

當日市場：大型股引領市場復甦

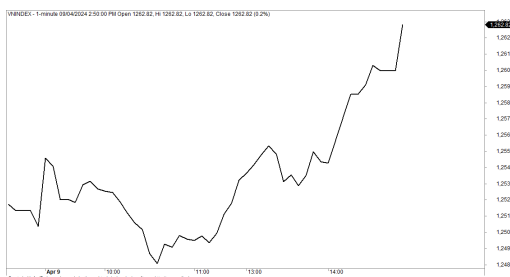
2024/04/10

市場走勢

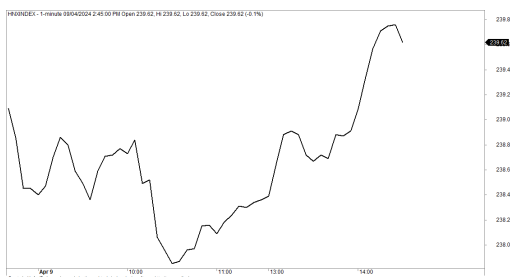
市場指數	VNI	HNI	UPCOM
收盤	1,262.82	240.36	90.57
%日	1.00%	0.96%	0.05%
%週	-1.88%	-2.25%	-0.91%
%月	1.24%	1.71%	-0.72%
%年	18.05%	13.59%	15.88%
成交值(Bil.VND)			
當日	17,112	1,643	667
日均量/週	22,768	2,370	878
日均量/月	25,758	2,378	727
外資進出			
買進	1,807.07	58.45	9.93
賣出	1,533.65	21.38	24.05
買賣超	273.42	37.07	-14.12
市場漲跌家數			
上漲	230	111	137
下跌	102	65	174
持平	87	149	592
市場指標			
P/E	14.72	19.98	20.31
總市值 (兆盾)	5,126	323	1,217
股息殖利率	0.00%	0.00%	0.00%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

由於大型股的積極走勢，市場錄得復甦階段。VN-Index 收漲 1% 至 1,262.82 點，HNX-Index 上漲 0.96%，Upcom-Index 上漲 0.05%。3 大市場的交易額持續下降，並達到 19 兆 4,220 億越南盾。

大型股表現較為積極，其中 MWG (5.6%)、MSN (2.23%)、VRE (2.54%)、GVR (1.89%) 是當日的亮點。此外，由於 LPB 漲停，銀行股持續良好，而 MBB (2.13%)、CTG (2.24%)、TPB (1.92%)、VIB (1.54%)、BID (3.74%) 上漲。證券、房地產和鋼鐵股也同步上漲，其中 SSI、VIX、VND、HCM、DIG、DXG、KBC、NKG 均上漲 2% 以上。

抄底現金流也較為積極參與中小型股，幫助 POM 和 SCD 漲停，而 VTP (4.88%) 再次上漲。

外資在 3 大市場再次買超 2,920 億越南盾，其中 MWG (2,740 億)、SBT (570 億)、BID (480 億) 在買超方面領先。相反，VHM (1,330 億)、FUSSVFL (1,120 億)、VNM (660 億) 被拋售最多的股票。

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 可能會重新測試 1,270 點的阻力位。同時，市場仍處於短期調整階段，因此市場可能會在流動性較低的情況下出現技術性復甦階段，這也顯示短期需求對目前市場走勢仍持謹慎態度，市場也可能會快速結束短期復甦期。另外，短期風險依然較高，因此我們不建議在此期間買進新股，投資者仍應關注 VN-Index 的 1,230-1,235 點和 1,200-1,210 點等兩個重要支撐位的市場走勢。

大盤的短期走勢仍維持下跌。因此，我們建議短期投資者可以繼續利用復甦期降低股票比例，並在此期間限制新買。

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	下跌	上漲	1300	1330	870	800
HNX-Index	下跌	上漲	260	306	189	160
VN30	下跌	上漲	1300	1336	980	960
VNMidcaps	下跌	上漲	1280	1250	963	900
VNSmallcaps	下跌	上漲	1250	1250	804	750

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1262.82	1.00%
VN30	1266.92	0.97%
VN Mid	1905.7	1.83%
VN Small	1478.9	0.76%

河內交易所 (HSX)

