

## 當日市場：指數在窄幅波動

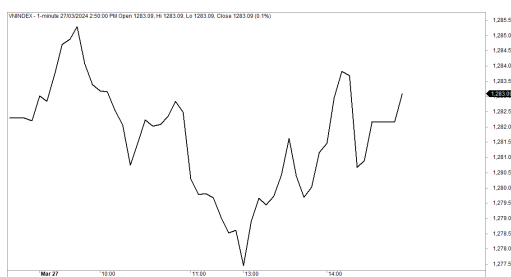
2024/03/28

### 市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,283.09	242.85	91.18
%日	0.07%	0.34%	-0.03%
%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	24,022	1,799	759
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	3,199.83	23.54	40.77
賣出	5,162.18	27.53	21.66
買賣超	-1,962.34	-3.99	19.11
<b>市場漲跌家數</b>			
上漲	198	103	193
下跌	124	64	120
持平	97	158	590
<b>市場指標</b>			
P/E	14.84	19.83	17.73
總市值 (兆盾)	5,206	325	1,186
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

### VNINDEX



### HNIINDEX



### 市場走勢

大多數指數延續漲幅至第二個交易日，儘管各類股票之間出現分化較多，但漲幅並不算太強。VN-Index 收盤上漲 0.07% 至 1,283.09 點，HNX-Index 上漲 0.34%，Upcom-Index 下跌 0.03%。3 大市場的交易額達 26 兆 800 億越南盾。

VN30-Index 的漲幅強於主要指數，則上漲 0.2%，其中有 13 檔上漲股、11 檔下跌股和 6 檔參考股。GVR (-1.47%)、VRE (-1.7%) 是當日錄得跌幅較大的兩檔大型股。相反，MSN (1.89%) 在連續 3 個交易日下跌後首次出現復甦階段。同時，MWG (4.21%) 大幅上漲，並收於 50,700 越南盾/股。此外，SAB (1.05%)、SSI (1.32%)、VJC (1.08%) 也復甦相當良好。

現金流強勁流入一些股票，如 NVL (1.4%)、HSG (2.55%)、DIG (2.5%)、DXG (2.27%) 等也是市場交易量領先的股票。

外資在連續第 12 個交易日在 3 大市場賣超 1 兆 9,490 億越南盾，主要集中在 MSN (1 兆 780 億)、VIX (1,780 億)、VHM (1,350 億) 被拋售最多的股票。相反，VSC (460 億)、HSG (330 億)、MWG (300 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繼續上漲，VN-Index 可能會回歸 1,291 點。同時，市場有進入積極劇烈波動期的跡象，因此短期趨勢可能會轉為更加明顯。目前的負面點是流動性走弱，顯示投資者再次轉為謹慎態度，但現金流仍然沒有出現退出和在各類股票之間分化的跡象。

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維持投資組合中較高比例的股票，並在調整期買進新股。

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	1283.09	0.07%
VN30	1288.77	0.20%
VN Mid	1939.39	0.26%
VN Small	1526.77	0.86%

河內交易所 (HSX)

	收盤	漲跌%
HNI	242.85	0.34%
HN30	535.69	0.54%
VNX AllSh	1307.15	0.26%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	91.18	-0.03%

外資交易	成交值 (BiL.VND)
買進	3199.83384
賣出	5162.17827
買超/賣超	-1962.34442

外資交易	成交值 (BiL.VND)
買進	23.54
賣出	27.53
買超/賣超	-3.99

外資交易	成交值 (BiL.VND)
買進	40.77
賣出	21.66
買超/賣超	19.11

上漲排名/股碼	漲跌(VND)	漲跌%
VRC	800	6.96%
QCG	800	6.87%
CSV	3900	6.84%
VSC	1500	6.80%
CTR	7700	5.70%

上漲排名/股碼	漲跌(VND)	漲跌%
HMR	1700	9.60%
VTV	600	9.38%
TMB	5400	8.79%
HVT	3900	6.08%
DXP	800	5.84%

上漲排名/股碼	漲跌(VND)	漲跌%
HHG	17028673	10.15%
VGI	0	6.73%
DRI	36532422	5.48%
VHG	72820529	3.81%
AAS	227704632	3.37%

下跌排名/股碼	漲跌(VND)	漲跌%
NOI	-550	-6.49%
AGM	-310	-4.25%
CNG	-1000	-2.83%
EVF	-300	-1.76%
VRE	-450	-1.70%

下跌排名/股碼	漲跌(VND)	漲跌%
AMV	-100	-2.44%
VFS	-300	-1.50%
APS	-100	-1.47%
VIG	-100	-1.14%
NVB	-100	-0.93%

