

當日市場：指數收盤上漲

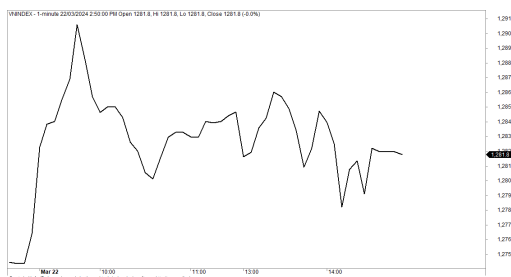
2024/03/25

市場走勢

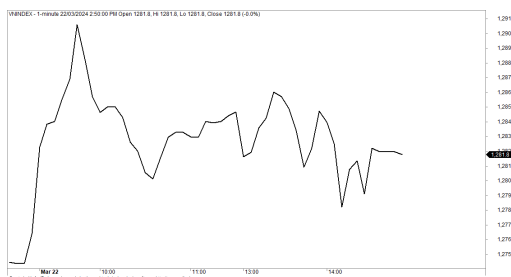
市場指數	VNI	HNI	UPCOM
收盤	1,281.80	241.68	90.95
%日	0.42%	0.22%	0.14%
%週	1.43%	0.89%	-0.44%
%月	4.44%	3.28%	0.42%
%年	23.19%	18.49%	19.83%
<b>成交值(Bil.VND)</b>			
當日	34,679	2,557	741
日均量/週	30,378	2,673	667
日均量/月	26,731	2,340	737
<b>外資進出</b>			
買進	5,930.78	60.36	33.47
賣出	6,391.96	83.46	21.03
買賣超	-461.18	-23.09	12.44
<b>市場漲跌家數</b>			
上漲	153	90	233
下跌	174	85	176
持平	92	150	494
<b>市場指標</b>			
P/E	14.78	19.93	17.68
總市值 (兆盾)	5,193	323	1,177
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場指數在本周的最後一個交易日波動較大，但需求在尾盤復甦，幫助指數收漲。VN-Index 收漲 0.42%，止於 1,281.8 點，HNX-Index 上漲 0.22%，Upcom-Index 上漲 0.14%。3 大市場的交易額均達到 37 兆 9,770 億越南盾。

金融股繼續強於其他股票，如 BID (2.26%)，儘管有時在盤中漲停。此外，CTG、MBB、VCB、VPB、STB、SHB 等均收盤上漲。相反，FPT、PLX、VRE、VNM 領跌，但僅下跌 1% 左右。

然而，中型股在本周的最後一個交易日錄得漲幅最大，得益於 GEX (6.4%)、HSG (2.42%)、DXG (1.79%)、KBC (3.48%) 等。

外資在連續第 9 個交易日在 3 大市場賣超 4,700 億越南盾，其中 VNM (2,190 億)、HPG (1,360 億)、VHM (1,160 億) 被拋售最多的股票。相反，GEX (1,930 億)、KBC (1,480 億)、PDR (1,220 億) 在買超方面領先。

市場短期觀點

我們認為市場可能會在本周的首個交易日出現調整階段，VN-Index 可能會重新測試 1,268 - 1,270 點的支撐位。同時，市場仍處於短期調整階段，因此 VN-Index 的價格走勢圖可能無法完全突破 1,270 點，並且可能會出現調整期以重新測試該支撐位。此外，我們評估短期風險仍然較低，因此價格走勢圖在下一個交易周可能會繼續上漲。

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，並在調整期買進新股。

從周線圖來看，VN-Index 收盤上漲 1.4%，成交量比前一周增加 20%。同時，市場仍處於明顯的趨勢階段，跟隨中期趨勢的市場寬度持續增加，顯示投資者仍可增加比例。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持有投資組合中較高比例的股票。

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	1300	1330	870	800
HNX-Index	上漲	上漲	260	306	189	160
VN30	上漲	上漲	1300	1336	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	1281.8	0.42%
VN30	1284.14	0.20%
VN Mid	1930.7	0.50%
VN Small	1508.69	-0.21%

河內交易所 (HSX)

