

當日市場：金融和房地產股引領市場

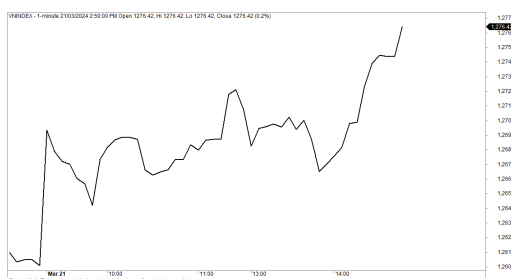
2024/03/22

市場走勢

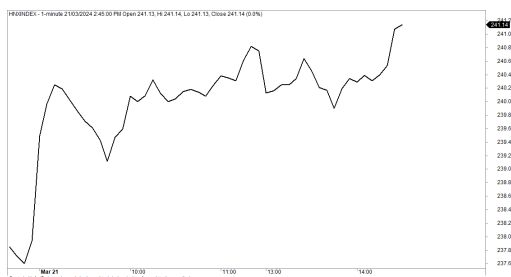
市場指數	VNI	HNI	UPCOM
收盤	1,276.42	241.14	90.82
%日	1.30%	1.31%	0.31%
%週	0.96%	0.61%	-0.87%
%月	3.77%	3.12%	0.23%
%年	23.63%	18.72%	20.02%
<b>成交值(Bil.VND)</b>			
當日	29,572	3,598	664
日均量/週	28,937	2,631	668
日均量/月	25,932	2,294	738
<b>外資進出</b>			
買進	2,038.97	162.76	27.11
賣出	2,397.70	71.45	37.25
買賣超	-358.73	91.32	-10.14
<b>市場漲跌家數</b>			
上漲	255	118	217
下跌	87	55	124
持平	77	152	562
<b>市場指標</b>			
P/E	14.72	19.92	17.55
總市值 (兆盾)	5,172	323	1,173
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

美聯儲會議結束後，美國股市也顯示出積極的反應，市場在連續第二個交易日延續大幅上漲趨勢。VN-Index 收漲 1.3%，止於 1276.42 點，HNX-Index 上漲 1.31%，Upcom-Index 上漲 0.31%。3 大市場的交易額均達到 33 兆 8,330 億越南盾。

金融股持續處於積極劇烈波動的時期，如 TCB、VND、HDB、MBB、VCB 上漲 2% 以上。PLX、GVR、FPT、MWG、VRE 等其他藍籌股同步上漲 1% 以上。指數的寬度中有 25 檔上漲股和 5 檔參考股。

中型房地產股上漲，如 PDR 漲停，而 NVL (3.32%)、DXG (4%)、KHG (4.75%)、DXS (4.23%)、LDG (3.2%)、DIG (4.28%) 也錄得相當良好的漲幅。此外，ASM、CNG、CTR、AGM、CCL 均漲停。

外資在連續第 8 個交易日在 3 大市場賣超 2,770 億越南盾，其中 VNM (2,020 億)、MSN (1,750 億)、VHM (1,650 億) 被拋售最多的股票。相反，VND (1,870 億)、KBC (1,470 億)、SSI (1,150 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出現調整階段，但上漲趨勢仍可維持。同時，市場出現進入積極劇烈波動時期的跡象，因此 VN-Index 可能會快速在接下來的幾個交易日中完全突破 1,268 - 1,270 點的阻力位。此外，短期情緒指標持續大幅上漲，顯示投資者對市場走勢逐漸轉為更加樂觀，儘管指數在近幾個交易日有所上漲，但短期風險仍然較低，新的買進機會仍然存在。

