

當日市場：指數再次復甦

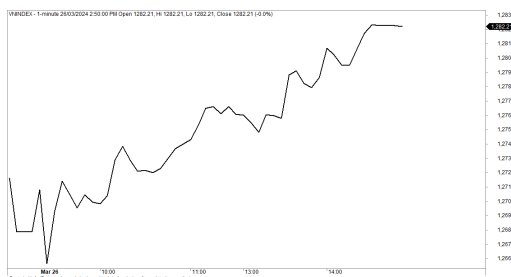
2024/03/27

市場走勢

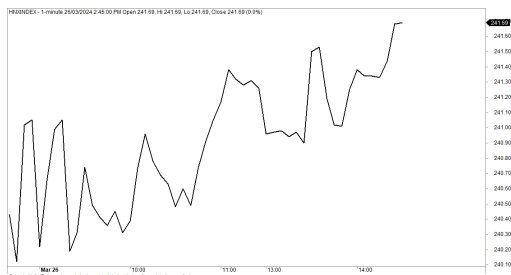
市場指數	VNI	HNI	UPCOM
收盤	1,282.21	242.03	91.20
%日	1.13%	0.50%	0.12%
%週	3.20%	2.49%	0.66%
%月	4.74%	3.94%	0.78%
%年	22.49%	17.65%	19.73%
<b>成交值(Bil.VND)</b>			
當日	21,857	1,755	505
日均量/週	27,651	2,485	607
日均量/月	26,648	2,368	713
<b>外資進出</b>			
買進	1,808.44	54.33	54.72
賣出	1,983.17	130.19	18.32
買賣超	-174.73	-75.85	36.41
<b>市場漲跌家數</b>			
上漲	241	111	146
下跌	101	55	180
持平	77	159	577
<b>市場指標</b>			
P/E	14.82	19.76	17.66
總市值 (兆盾)	5,195	324	1,179
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在經歷了前一個交易日的下跌之後迅速復甦。上漲趨勢一直維持至尾盤，所有指數均收於當日最高價格區間。具體而言，VN-Index 收漲 1.13% 至 1,282.21 點，HNX-Index 上漲 0.5%，Upcom-Index 上漲 0.12%。3 大市場的交易額均達到 24 兆 1,170 億越南盾。

銀行股再次轉正，尤其是近期漲幅不大的股票，如 VPB (3.7%) 在連續第二個交易日大幅上漲。此外，VIB (1.67%)、HDB (2.76%)、MBB (2.23%)、CTG (1.44%)、ACB (1.64%)、TCB (2.57%) 以及 GVR (6.27%)、HPG (1.16%)、SSI (1.33%) 幫助指數上漲的股票。相反，MSN (-1.99%) 在連續第三個交易日調整。

證券 (VIX、VCI)、房地產 (DPR、KBC、PDR、GVR)、海鮮 (ASM、IDI、VHC、FMC) 積極上漲。

外資在連續 11 個交易日在 3 大市場賣超 2,150 億越南盾，其中 VND (3,960 億)、MWG (1,410 億) 和 VNM (570 億) 被拋售最多的股票。相反，PDR (1,220 億)、VPB (940 億)、GEX (820 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持續上漲，VN-Index 可能會重新測試 2024 年 3 月 22 日的最高水平 (即 1,291 點)。流動性走弱顯示投資者對當前市場走勢仍持謹慎態度，但市場寬度可能更加積極，尤其是若市場在下一個交易日保持上漲勢頭，我們的預測是短期趨勢在接下來的幾個交易日可能會變得更加明顯。

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高比例的股票，並在調整期間買進新股。

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	1282.21	1.13%
VN30	1286.23	1.28%
VN Mid	1934.36	1.39%
VN Small	1513.72	0.98%

河內交易所 (HSX)

	收盤	漲跌%
HNI	242.03	0.50%
HN30	532.84	0.75%
VNX AllSh	1303.77	1.29%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	91.2	0.12%