	收盤	漲跌%
HNI	241.68	0.22%
HN30	531.76	0.38%
VNX AllSh	1301.41	0.26%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	90.95	0.14%

外資交易	成交值 (BiL.VND)
買進	5930.77575
賣出	6391.95722
買超/賣超	-461.181476

外資交易	成交值 (BiL.VND)
買進	60.36
賣出	83.46
買超/賣超	-23.09

外資交易	成交值 (BiL.VND)
買進	33.47
賣出	21.03
買超/賣超	12.44

上漲排名/ 股碼	漲跌(VND)	漲跌%
HPX	490	7.00%
AGM	520	6.91%
GEX	1500	6.40%
BSI	3500	5.93%
KBC	1200	3.48%

上漲排名/ 股碼	漲跌(VND)	漲跌%
TA9	1400	9.86%
HMR	1400	9.79%
VC7	1200	9.76%
MCO	2600	9.56%
TKG	600	8.70%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PIV	8401831	14.15%
DHB	133378000	14.13%
HTE	0	13.81%
ICF	5924970	12.98%
DDV	70871651	8.57%

下跌排名/ 股碼	漲跌(VND)	漲跌%
SJS	-2000	-2.64%
BFC	-800	-2.60%
LDG	-80	-2.54%
VTP	-2100	-2.32%
DRC	-650	-1.97%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ITQ	-100	-3.03%
MST	-200	-2.67%
IVS	-300	-2.26%
MBG	-100	-2.17%
TTH	-100	-2.08%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BOT	-181	-5.48%
PXL	-242	-1.73%
MCH	-1962	-1.50%
DRI	-123	-1.11%
NTC	-1471	-0.74%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VCB	538,788,398
BID	308,963,626
CTG	191,708,705
VHM	186,366,928
GAS	184,887,558

市值排名/ 股碼	BiL.VND
IDC	19,634,996
PVS	18,401,702
HUT	17,136,230
SHS	16,263,135
THD	13,474,999

市值排名/ 股碼	BiL.VND
ACV	186,179,332
VGI	112,824,950
MCH	92,585,688
BSR	59,563,698
VEA	48,393,567

交易量排名/ 股碼	成交值	30 日均
ACB	168,026,000	12,094,768
GEX	74,702,800	20,949,325
MBB	41,742,700	29,635,457
VIX	39,471,700	35,703,202
HPG	37,701,300	33,425,298

交易量排名/ 股碼	成交值	30 日均
SHS	30,731,453	31,329,288
CEO	24,281,470	14,332,782
PVS	7,400,223	7,728,428
MBS	5,361,484	5,384,477
HUT	4,338,484	5,748,074

交易量排 名/股碼	成交值	30 日均
BSR	6,758,256	6,559,093
PVX	5,717,751	443,670
DDV	4,187,879	2,251,552
NED	3,242,369	558,881
SBS	3,078,351	3,208,015

