

## 當日市場：短期拋售力占主導地位

2024/03/26

### 市場走勢

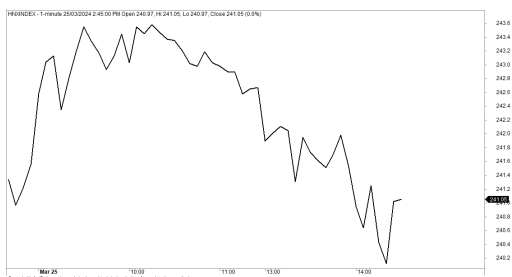
市場指數	VNI	HNI	UPCOM
收盤	1,267.86	240.81	91.09
%日	-1.09%	-0.36%	0.16%
%週	1.95%	1.74%	0.85%
%月	4.61%	4.21%	1.03%
%年	21.12%	17.06%	19.59%
<b>成交值(Bil.VND)</b>			
當日	29,205	2,930	616
日均量/週	27,603	2,478	613
日均量/月	26,603	2,371	721
<b>外資進出</b>			
買進	1,568.85	95.22	44.39
賣出	2,108.87	60.97	27.49
買賣超	-540.01	34.25	16.90
<b>市場漲跌家數</b>			
上漲	80	65	152
下跌	243	93	152
持平	96	167	599
<b>市場指標</b>			
P/E	14.62	19.68	17.67
總市值 (兆盾)	5,137	322	1,177
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

### VNINDEX



### HNIINDEX



### 市場走勢

在大量短期不利資訊出現的背景下，市場錄得相對較好的跌幅。VN-Index 收跌 1.09% 至 1267.86 點，HNX-Index 下跌 0.36%，Upcom-Index 上漲 0.16%。3 大市場的交易額均達到 32 兆 7,510 億越南盾。

大型股錄得較大的拋售壓力，包括 GVR (-4.06%)、CTG (-2.8%)、MSN (-3.82%)、STB (-2.53%)、VRE (-2.43%)、ACB (-2.31%)、BID (-2.21%) 等被強勁拋售。相反，TPB (1.33%)、VIC (0.54%)、BVH (0.71%)、VPB (0.53%) 是 VN30-Index 中上漲的股票。

中型房地產股是當日的亮點，如 NVL (3.51%)、KHG (2.35%)、NLG (0.46%)、DIG (0.16%) 等上漲。HPX (6.94%) 解停後在連續第 4 個交易日漲停。

外資在連續 10 個交易日在 3 大市場賣超 4,880 億越南盾，其中 VNM (1,640 億)、MSN (1,340 億)、VHM (1,030 億) 被拋售最多的股票。相反，NVL (2,370 億)、PDR (610 億)、STB (410 億) 在買超方面領先。

### 市場短期觀點

我們認為市場可能會繼續調整，但市場在下一個交易日可能會快速再次上漲。同時，市場仍能出現調整階段，但調整期可能會快速結束，市場可能會快速再次上漲，並在各類股票之間分化。此外，短期情緒指標小幅下跌，顯示短期投資者再次轉為謹慎態度。

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在投資組合中持有較高比例的股票，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	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	1267.86	-1.09%
VN30	1270	-1.10%
VN Mid	1907.75	-1.19%
VN Small	1499.04	-0.64%

河內交易所 (HSX)

	收盤	漲跌%
HNI	240.81	-0.36%
HN30	528.87	-0.54%
VNX AllSh	1287.14	-1.10%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	91.09	0.16%

外資交易	成交值 (BiL.VND)
買進	1568.85402
賣出	2108.86739
買超/賣超	-540.013366

外資交易	成交值 (BiL.VND)
買進	95.22
賣出	60.97
買超/賣超	34.25

外資交易	成交值 (BiL.VND)
買進	44.39
賣出	27.49
買超/賣超	16.90

上漲排名/ 股碼	漲跌(VND)	漲跌%
TVB	580	6.97%
HPX	520	6.94%
QCG	700	6.86%
DHM	660	6.78%
DRH	180	3.71%

上漲排名/ 股碼	漲跌(VND)	漲跌%
TVC	500	5.56%
TTH	200	4.26%
VC7	500	3.70%
VTV	200	3.23%
HLC	400	2.84%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DHB	133378000	14.29%
VEF	81635584	11.67%
TOS	0	8.10%
VRG	12678595	5.16%
CST	0	4.52%