	收盤	漲跌%
HNI	240.36	0.96%
HN30	533.93	1.81%
VNX AllSh	1283.59	1.20%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	90.57	0.05%

外資交易	成交值 (BiL.VND)
買進	1807.06595
賣出	1533.64871
買超/賣超	273.417233

外資交易	成交值 (BiL.VND)
買進	58.45
賣出	21.38
買超/賣超	37.07

外資交易	成交值 (BiL.VND)
買進	9.93
賣出	24.05
買超/賣超	-14.12

上漲排名/股碼	漲跌(VND)	漲跌%
LPB	1200	6.92%
QCG	850	6.91%
POM	260	6.90%
CMG	2950	6.55%
VDS	1250	6.08%

上漲排名/股碼	漲跌(VND)	漲跌%
HMR	2000	9.76%
CAP	5900	9.75%
DVM	1100	9.73%
BVS	3100	8.88%
C69	500	7.25%

上漲排名/股碼	漲跌(VND)	漲跌%
VFC	1465237	13.19%
POS	19435900	12.76%
BDT	18907000	10.69%
HIO	10499400	4.21%
SCL	0	3.05%

下跌排名/股碼	漲跌(VND)	漲跌%
VNE	-310	-5.74%
MHC	-550	-5.53%
PSH	-310	-4.70%
NO1	-300	-3.95%
FIR	-250	-2.75%

下跌排名/股碼	漲跌(VND)	漲跌%
S99	-1300	-9.56%
IVS	-400	-2.94%
SRA	-100	-2.86%
AMV	-100	-2.78%
BNA	-300	-2.68%

下跌排名/股碼	漲跌(VND)	漲跌%
GSM	-2600	-11.93%
CEN	-419	-11.32%
VGI	-2635	-5.17%
BIG	-381	-3.56%
PXL	-446	-3.21%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	BiL.VND
VCB	527,051,306
BID	300,412,972
VHM	188,108,675
CTG	183,922,217
GAS	183,509,514

市值排名/股碼	BiL.VND
PVS	20,265,771
IDC	19,172,996
HUT	16,689,974
SHS	16,425,766
THD	13,436,499

市值排名/股碼	BiL.VND
ACV	183,288,342
VGI	147,213,929
MCH	96,064,881
BSR	61,374,390
VEA	49,048,666

交易量排名/股碼	成交值	30 日均
NVL	38,217,900	38,687,393
VIB	31,132,900	9,139,609
VIX	27,604,300	37,225,144
MWG	21,005,300	12,718,062
STB	17,970,600	27,133,396

交易量排名/股碼	成交值	30 日均
SHS	21,122,622	30,053,094
PVS	6,126,690	9,505,541
CEO	5,912,136	16,190,270
PVC	4,318,876	2,914,737
HUT	3,790,160	5,240,711

交易量排名/股碼	成交值	30 日均
BSR	8,034,839	7,230,759
AAH	6,236,500	1,513,410
VGI	2,280,507	2,158,885
DDV	1,778,297	2,892,418
CEN	1,628,829	408,913

