

當日市場：市場處於劇烈波動的時期

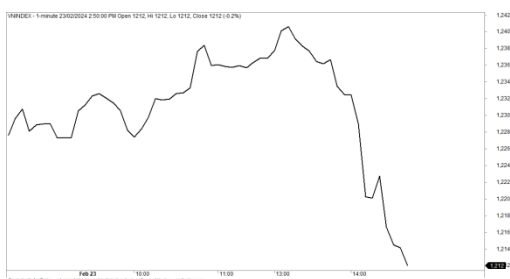
2024/02/26

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,212.00	231.08	90.16
%日	-1.25%	-1.25%	-0.45%
%週	0.19%	-0.84%	0.11%
%月	2.93%	0.79%	3.10%
%年	15.03%	10.40%	16.49%
成交值(Bil.VND)			
當日	31,899	2,275	950
日均量/週	23,623	1,754	1,177
日均量/月	18,390	1,410	889
外資進出			
買進	1,850.08	86.28	24.12
賣出	2,623.21	108.09	24.74
買賣超	-773.13	-21.81	-0.62
市場漲跌家數			
上漲	72	59	202
下跌	277	120	188
持平	68	146	513
市場指標			
P/E	14.04	19.26	16.09
總市值 (兆盾)	4,880	309	1,149
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

受近兩個交易日銀行間利率上調的消息影響，市場在午盤強勁調整。VN-Index 收盤下跌 1.25%，止於 1,212 點，則也是過去 20 日來的最大跌幅，HNX-Index 下跌 1.25%，Upcom-Index 下跌 0.45%。3 大市場的交易額大幅增加至 35 兆 1,240 億越南盾。

拋售壓力在當日強勁擴散至整個市場，VN30-Index 下跌 1.36%，其中有 27 檔下跌股和僅有 2 檔上漲股。BID (4.52%)、VJC (0.19%) 是兩檔逆市的藍籌股。相反，MSN、PLX、POW、SHB、TPB、MWG、VHM、VIC、VPB、VRE 等從 2% 下跌。

中小型股也被強勁拋售，如 PC1、HAG、DBC、LCG、LPB、KHG、PVD 等多檔股票均從 3% 下跌。

外資在 3 大市場在當日強勁賣超近 7,960 億越南盾，其中 HPG (1,500 億)、VPB (1,170 億)、MSN (1,100 億) 被拋售最多的股票。相反，DGC (540 億)、ASM (490 億)、IDC (340 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繼續調整，VN-Index 可能會下跌至 1,200 - 1,210 點的支撐位。同時，短期風險有上漲的跡象，中小型股的短期走勢轉為下跌趨勢，因此市場可能會快速進入短期調整階段，各類股票之間可能會出現分化。此外，短期情緒指標大幅下跌，顯示投資者對當前市場的走勢更加謹慎。

大盤的短期趨勢調整至中性。因此，我們建議短期投資者可以重組投資組合，將股票比例減少至均衡水平，並在此期間停止買進。

從周線圖來看，VN-Index 比前一周收盤上漲 0.2%，成交量大幅增加。同時，我們認為市場可能會在下一周出現調整，但這被認為是前期連續上漲後的技術調整階段。另外，大盤的中期走勢仍維持上漲。因此，我們建議中期投資者可以繼續在投資組合中持有高比例的股票，並可以利用調整期的機會以增加股票比例。

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	中性	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	下跌	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	1212	-1.25%
VN30	1223.09	-1.36%
VN Mid	1777.62	-2.05%
VN Small	1416.93	-1.76%

外資交易	成交值 (BiL.VND)
買進	1850.076997
賣出	2623.207941
買超/賣超	-
	773.1309441

上漲排名/ 股碼	漲跌(VND)	漲跌%
C32	950	5.28%
BMP	5500	5.00%
PHC	130	1.83%
THG	600	1.48%
TCD	80	0.97%

下跌排名/ 股碼	漲跌(VND)	漲跌%
PC1	-1550	-5.30%
LCG	-650	-4.81%
DPG	-1900	-4.53%
CTD	-3100	-4.50%
CII	-850	-4.43%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VGC	24,838,590
VCG	13,254,745
LGC	11,378,431
CTR	11,358,518
PC1	9,096,620

交易量排名/ 股碼	成交值	30 日均
CII	16,444,000	10,676,633
PC1	14,480,200	11,829,738
VCG	10,808,100	6,719,896
HHV	10,103,700	5,125,649
LCG	9,776,400	5,906,175

河內交易所 (HSX)