資料源: Bloomberg & Yuanta Research

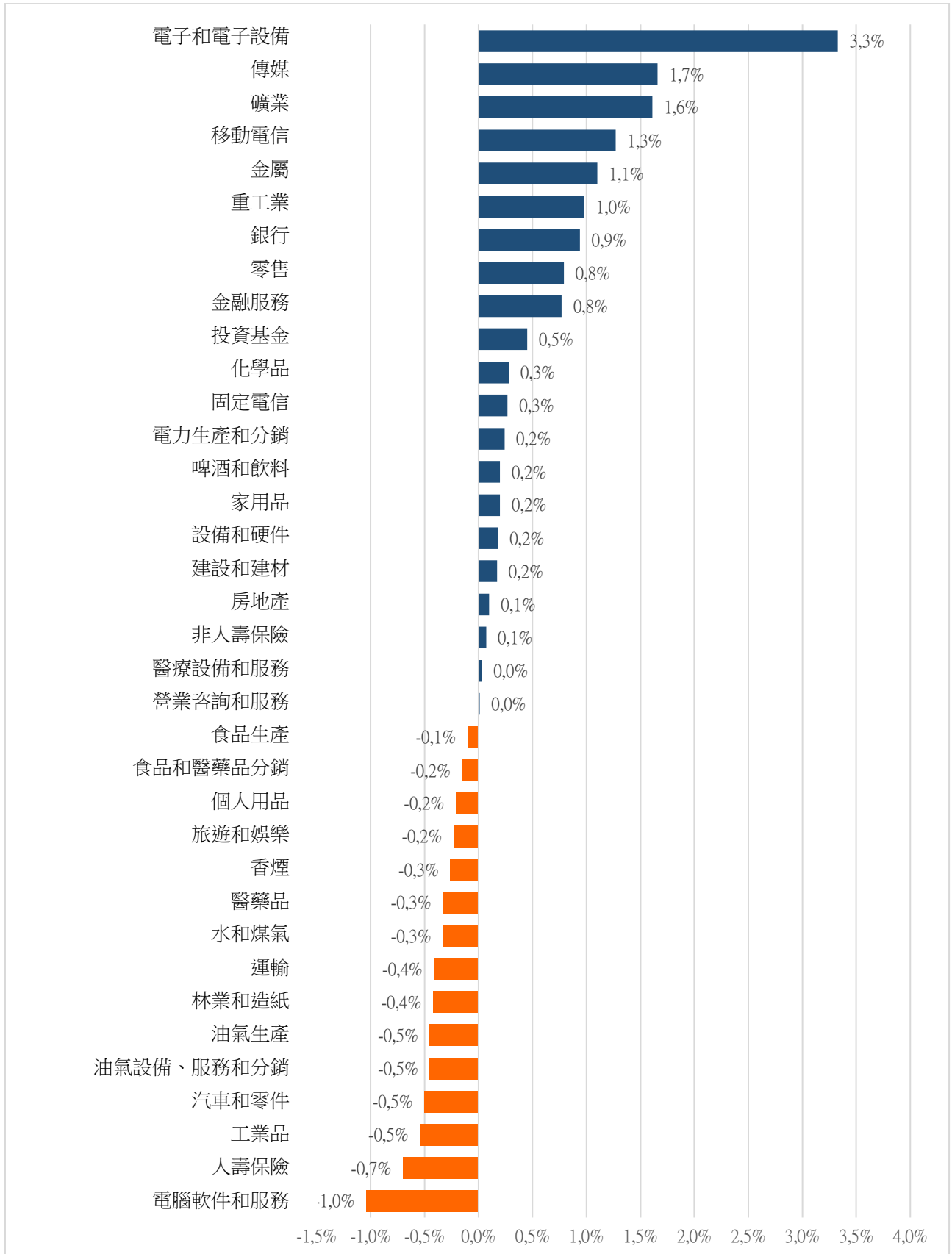
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢

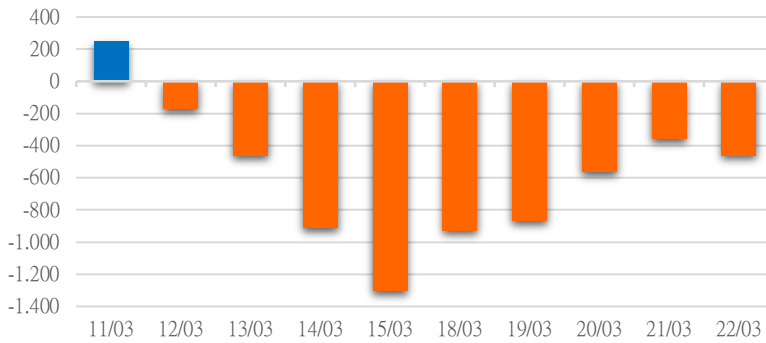


資料源: FiinPro - YSVN

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## 外資買進賣統計

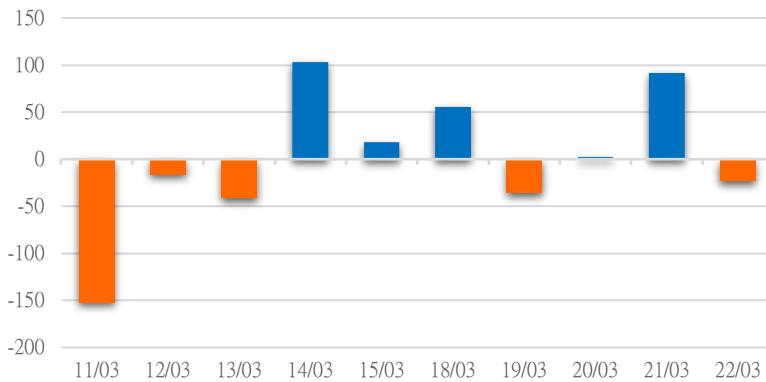
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
GEX	192,829	VNM	-219,232
KBC	147,671	HPG	-135,790
PDR	122,175	VHM	-112,017
VCB	78,837	DIG	-78,152
STB	42,036	PVD	-69,632

HSX 外資買/賣超的前 5 名

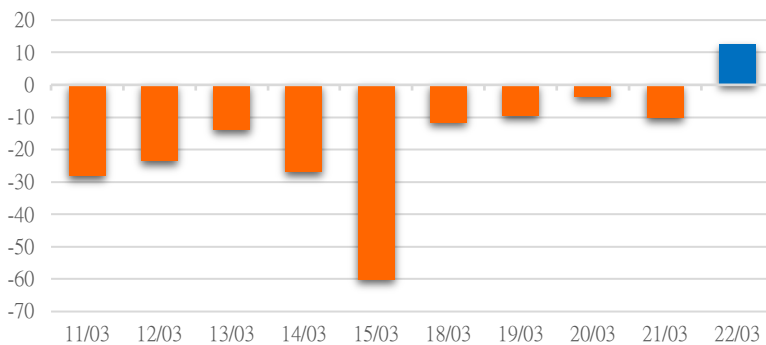
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	19,983	SHS	-25,075
GKM	3,364	PVS	-11,162
PLC	2,727	NRC	-8,699
VC7	2,715	HUT	-3,801
L14	2,449	TA9	-2,681

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	7,477	QNS	-7,238
ACV	5,006	NTC	-1,982
DDV	4,021	VGI	-113
VEA	3,735	VGG	-105
SGP	577	MCH	-103

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)
KBC	57,957	STB	63,157
SSI	39,093	FUEVFNVD	60,777
PNJ	20,477	EIB	55,869
GMD	12,350	VIX	40,560
DCM	7,221	MBB	37,601

HSX 自營交易最大前名

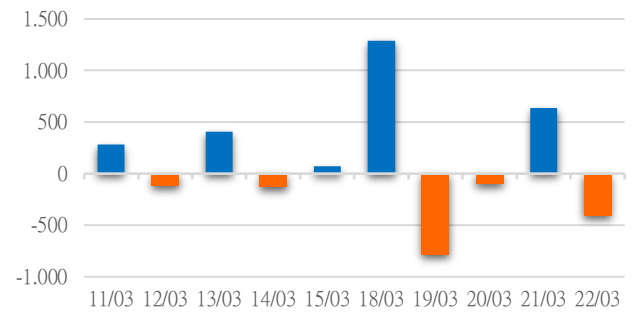
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	7,636	IDC	11,901
MBS	5,046	GKM	3,300
SHS	1,990		

HNX 自營交易最大前名

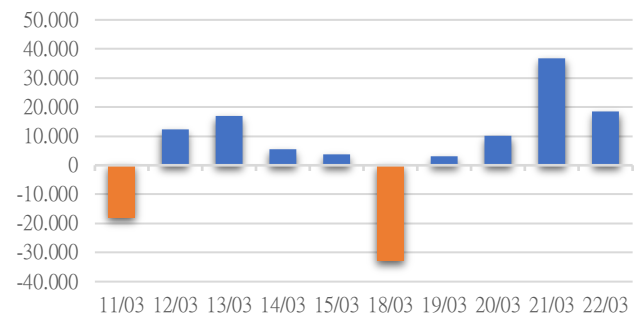
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
FOX	732.06	BSR	882
		VXB	1
		VTL	0
		LM3	0
		NGC	0