下跌排名/ 股碼	漲跌(VND)	漲跌%
RDP	-560	-7.00%
GTA	-900	-6.67%
VTP	-5000	-5.66%
GIL	-1750	-4.61%
AGM	-340	-4.22%

下跌排名/ 股碼	漲跌(VND)	漲跌%
MCO	-2900	-9.73%
VMS	-2200	-7.17%
WSS	-200	-3.12%
MST	-200	-2.74%
TKG	-200	-2.67%

下跌排名/ 股碼	漲跌(VND)	漲跌%
HSV	-524	-6.16%
VGI	-968	-2.61%
MCH	-2853	-2.21%
VGT	-225	-1.79%
BMS	-176	-1.41%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VCB	534,876,034
BID	302,123,103
CTG	186,338,714
VHM	185,278,337
GAS	184,657,884

市值排名/ 股碼	BiL.VND
IDC	19,139,996
PVS	18,592,889
HUT	17,136,230
SHS	16,344,451
THD	13,436,499

市值排名/ 股碼	BiL.VND
ACV	184,180,892
VGI	109,978,986
MCH	90,511,375
BSR	59,811,738
VEA	48,275,304

交易量排名/ 股碼	成交值	30 日均
NVL	110,483,300	25,187,292
VND	86,275,500	35,449,571
VIX	40,039,600	36,860,246
GEX	35,731,300	23,989,783
HPX	34,551,100	1,269,358

交易量排名/ 股碼	成交值	30 日均
SHS	39,879,054	32,231,780
CEO	20,331,389	15,190,068
PVS	14,198,229	7,829,361
HUT	6,303,099	5,596,210
MBS	5,901,436	5,425,658

交易量排 名/股碼	成交值	30 日均
BSR	6,591,374	6,575,929
DDV	3,812,312	2,337,803
SBS	2,611,357	3,252,587
C4G	2,434,556	1,391,094
AAS	2,009,289	2,191,700

資料源: Bloomberg & Yuanta Research

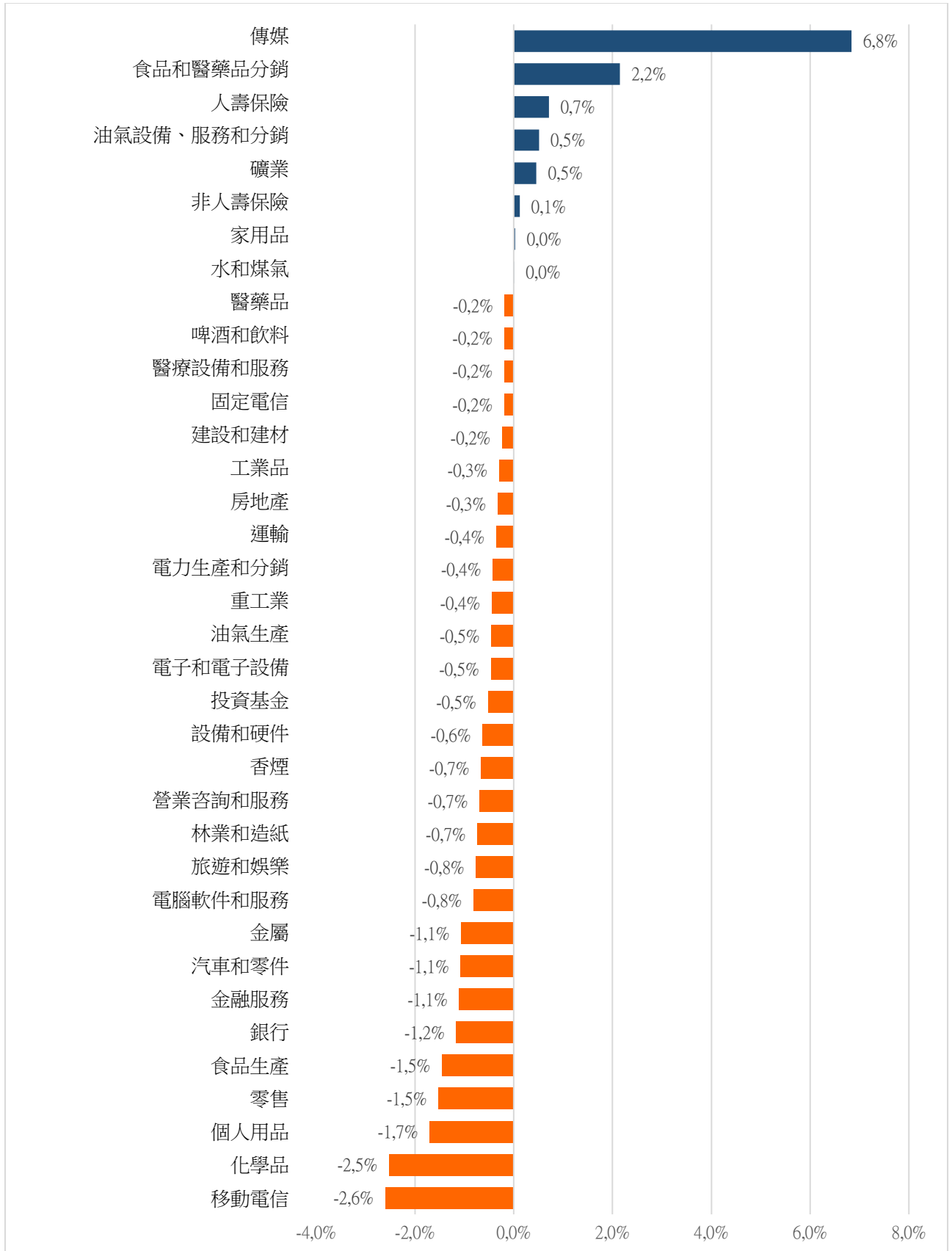
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