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投資組合中較高比例的股票，並在調整期時買進新股。

請在 <https://ysradar.yuanta.com.vn/> 查看有關股票的信號。

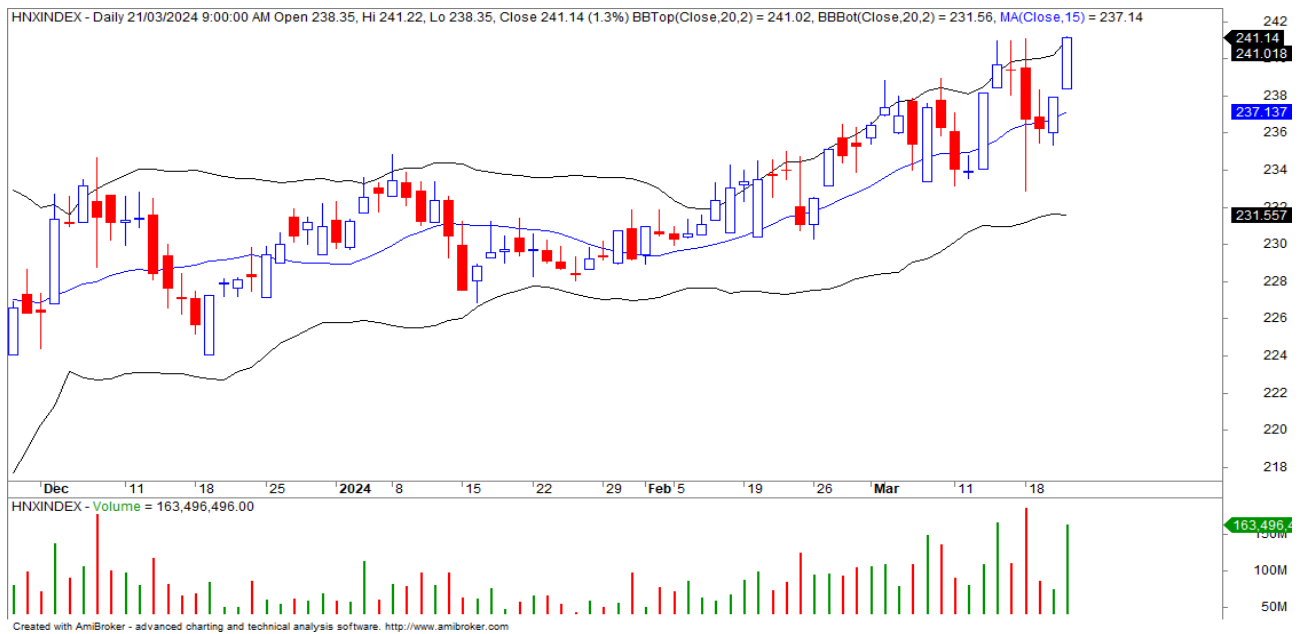


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### 技術分析圖



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	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	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	1276.42	1.30%
VN30	1281.57	1.79%
VN Mid	1921	1.12%
VN Small	1511.94	1.03%

河內交易所 (HSX)

	收盤	漲跌%
HNI	241.14	1.31%
HN30	529.77	2.15%
VNX AllSh	1298.02	1.54%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	90.82	0.31%

外資交易	成交值 (BiL.VND)
買進	2038.96939
賣出	2397.69854
買超/賣超	-358.729144

外資交易	成交值 (BiL.VND)
買進	162.76
賣出	71.45
買超/賣超	91.32

外資交易	成交值 (BiL.VND)
買進	27.11
賣出	37.25
買超/賣超	-10.14

上漲排名/ 股碼	漲跌(VND)	漲跌%
AGM	1250	19.90%
ASM	800	6.99%
CCL	610	6.98%
CNG	2300	6.97%
CTR	8300	6.97%

上漲排名/ 股碼	漲跌(VND)	漲跌%
HMR	1300	10.00%
VIG	400	4.71%
C69	300	4.05%
NRC	200	4.00%
SHS	700	3.65%

上漲排名/ 股碼	漲跌(VND)	漲跌%
MCG	28077360	10.89%
ILA	0	5.31%
DDV	70897651	5.25%
VGI	0	3.42%
PXL	40441603	3.35%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ASP	-150	-3.11%
HUB	-500	-2.51%
SAV	-350	-2.15%
NT2	-450	-1.82%
TV2	-800	-1.77%

下跌排名/ 股碼	漲跌(VND)	漲跌%
MCO	-1200	-4.23%
HVT	-2000	-2.99%
AMV	-100	-2.56%
LIG	-100	-2.38%
TTH	-100	-2.04%

下跌排名/ 股碼	漲跌(VND)	漲跌%
DSC	-540	-2.18%
HSV	-159	-1.92%
VNZ	-10020	-1.88%
ACE	-311	-0.86%
MCH	-305	-0.23%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VCB	532,081,488
BID	302,123,103
CTG	187,412,712
VHM	186,802,365
GAS	186,035,928