外資交易	成交值 (BiL.VND)
買進	1808.43602
賣出	1983.16539
買超/賣超	-174.729367

外資交易	成交值 (BiL.VND)
買進	54.33
賣出	130.19
買超/賣超	-75.85

外資交易	成交值 (BiL.VND)
買進	54.72
賣出	18.32
買超/賣超	36.41

上漲排名/ 股碼	漲跌(VND)	漲跌%
D2D	2900	6.99%
VRC	750	6.98%
DPR	2750	6.95%
NHA	1400	6.91%
ITC	800	6.90%

上漲排名/ 股碼	漲跌(VND)	漲跌%
HMR	1600	9.94%
LDP	1600	9.58%
AMV	300	7.89%
TA9	800	5.10%
CMS	700	4.19%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DHB	133378000	13.12%
DRI	36532422	10.39%
VEF	81635584	4.42%
CST	0	4.03%
VEA	604643790	2.74%

下跌排名/ 股碼	漲跌(VND)	漲跌%
RDP	-520	-6.99%
AGM	-410	-5.32%
EVG	-130	-2.13%
VND	-500	-2.09%
MSN	-1500	-1.99%

下跌排名/ 股碼	漲跌(VND)	漲跌%
MCO	-2000	-7.43%
C69	-200	-2.60%
TTH	-100	-2.04%
IPA	-300	-1.79%
TVC	-100	-1.05%

下跌排名/ 股碼	漲跌(VND)	漲跌%
HSV	-331	-4.14%
VHG	-67	-2.48%
MSR	-393	-2.46%
DSC	-521	-2.07%
BMS	-245	-1.99%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	BiL.VND
VCB	538,229,489
BID	302,123,103
CTG	189,023,710
VHM	186,149,210
GAS	185,346,906

市值排名/ 股碼	BiL.VND
IDC	19,304,996
PVS	18,688,482
HUT	17,136,230
SHS	16,588,398
THD	13,551,999

市值排名/ 股碼	BiL.VND
ACV	183,140,309
VGI	111,132,591
MCH	90,121,769
BSR	59,687,718
VEA	49,554,938

交易量排名/ 股碼	成交值	30 日均
VND	81,881,300	37,919,902
NVL	49,147,200	28,673,711
VPB	43,837,300	17,862,090
VIX	35,860,900	36,992,934
GEX	29,616,200	24,740,265

交易量排名/ 股碼	成交值	30 日均
SHS	22,543,685	32,901,962
CEO	11,675,113	15,642,491
AMV	6,962,483	1,152,850
PVS	6,598,530	8,121,808
MBS	3,405,145	5,417,028

交易量排 名/股碼	成交值	30 日均
BSR	4,596,087	6,513,777
DDV	3,728,881	2,432,251
DGT	2,097,800	487,288
DRI	1,796,230	783,699
SBS	1,663,611	3,271,936