資料源: Bloomberg & Yuanta Research

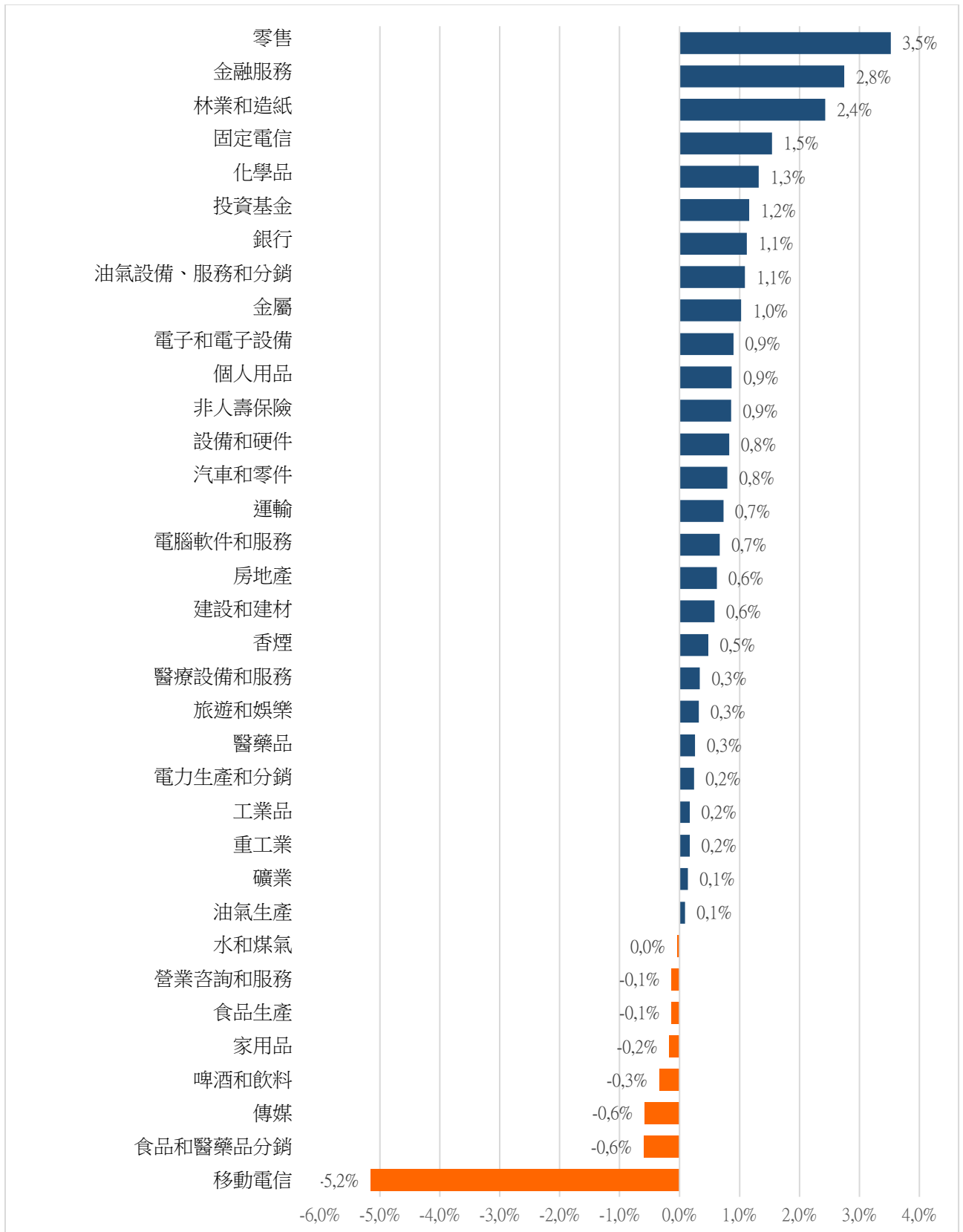
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



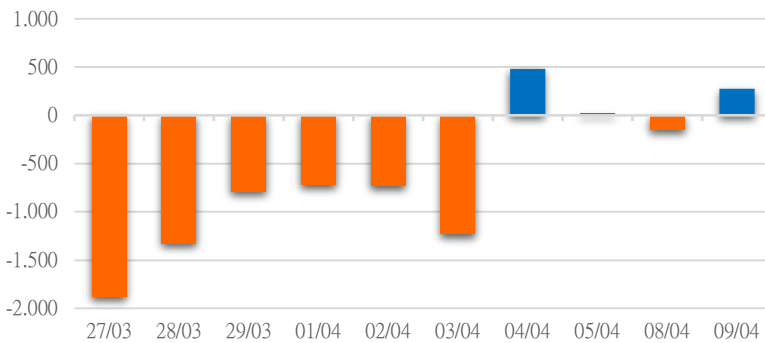
資料源: FiinPro - YSVN



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外資買進賣統計

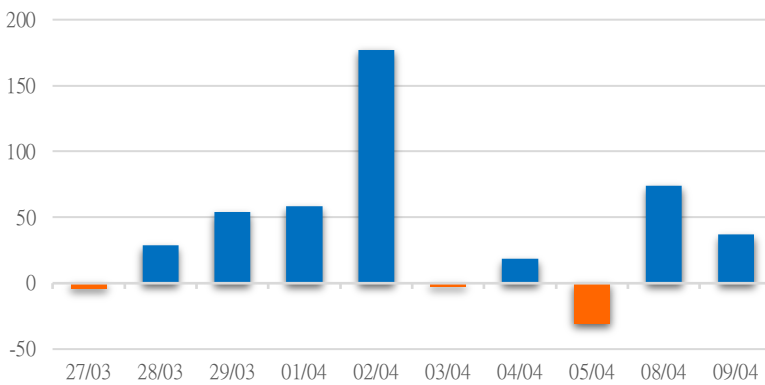
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MWG	276,119	VHM	-132,730
SBT	56,519	FUESSVFL	-112,416
BID	48,295	VNM	-65,882
MSN	46,807	DBC	-56,823
HPG	44,354	FUEVFNVD	-34,620