	收盤	漲跌%
HNI	231.08	-1.25%
HN30	488.28	-2.01%
VNX AllSh	1226.44	-1.58%

外資交易	成交值 (BiL.VND)
買進	86.28
賣出	108.09
買超/賣超	-21.81

上漲排名/ 股碼	漲跌(VND)	漲跌%
SCI	1200	9.52%
S99	800	8.00%
MCO	1100	6.08%
CMS	100	0.62%
SCG	400	0.61%

下跌排名/ 股碼	漲跌(VND)	漲跌%
MBG	-300	-5.88%
DVG	-200	-5.71%
MST	-400	-5.56%
VC7	-700	-5.30%
C69	-400	-5.00%

市值排名/ 股碼	BiL.VND
HUT	16,957,727
VCS	10,016,000
NTP	5,727,230
SCG	5,567,500
DNP	2,473,143

交易量排名/ 股碼	成交值	30 日均
HUT	117,744,327,700	3,938,298
S99	29,796,048,300	285,591
MST	13,303,815,000	1,281,130
MBG	7,480,405,100	1,485,883
LIG	5,678,199,200	709,329

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	90.16	-0.45%

外資交易	成交值 (BiL.VND)
買進	24.12
賣出	24.74
買超/賣超	-0.62

上漲排名/ 股碼	漲跌(VND)	漲跌%
PVX	0	4.14%
BOT	30103968	2.72%
C4G	0	-0.79%
VLB	0	-1.21%
DGT	38613200	-1.89%

下跌排名/ 股碼	漲跌(VND)	漲跌%
G36	-268	-3.15%
BCR	-189	-3.05%
DGT	-108	-1.89%
VLB	-440	-1.21%
C4G	-93	-0.79%

市值排名/ 股碼	BiL.VND
SNZ	12,362,485
SJG	6,248,566
CC1	5,583,871
C4G	4,170,057
GAB	2,927,143

交易量排名/ 股碼	成交值	30 日均
BCR	22,041,122,700	2,385,422
PVX	5,275,771,000	246,650
BOT	6,495,509,400	614,297
C4G	17,540,897,600	877,580
G36	6,707,890,000	266,011

資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



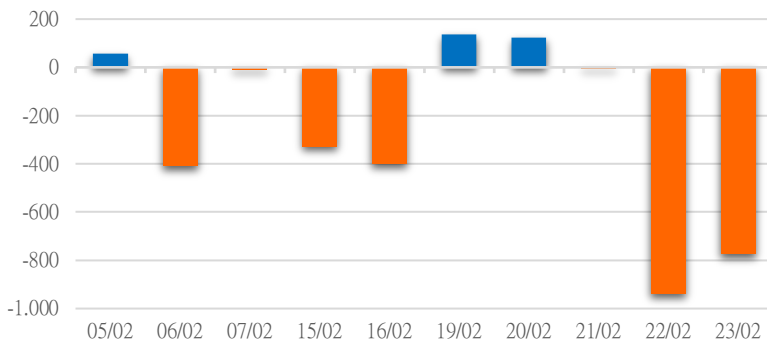
資料源: FiinPro - YSVN



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外資買進賣統計

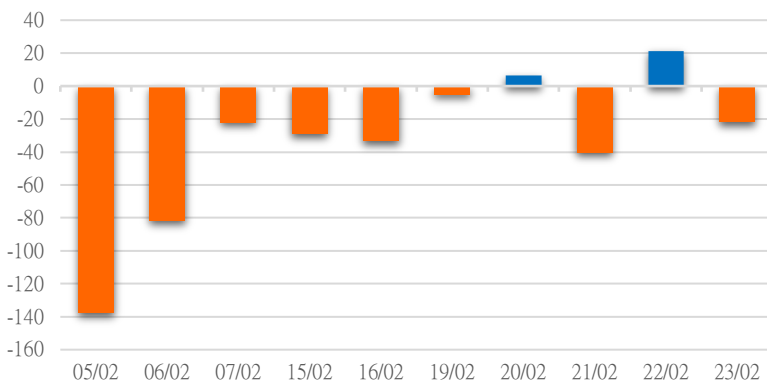
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
HHV	6,200	VCG	-44,580
BMP	3,838	LCG	-13,559
VGC	2,092	CII	-11,261
CTR	1,109	PC1	-9,831
DC4	210	CTD	-9,226