市值排名/ 股碼	BiL.VND
IDC	19,502,996
PVS	18,353,906
HUT	17,314,732
SHS	16,181,819
THD	13,474,999

市值排名/ 股碼	BiL.VND
ACV	187,161,137
VGI	111,440,016
MCH	93,989,850
BSR	59,417,975
VEA	48,157,041

交易量排名/ 股碼	成交值	30 日均
VND	62,580,300	33,370,135
SHB	56,736,900	32,804,718
DIG	44,811,900	28,188,059
NVL	42,529,800	24,305,015
PDR	40,197,300	12,576,197

交易量排名/ 股碼	成交值	30 日均
SHS	58,075,662	29,448,084
CEO	32,623,065	13,075,568
PVS	14,453,784	7,282,331
HUT	11,047,071	5,358,582
MBS	5,638,431	5,276,477

交易量排 名/股碼	成交值	30 日均
THN	6,883,400	4
BSR	4,757,134	6,620,393
DDV	4,043,033	2,108,545
SBS	2,579,970	3,133,082
BCR	2,434,274	1,509,144

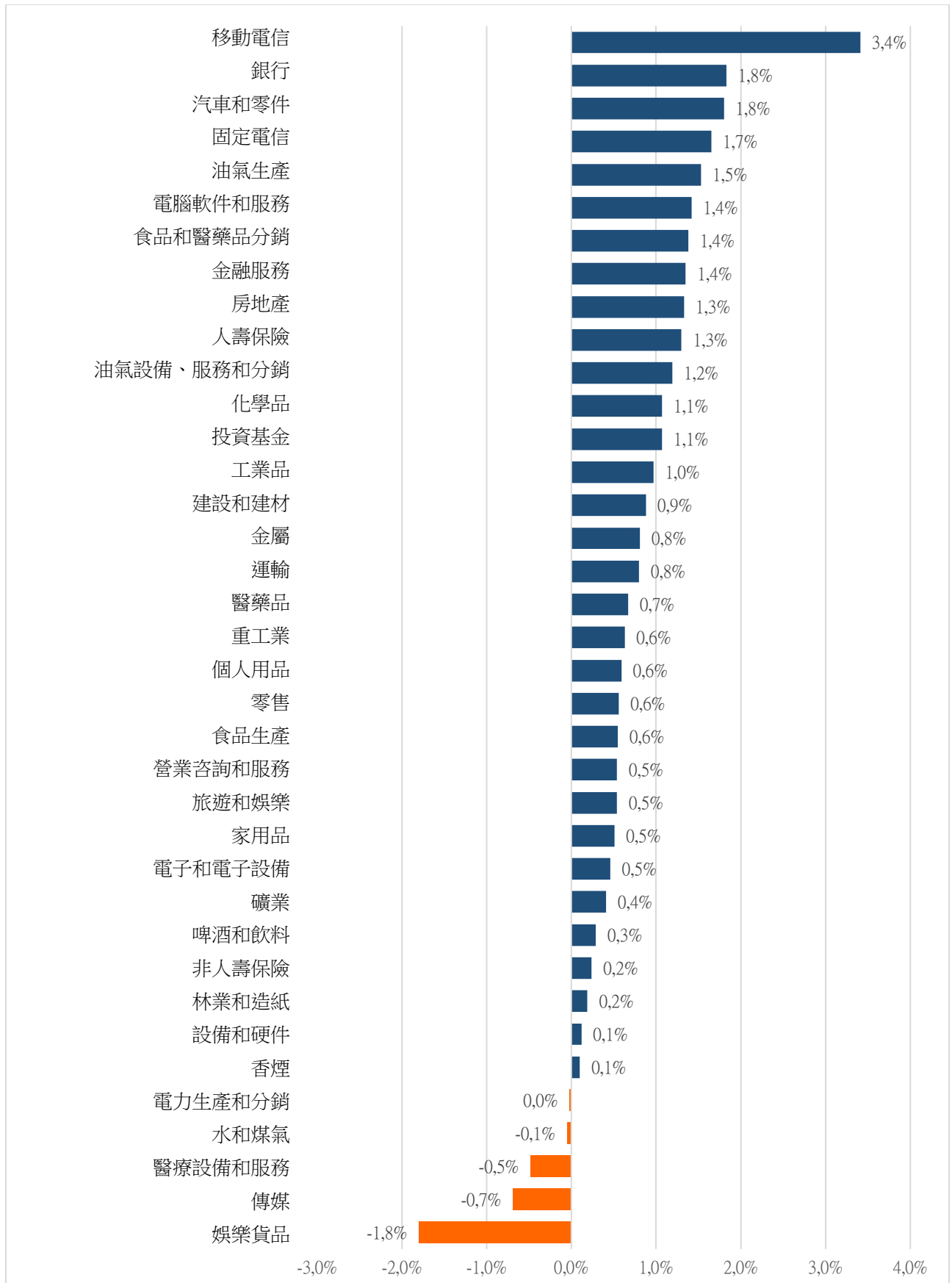
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢

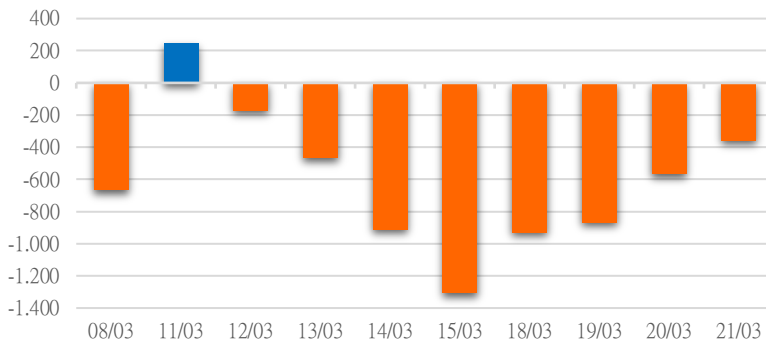


資料源: FiinPro - YSVN

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## 外資買進賣統計

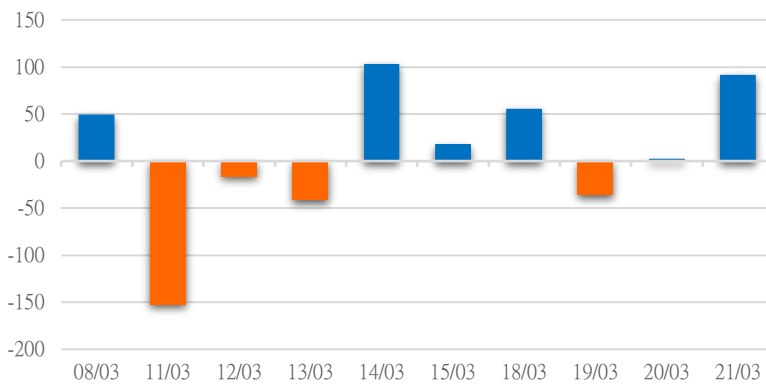
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VND	187,782	VNM	-202,424
KBC	148,127	MSN	-174,896
SSI	114,442	VHM	-165,102
STB	63,842	DIG	-146,892
MWG	51,068	PVD	-85,973

HSX 外資買/賣超的前 5 名

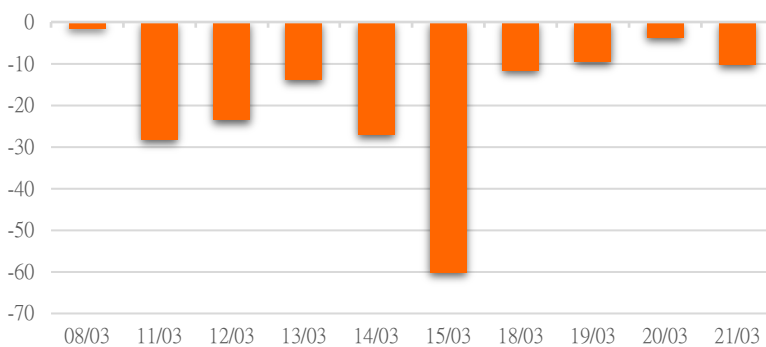
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SHS	42,242	BVS	-3,398
IDC	15,460	DTD	-3,026
HUT	15,036	GKM	-2,777
PVS	14,756	IVS	-1,569
TNG	5,128	SLS	-1,464