下跌排名/股碼	漲跌(VND)	漲跌%
DHB	-710	-5.22%
DDV	-722	-4.35%
HSV	-322	-4.18%
VNB	-297	-2.14%
VEF	-3929	-1.82%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	BiL.VND
VCB	535,434,943
BID	299,272,885
CTG	190,634,707
VHM	185,060,618
GAS	184,428,210

市值排名/股碼	BiL.VND
IDC	19,403,996
PVS	18,736,279
HUT	17,225,481
SHS	16,669,713
THD	13,513,499

市值排名/股碼	BiL.VND
ACV	183,534,337
VGI	118,580,797
MCH	90,484,110
BSR	59,926,457
VEA	49,996,100

交易量排名/股碼	成交值	30 日均
MSN	45,684,106	7,328,572
NVL	43,775,700	29,898,480
VND	37,024,300	40,523,479
VIX	35,462,600	37,512,744
HSG	27,369,300	13,403,621

交易量排名/股碼	成交值	30 日均
SHS	16,856,877	33,002,129
CEO	13,486,089	15,937,997
PVS	7,117,774	8,223,962
HUT	5,341,172	5,312,817
TNG	4,366,960	2,555,963

交易量排名/股碼	成交值	30 日均
AAS	4,732,663	2,191,012
BSR	4,566,904	6,459,961
VGI	3,890,493	1,838,973
DDV	3,524,719	2,558,491
HHG	3,367,420	597,571

資料源: Bloomberg & Yuanta Research

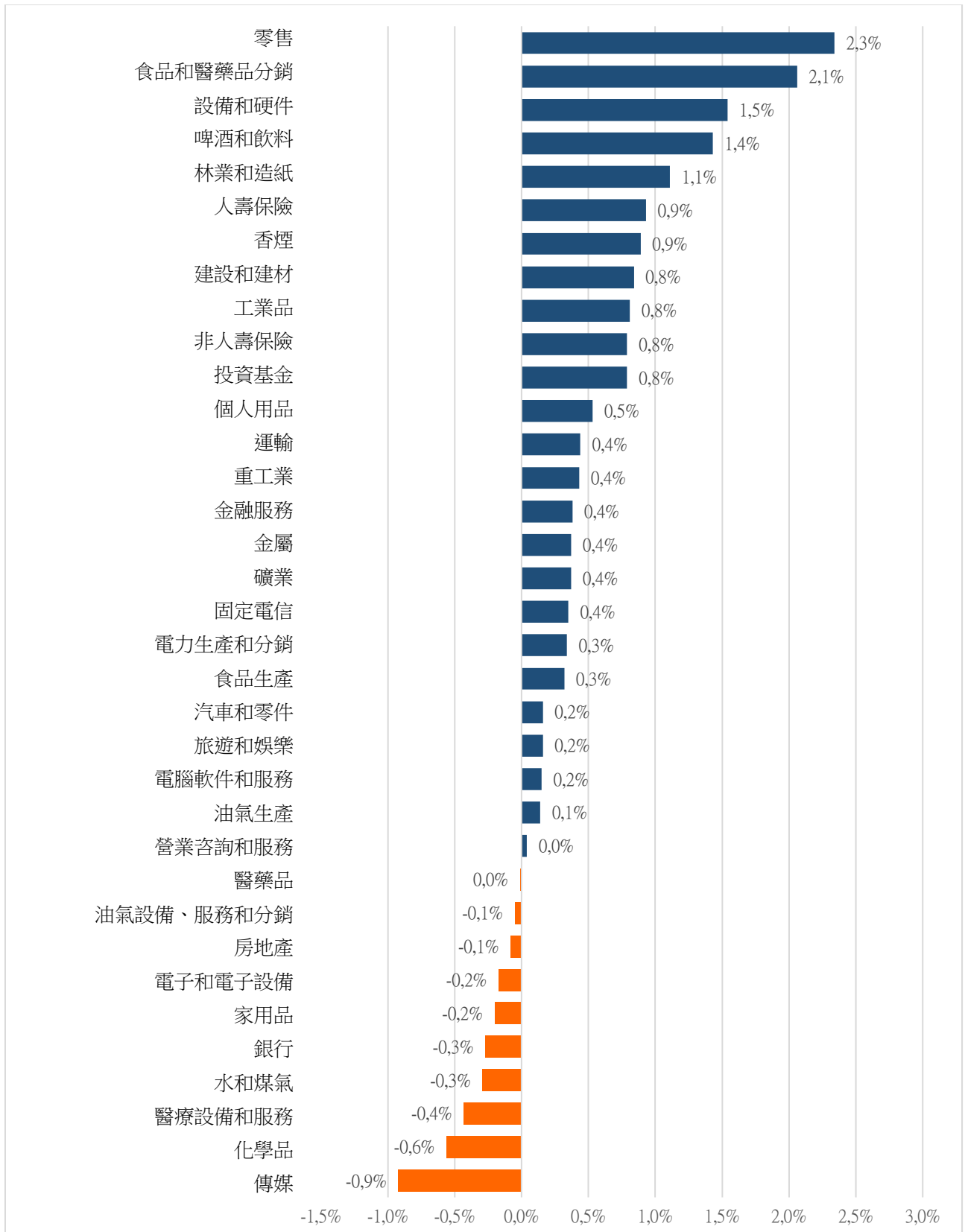
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢

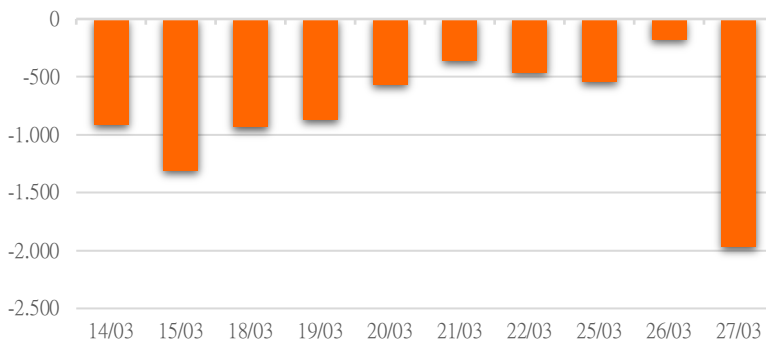


資料源: FimPro - YSVN

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## 外資買進賣統計

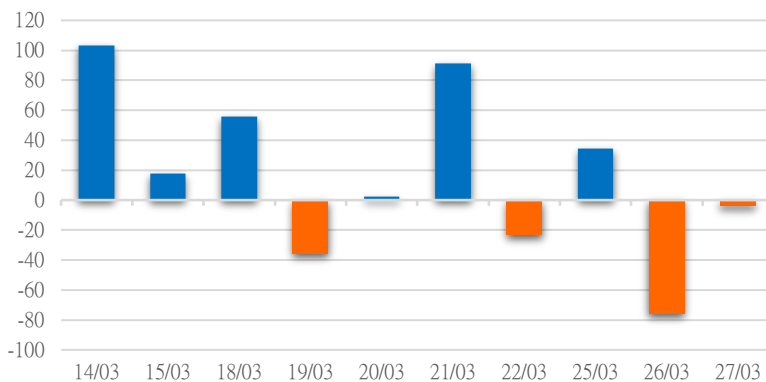
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VSC	45,332	MSN	-1,078,197
HSG	32,642	VIX	-177,255
MWG	29,482	VHM	-135,078
TPB	17,923	GEX	-118,833
DBD	17,582	VNM	-71,896

HSX 外資買/賣超的前 5 名

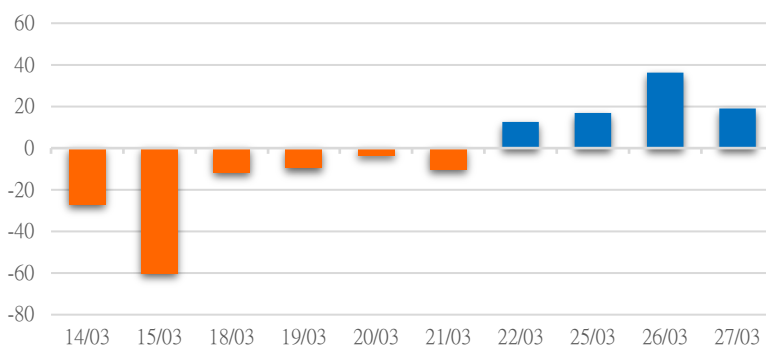
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TNG	6,659	CEO	-8,452
TIG	5,191	SHS	-7,027
HUT	3,249	L14	-2,148
PVI	1,230	VC7	-1,494
MST	562	PLC	-887

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	9,152	NTC	-2,012
QNS	5,151	BSR	-1,986
VEA	4,256	MCH	-265
VGT	2,988	VGI	-162
AAS	937	FOC	-156

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	202,056	FPT	37,222
FUEVFNVD	24,567	HPG	31,034
FUESSVFL	15,311	VPB	27,378
KOS	11,438	TCB	25,397
E1VFN30	9,533	MBB	21,063

HSX 自營交易最大前名

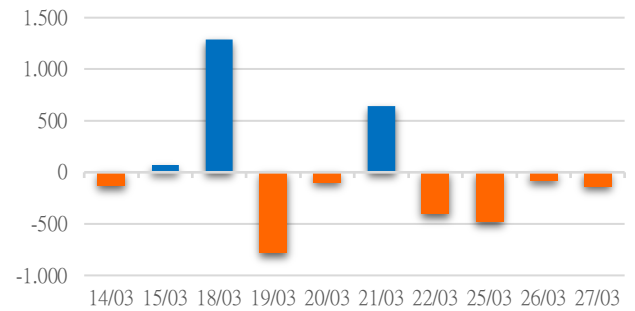
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	170	GKM	33,198
		PVS	6,874
		HTP	4,550
		CEO	7
		DTD	3