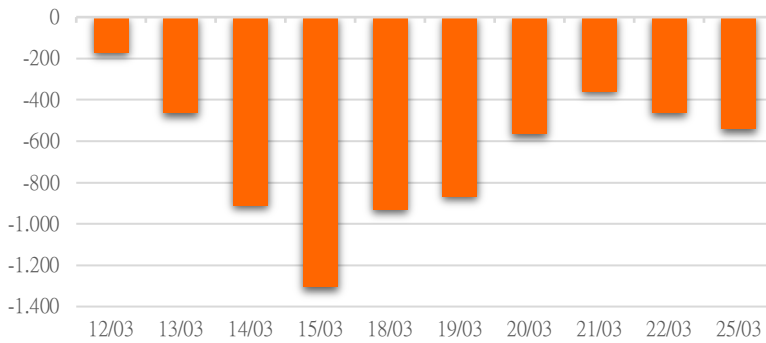
資料源: FimPro - YSVN



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## 外資買進賣統計

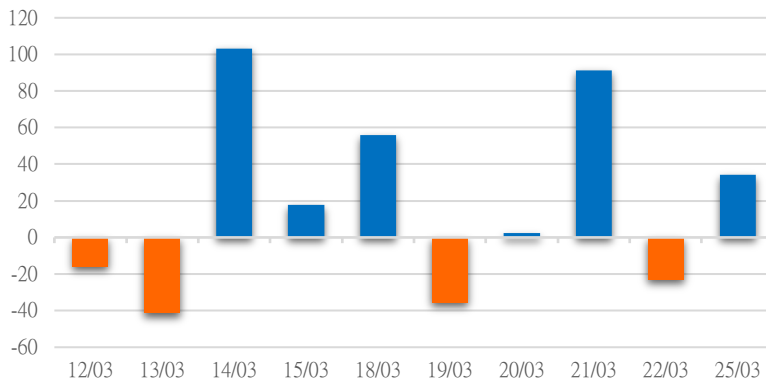
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
NVL	237,368	VNM	-163,703
PDR	61,528	MSN	-134,844
STB	40,758	VHM	-103,265
VCB	37,696	VND	-89,185
SSI	30,498	PVD	-55,185