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	7,581	GDA	-7,746
VEA	917	QNS	-4,935
MCH	395	ACV	-3,117
DDV	363	NTC	-1,996
SGP	202	VGG	-910

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)
MSN	141,019	NVL	65,103
VHM	67,907	VIX	30,030
DIG	52,236	CII	26,709
STB	42,899	MWG	25,243
VPB	41,093	DBC	17,012

HSX 自營交易最大前名

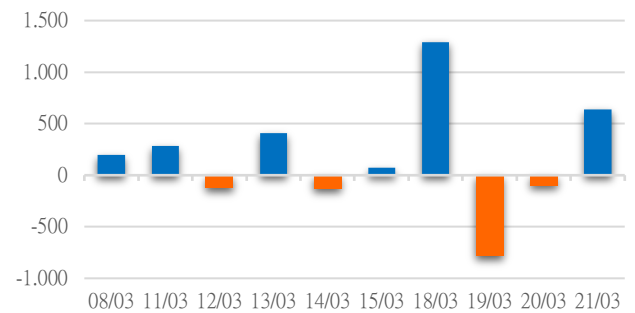
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MBS	14,145	PVS	19,230
L18	133	IDC	585

HNX 自營交易最大前名

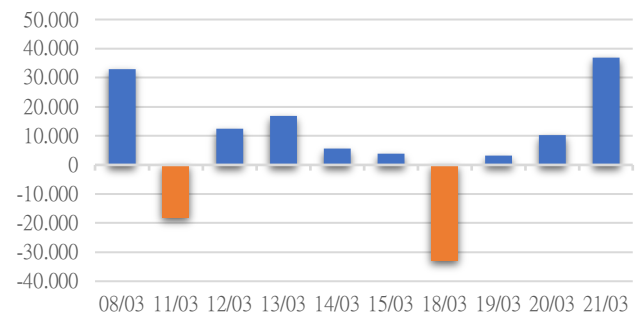
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DDV	4,310.26	TSJ	25,424
		GDA	15,007
		BSR	107
		L35	0
		SJM	0

UPCoM 自營交易最大前名

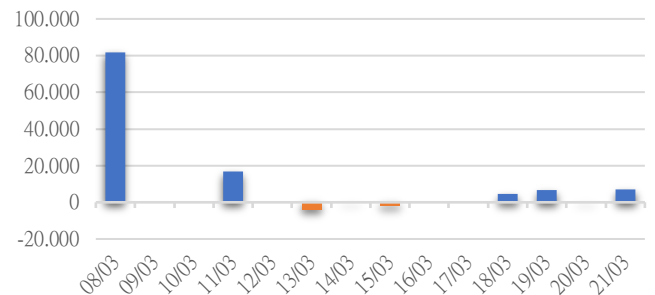
HSX 自營交易每日買/賣超 (BilVND)



HNX 自營交易每日買/賣超 (BilVND)



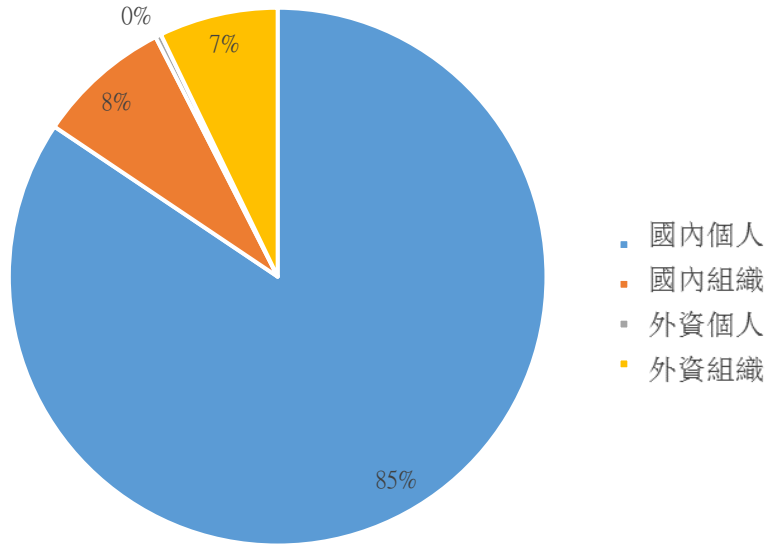
UPCOM 自營交易每日買/賣超 (BilVND)





