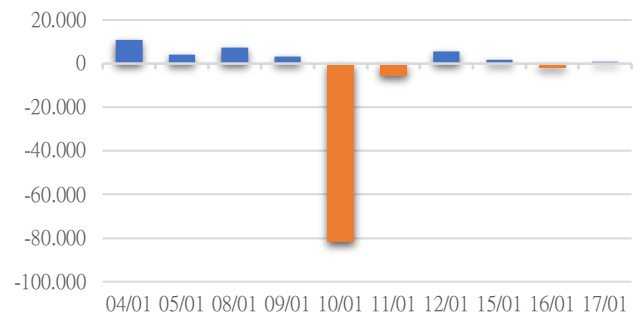
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BSR	910.00	ACV	20,934
		GDA	259
		VLB	146
		QTP	9

UPCoM 自營交易最大前名

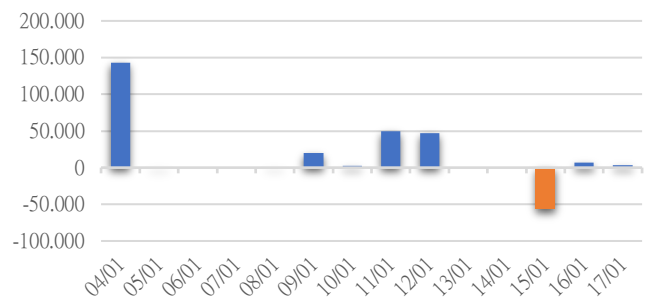
HSX 自營交易每日買/賣超 (BiVND)



HNX 自營交易每日買/賣超 (BiVND)



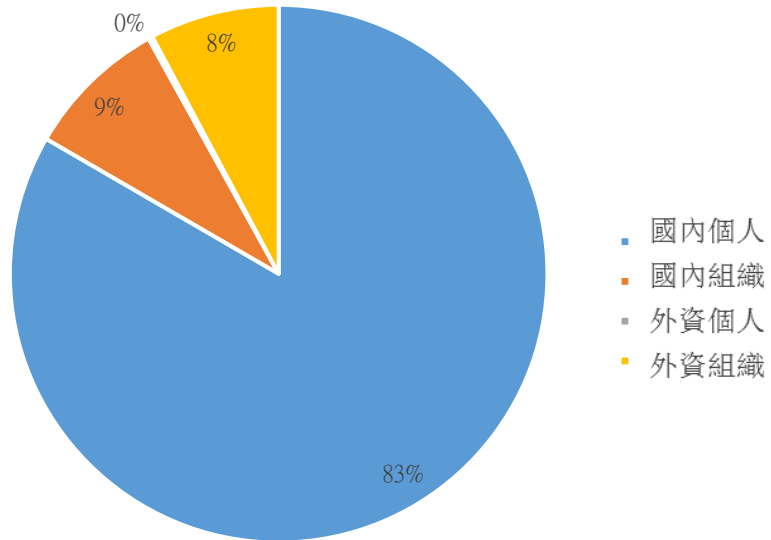
UPCoM 自營交易每日買/賣超 (BiVND)





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越南證券市場投資人類別統計

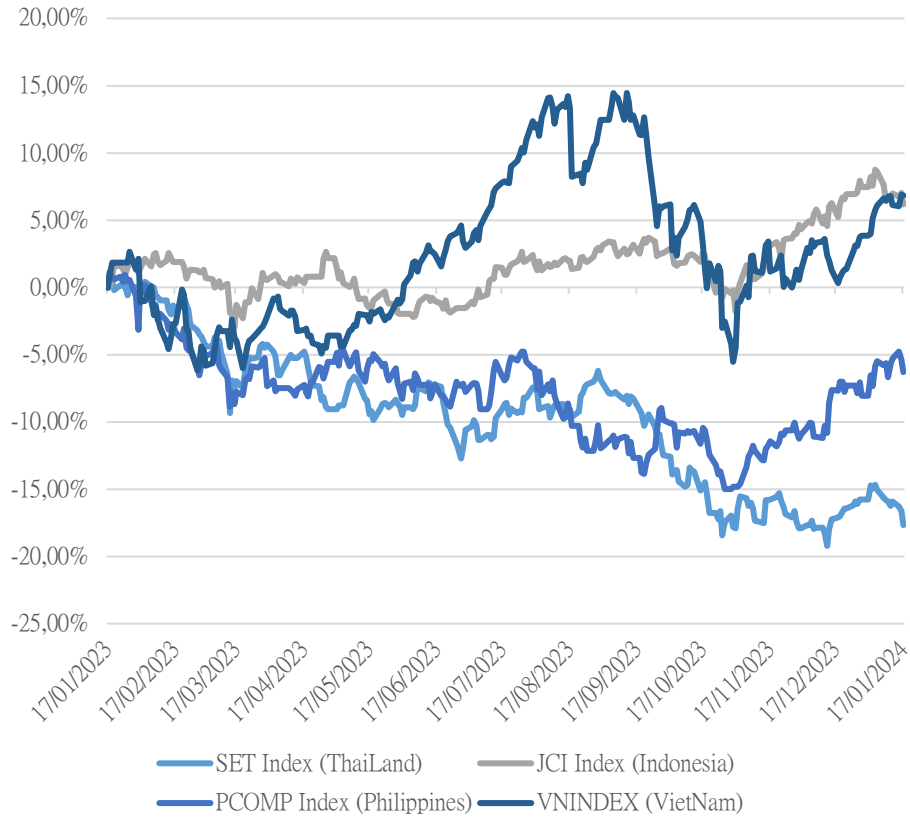


資料源: FiinPro - YSVN



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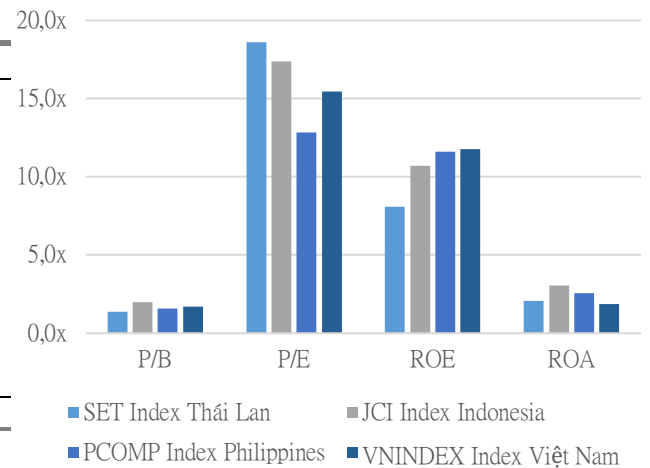
東南亞主要市場走勢比較



東南亞主要市場數據

	Thailand	Indonesia	Philippines	Vietnam
P/B	1.4x	2.0x	1.6x	1.7x
P/E	18.7x	17.3x	12.9x	15.4x
ROE	% 8.08	10.71	11.60	11.76
ROA	% 2.07	3.07	2.58	1.88
Vốn hóa	Tỷ USD 492.10	726.78	166.39	190.15
GTGD	Triệu USD 0.78	0.57	0.06	0.47
LS cổ tức	% 3.20	3.38	2.55	1.77

源: Bloomberg & YSVN





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