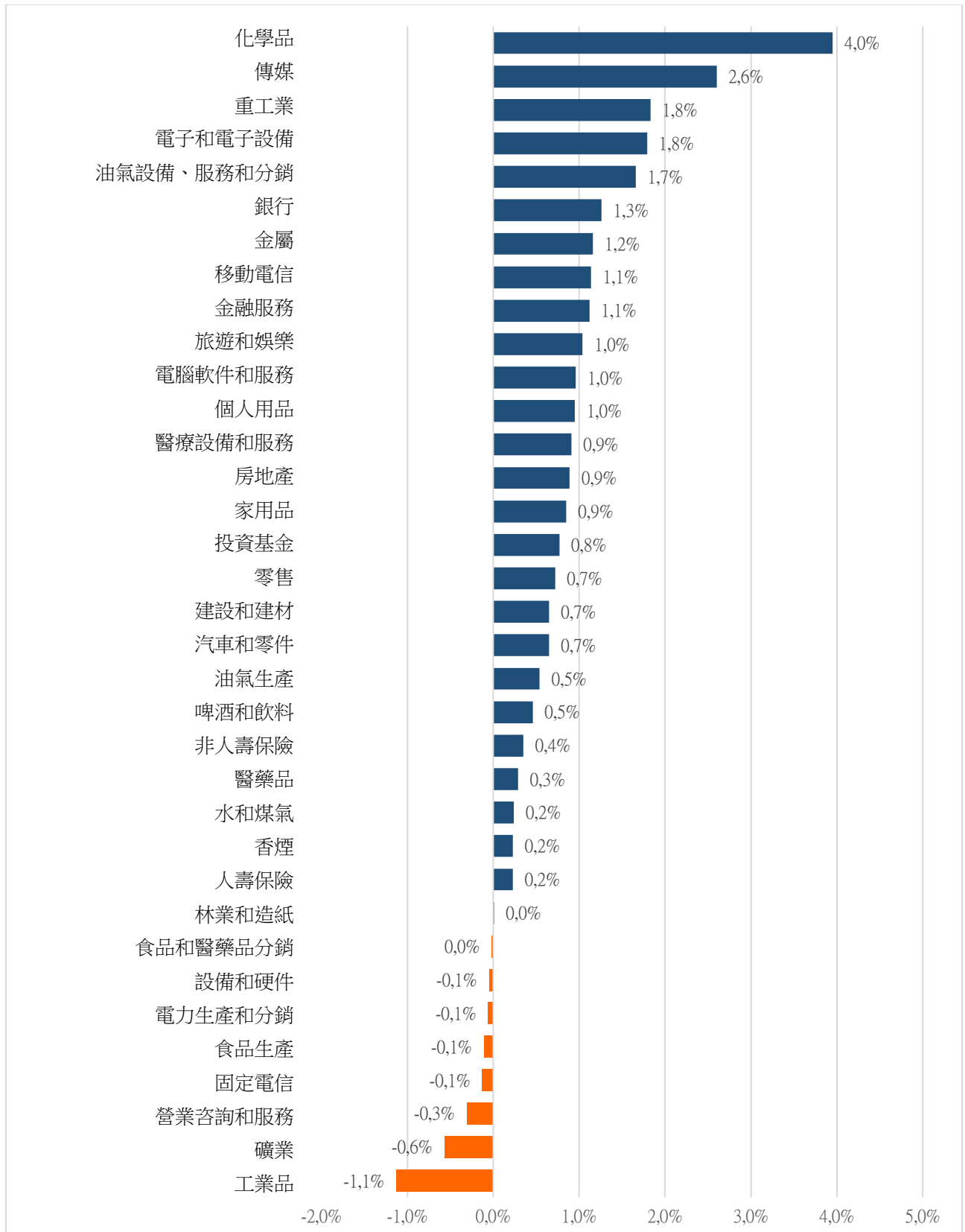
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