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### 越南證券市場投資人類別統計

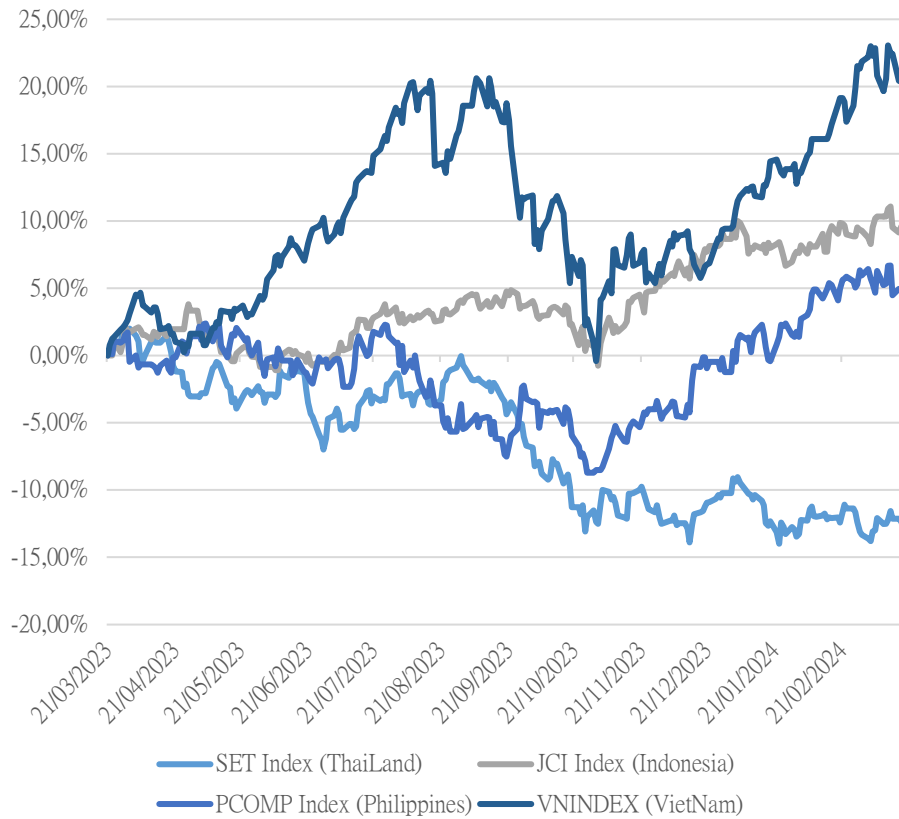


資料源: FiinPro - YSVN



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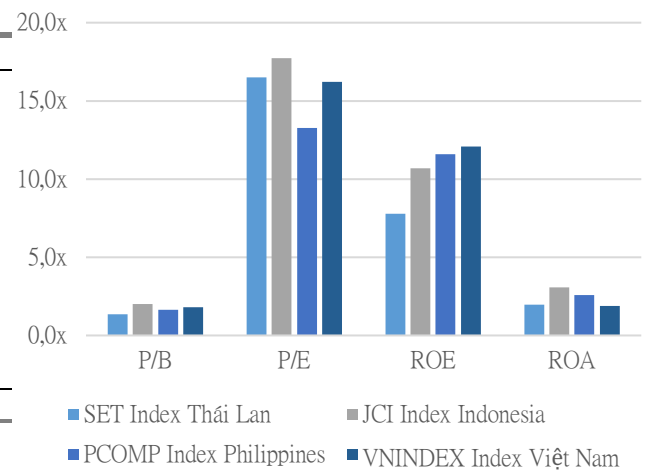
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.6x	1.8x
P/E		16.5x	17.7x	13.3x	16.2x
ROE	%	7.78	10.70	11.60	12.09
ROA	%	1.98	3.07	2.58	1.90
Vốn hóa	Tỷ USD	469.92	750.59	167.61	207.13
GTGD	Triệu USD	0.86	0.53	0.07	0.84
LS cổ tức	%	3.28	3.72	2.53	1.59

源：Bloomberg & YSVN







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