HSX 外資買/賣超的前 5 名

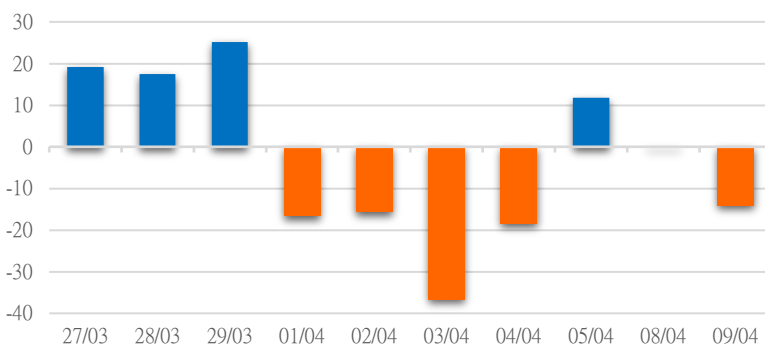
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	15,469	TVC	-816
SHS	7,474	IDC	-491
BVS	5,868	TA9	-355
CEO	3,369	NVB	-204
NBC	1,165	MCO	-145

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)
ACV	3,804	BSR	-18,610
VEA	371	MSR	-325
QNS	246	GDA	-117
GHC	231	FOC	-78
BLI	158	CLX	-73

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)
FUESSVFL	105,877	MWG	83,525
PC1	28,115	STB	32,395
ASM	18,817	MSN	27,732
VHM	17,197	CTR	27,263
PTB	8,103	BID	25,778

HSX 自營交易最大前名

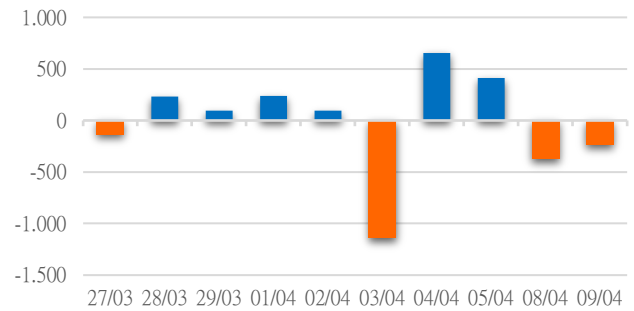
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	5,498	IDC	12,739

HNX 自營交易最大前名

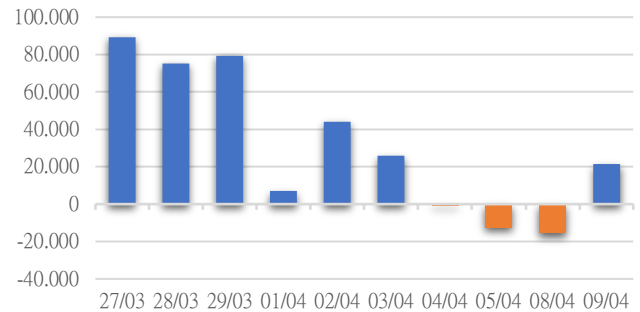
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
ACV	844.91	MCH	2,621
BSR	396.00		
VEA	370.75		

UPCoM 自營交易最大前名

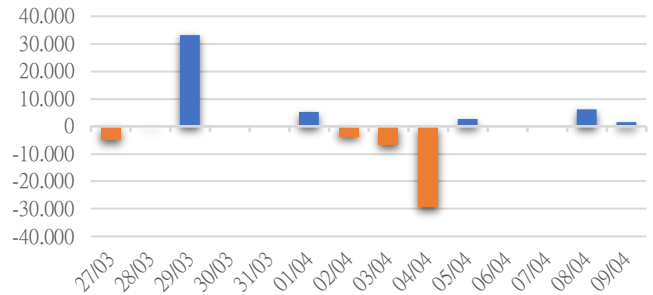
HSX 自營交易每日買/賣超 (BilVND)