UPCoM 自營交易最大前名

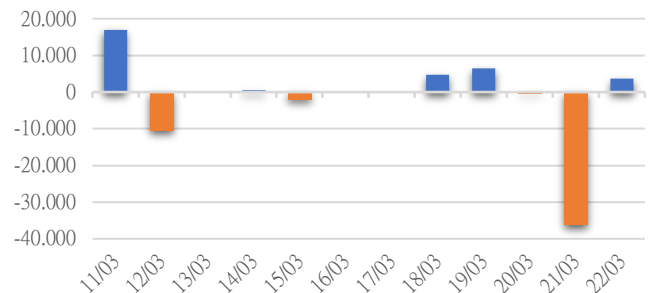
HSX 自營交易每日買/賣超 (BiVND)



HNX 自營交易每日買/賣超 (BiVND)



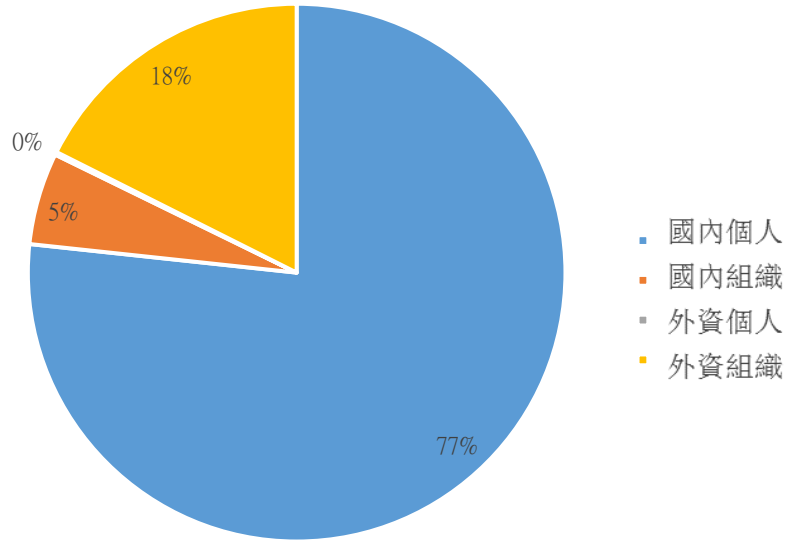
UPCoM 自營交易每日買/賣超 (BiVND)





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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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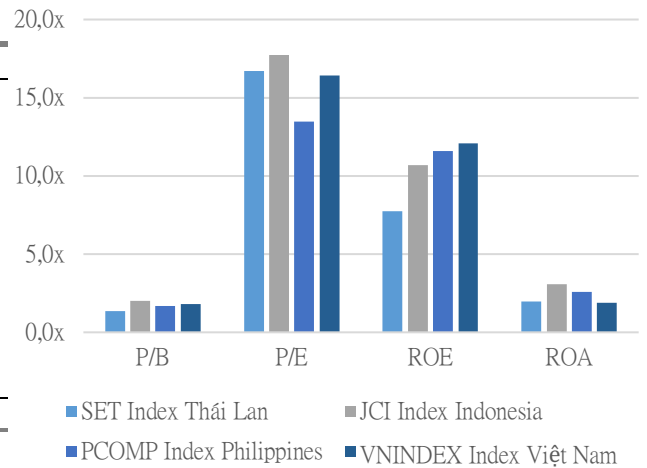
### 東南亞主要市場走勢比較



### 東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.7x	1.8x
P/E		16.7x	17.7x	13.5x	16.4x
ROE	%	7.76	10.70	11.60	12.08
ROA	%	1.98	3.07	2.58	1.90
Vốn hóa	Tỷ USD	470.02	744.84	169.35	209.88
GTGD	Triệu USD	1.10	0.60	0.08	1.11
LS cổ tức	%	3.29	3.73	2.56	1.59

源: Bloomberg & YSVN







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## Appendix A: Important Disclosures

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