HSX 外資買/賣超的前 5 名

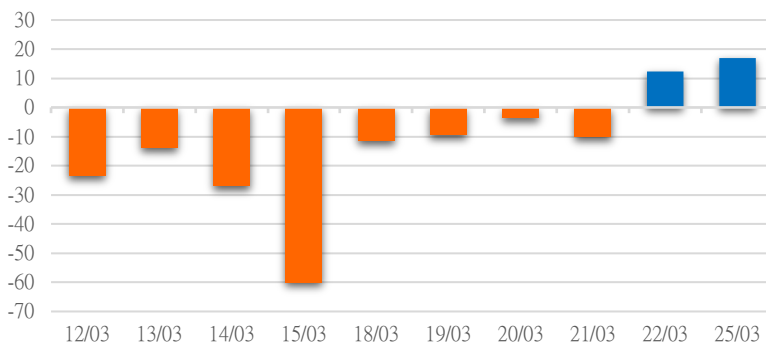
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	33,396	SHS	-4,682
IDC	7,013	TIG	-3,615
CEO	2,898	TA9	-828
TNG	1,824	DHT	-825
HLC	1,529	MST	-706

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)
DDV	14,171	QNS	-4,010
AAS	4,569	BSR	-3,522
VGT	3,106	HC3	-125
ACV	1,407	VGG	-97
VEA	938	IFS	-90

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)
EIB	64,990	GEX	213,260
SSI	42,480	FPT	60,223
E1VFN30	41,215	MSN	55,852
NAB	21,000	TCB	50,237
FUEVFVND	18,162	VPB	47,418

HSX 自營交易最大前名

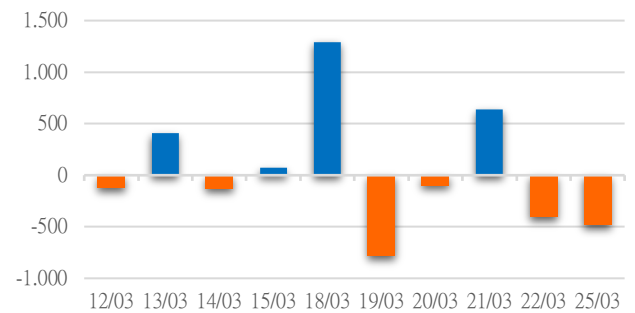
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	1,765	PVS	5,900
L18	365	MBS	5,060
		NTP	236

HNX 自營交易最大前名

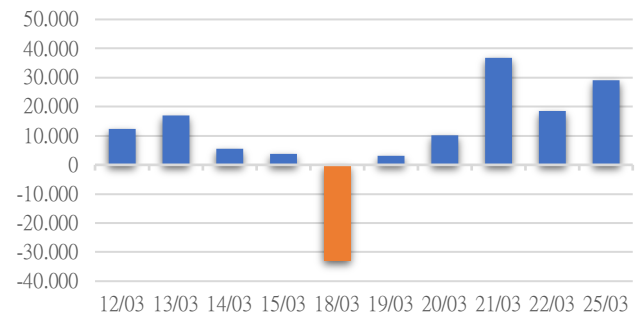
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BSR	955.00	VGT	1,860
FOX	290.00	DDV	1,630

UPCoM 自營交易最大前名

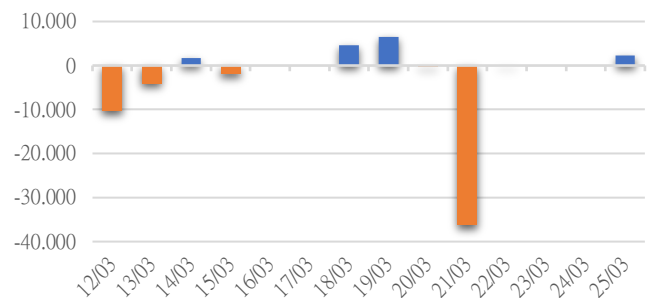
HSX 自營交易每日買/賣超 (BilVND)



HNX 自營交易每日買/賣超 (BilVND)



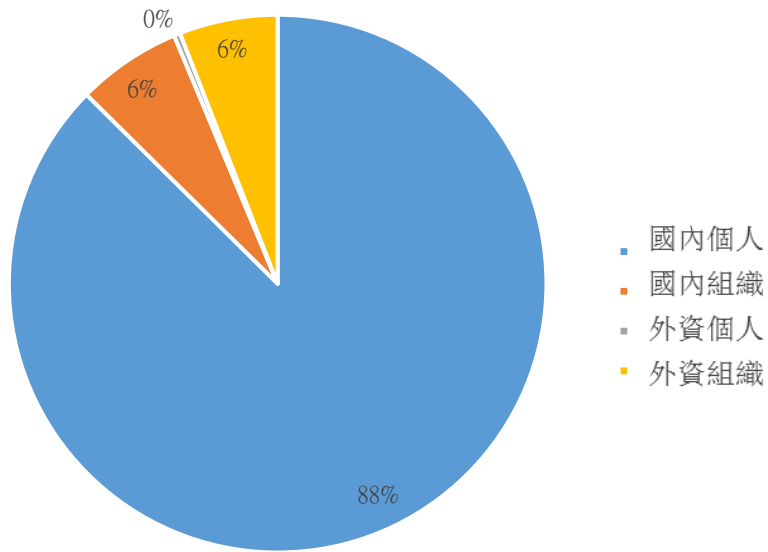
UPCoM 自營交易每日買/賣超 (BilVND)