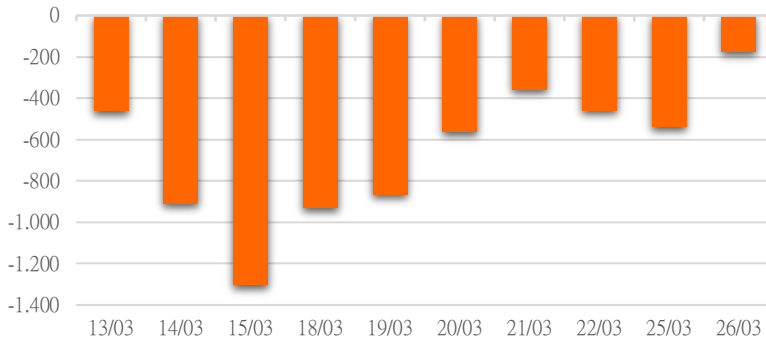
資料源: FimPro - YSVN



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## 外資買進賣統計

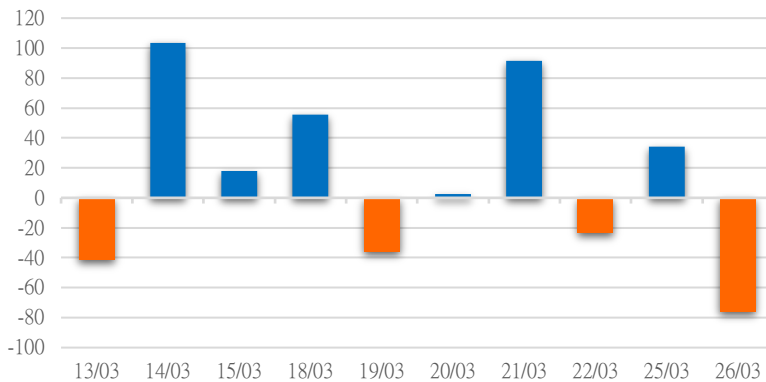
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PDR	121,350	VND	-395,466
VPB	94,195	MWG	-140,770
GEX	82,137	VNM	-56,582
VIX	57,938	STB	-46,728
KDH	50,161	DGW	-35,966

HSX 外資買/賣超的前 5 名

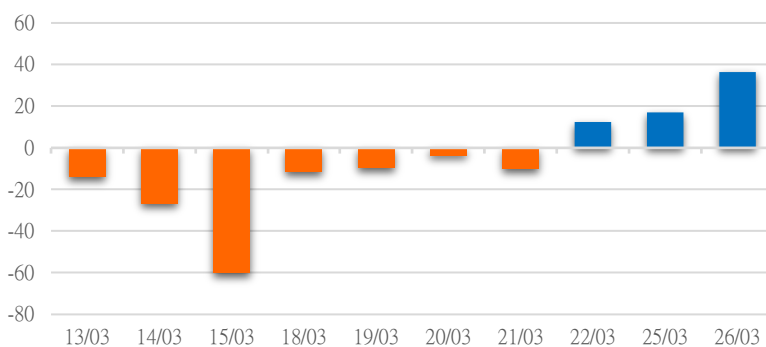
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DTD	5,728	SHS	-44,898
IDC	1,924	PVS	-20,402
TNG	1,370	MBS	-7,963
CEO	1,255	HUT	-7,210
PVI	522	TA9	-1,156

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	15,067	ACV	-1,869
VEA	11,075	PHP	-283
BSR	6,554	VGG	-241
VGT	2,304	IFS	-152
MPC	1,969	MH3	-66

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)
E1VFN30	45,024	MSN	251,061
VPB	31,517	GEX	30,904
STB	25,949	FPT	26,446
MWG	21,257	NLG	24,082
SSI	20,422	KDH	15,345

HSX 自營交易最大前名

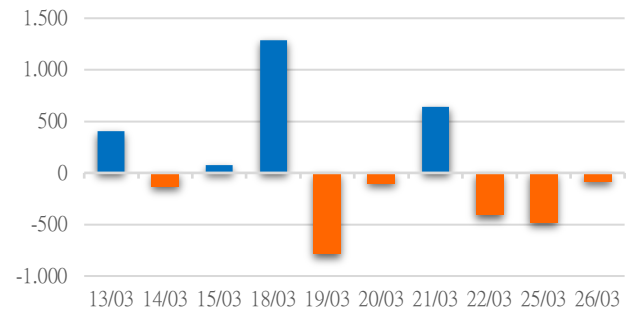
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	5,845		
IDC	1,571		