HSX 外資買/賣超的前 5 名

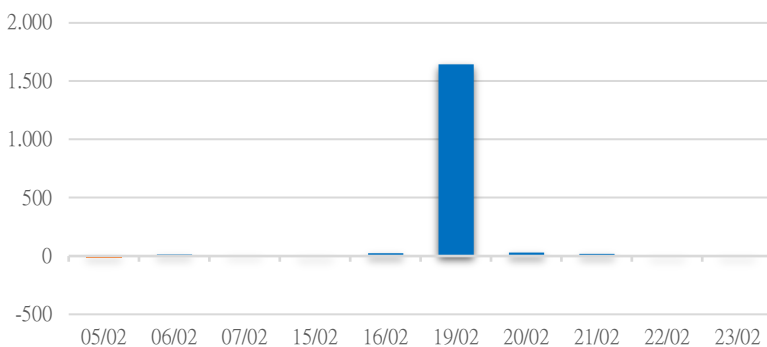
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MST	709	HUT	-5,811
HCC	138	VC7	-355
C69	77	L14	-327
HOM	7	VCS	-219
PDB	4	LHC	-201

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)
CMD	18	BCR	-286
HPP	6	BOT	-51
BDT	5	TED	-20
UDC	3	PXT	-1
TTZ	0	DC1	0

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)
EVF	99,484	PC1	97,804
FUEVFNVD	75,398	EIB	92,823
E1VFN30	72,986	FPT	40,855
HCM	41,805	NVL	40,336
BID	41,656	ACB	29,537

HSX 自營交易最大前名

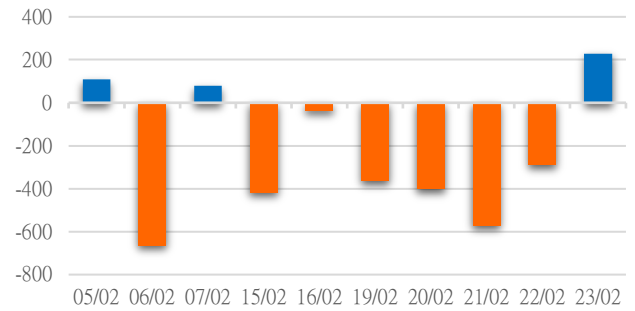
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MBS	19,709	HJS	8,556
PVS	4,377		
IDC	842		
LAS	184		

HNX 自營交易最大前名

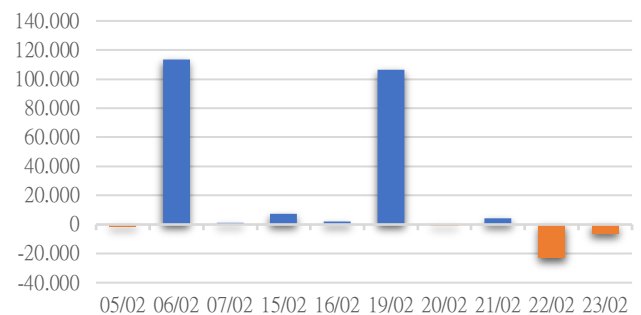
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VGT	1,180.00	QTP	2,389
		QNS	954
		GDA	246

UPCoM 自營交易最大前名

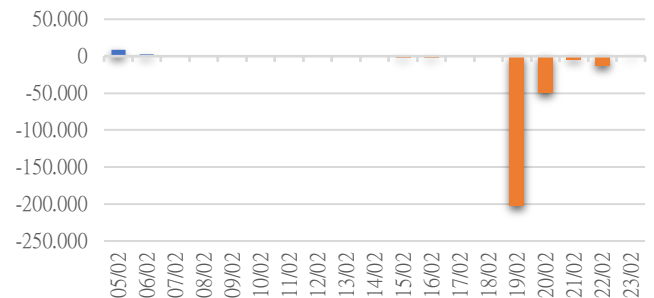
HSX 自營交易每日買/賣超 (BilVND)



HNX 自營交易每日買/賣超 (BilVND)



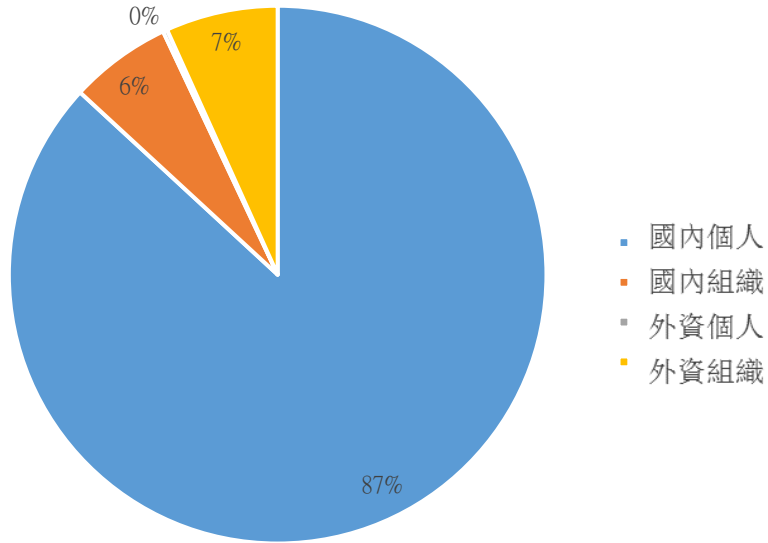
UPCoM 自營交易每日買/賣超 (BilVND)