HNX 自營交易最大前名

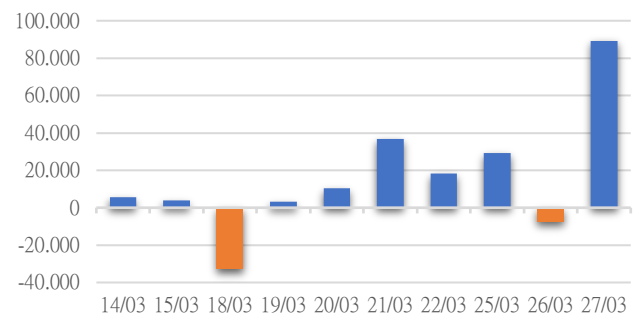
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
		BSR	4,855

UPCoM 自營交易最大前名

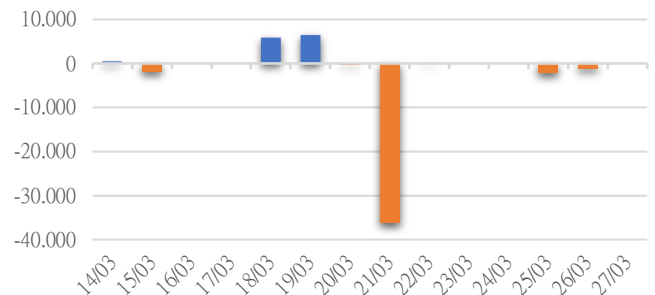
HSX 自營交易每日買/賣超 (BilVND)



HNX 自營交易每日買/賣超 (BilVND)



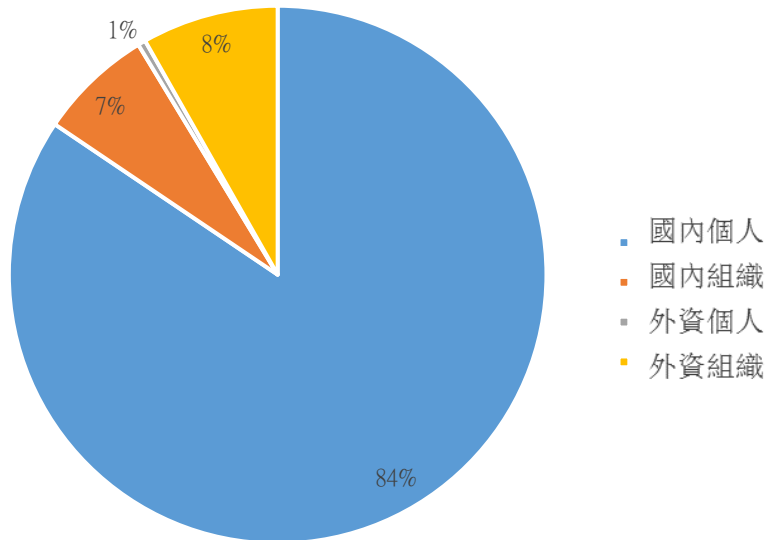
UPCoM 自營交易每日買/賣超 (BilVND)





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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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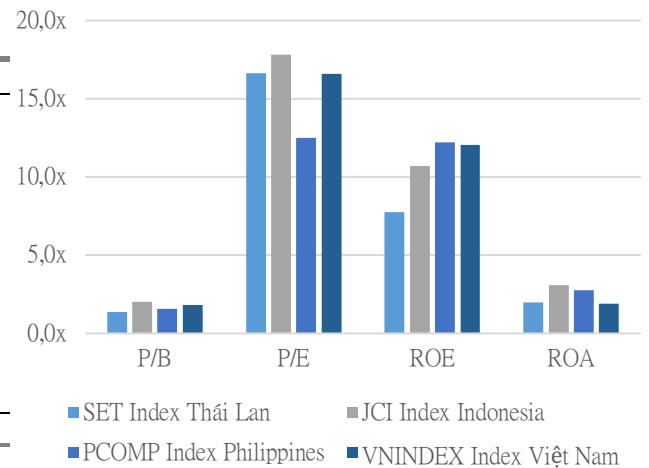
### 東南亞主要市場走勢比較



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	12.5x	16.6x
ROE	%	7.76	10.71	12.21	12.04
ROA	%	2.00	3.07	2.78	1.89
Vốn hóa	Tỷ USD	465.98	746.03	168.76	210.85
GTGD	Triệu USD	0.99	0.57	0.09	0.80
LS cổ tức	%	3.29	3.79	2.55	1.59

源：BloomBerg & YSVN



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





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