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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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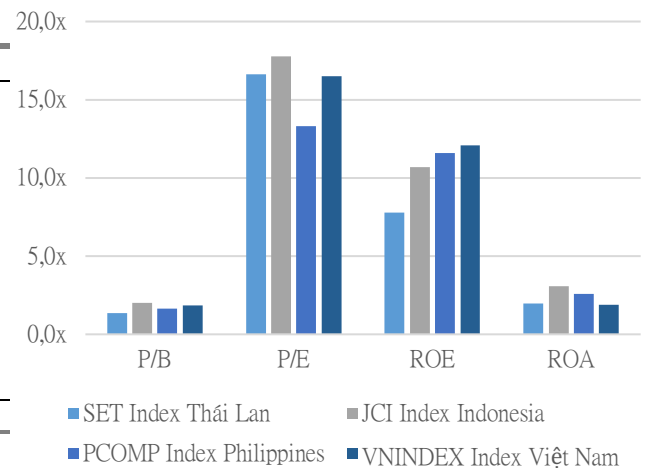
### 東南亞主要市場走勢比較



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		16.6x	17.8x	13.3x	16.5x
ROE	%	7.77	10.70	11.60	12.08
ROA	%	1.98	3.07	2.58	1.90
Vốn hóa	Tỷ USD	467.51	744.99	167.51	210.94
GTGD	Triệu USD	0.97	0.52	0.08	1.17
LS cổ tức	%	3.32	3.72	2.57	1.61

源：Bloomberg & YSVN



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





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## 元大證券（越南）公司

### 個人客戶分析部

**Nguyễn Th ê Minh**  
研究分析經理  
+84 28 3622 6868 ext 3826  
minh.nguyen@yuanta.com.vn

**Lý Thị Hi ền**  
研究分析主管  
+84 28 3622 6868 ext 3908  
hien.ly@yuanta.com.vn

**Quách Đức Khánh**  
研究分析副主管  
+84 28 3622 6868 ext 3833  
khanh.quach@yuanta.com.vn

**Khổng Hữu Hiệp**  
高級分析專員  
+84 28 3622 6868 ext 3912  
hiiep.khong@yuanta.com.vn

**Nguyễn Trịnh Ngọc Hồng**  
高級分析專員  
+84 28 3622 6868 ext 3832  
hong.nguyen@yuanta.com.vn

**Phạm Tấn Phát**  
高級分析專員  
+84 28 3622 6868 ext 3880  
phat.pham@yuanta.com.vn

### 個人客戶業務部

**Phạm Đắc Thành**  
北部營業中心經理  
+84 28 3622 6868 ext 3416  
thanh.pham@yuanta.com.vn

**Võ Thị Thu Thủy**  
平陽分行經理  
+84 28 3622 6868 ext 3505  
thuy.vo@yuanta.com.vn

**Lương Kỳ Ty**  
堤岸分行經理  
+84 28 3622 6868 ext 3653  
ty.luong@yuanta.com.vn

**Bùi Quốc Phong**  
同奈分行經理  
+84 28 3622 6868 ext 3701  
phong.bui@yuanta.com.vn

**Võ Đình Tuấn**  
峴港分行經理  
+84 28 3622 6868 ext 3301  
tuan.vo@yuanta.com.vn

**Nguyễn Việt Quang**  
河內分行經理  
+84 28 3622 6868 ext 3404  
quang.nguyen@yuanta.com.vn

**Đinh Thị Thu Cúc**  
頭頓分行經理  
+84 28 3622 6868 ext 3203  
cuc.dinh@yuanta.com.vn



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