HNX 自營交易最大前名

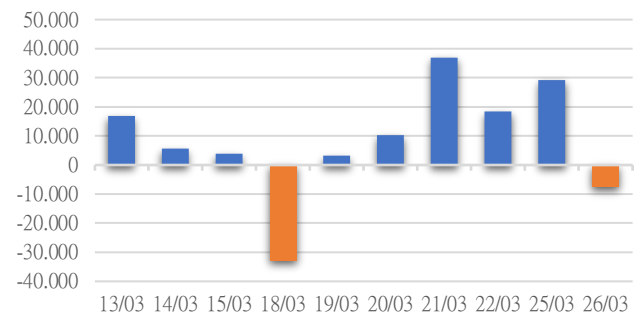
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VEA	2,444.50	DDV	4,207
FOX	557.68		

UPCoM 自營交易最大前名

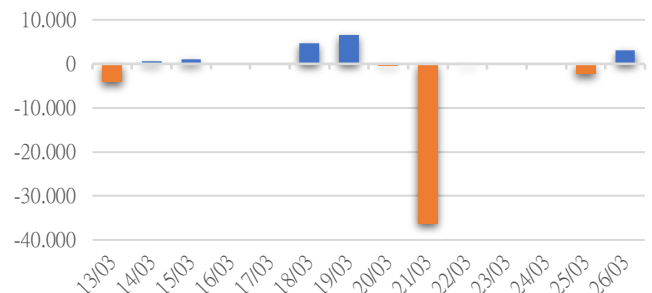
HSX 自營交易每日買/賣超 (BiVND)



HNX 自營交易每日買/賣超 (BiVND)



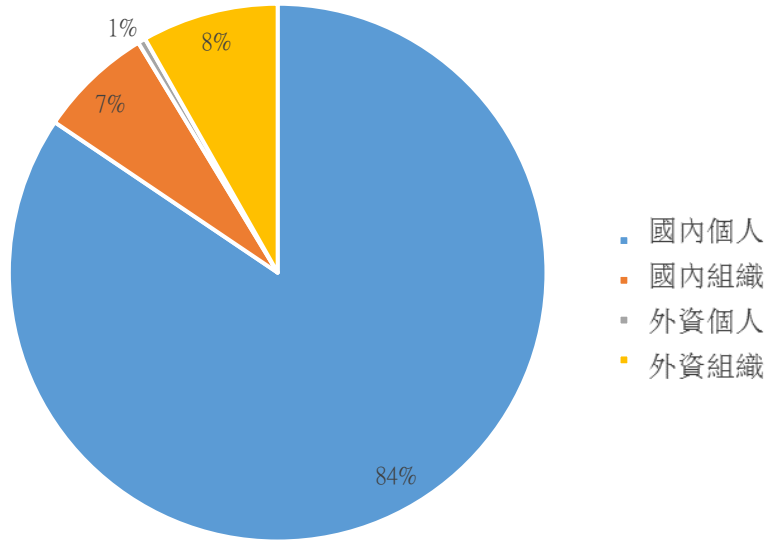
UPCoM 自營交易每日買/賣超 (BiVND)





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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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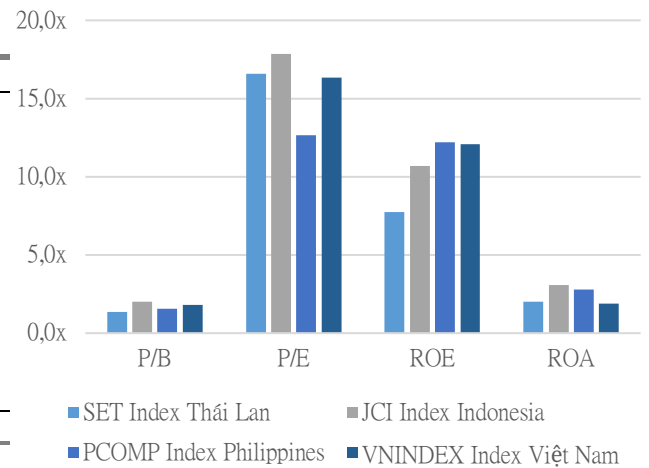
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.6x	1.8x
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







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