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越南證券市場投資人類別統計

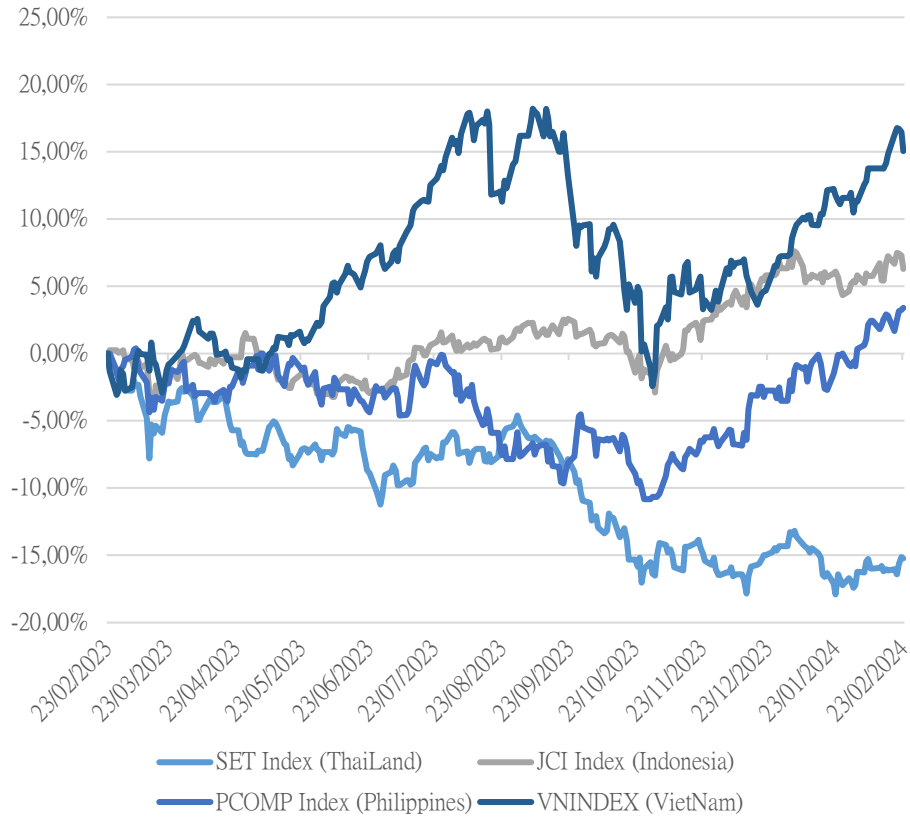


資料源: FiinPro - YSVN



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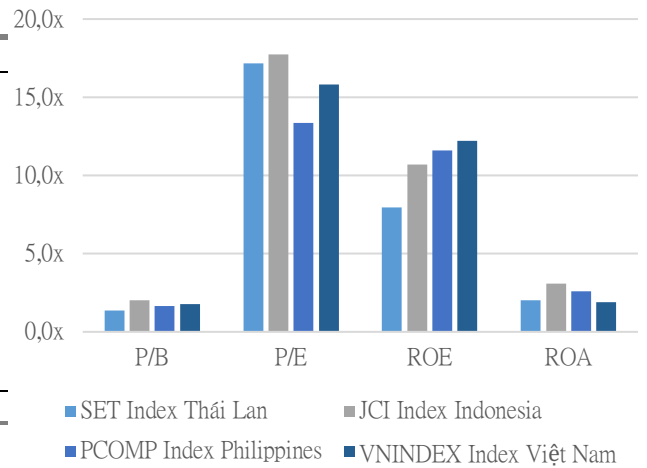
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.3x	2.0x	1.6x	1.8x
P/E		16.9x	17.8x	13.3x	15.9x
ROE	%	7.94	10.71	11.60	12.27
ROA	%	2.03	3.07	2.58	1.89
Vốn hóa	Tỷ USD	474.90	744.60	168.76	203.15
GTGD	Triệu USD	0.98	0.61	0.07	0.77
LS cổ tức	%	3.15	3.36	2.45	1.62

源：Bloomberg & YSVN



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



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