HNX 自營交易每日買/賣超 (BilVND)



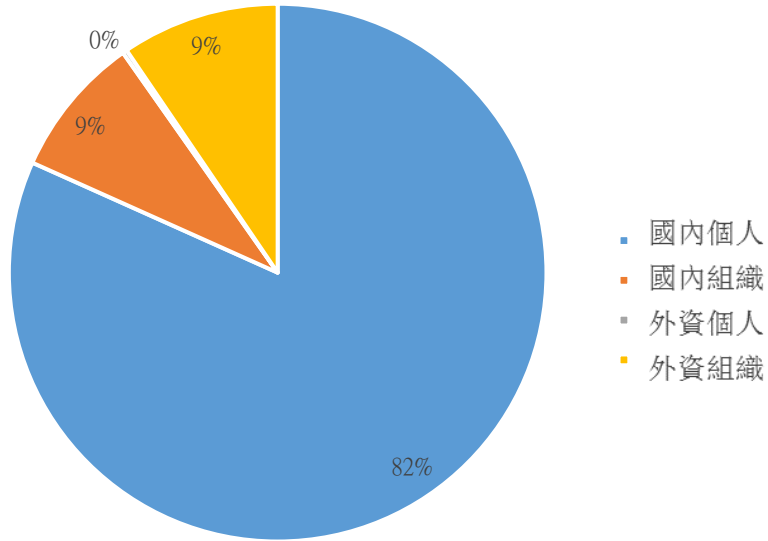
UPCoM 自營交易每日買/賣超 (BilVND)





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越南證券市場投資人類別統計

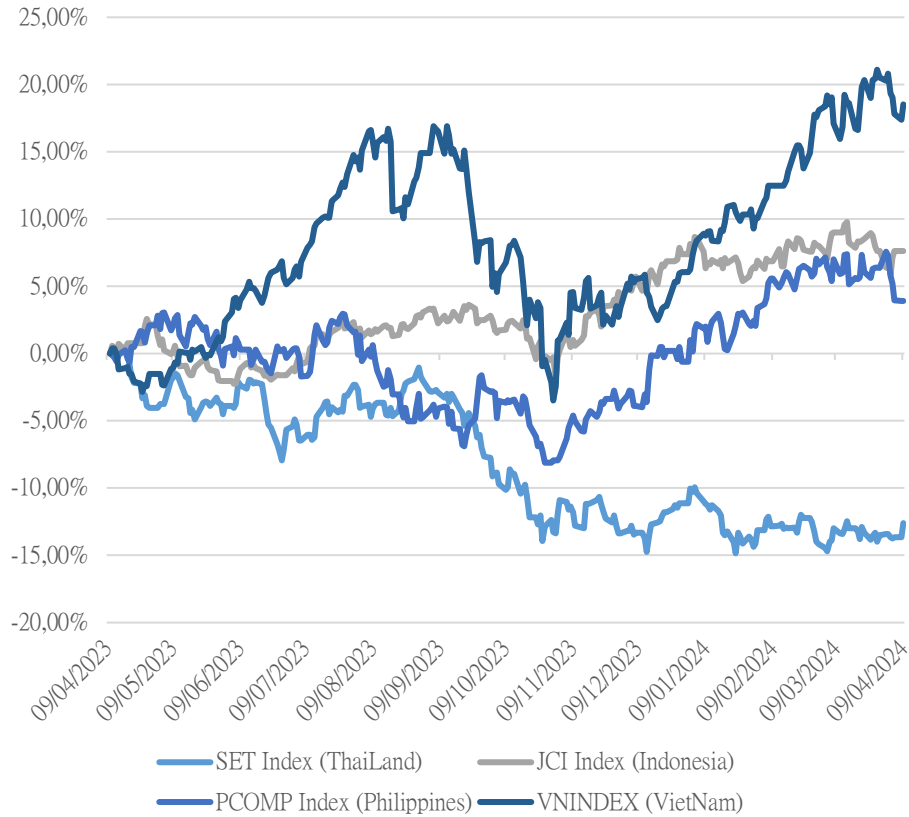


資料源: FiinPro - YSVN



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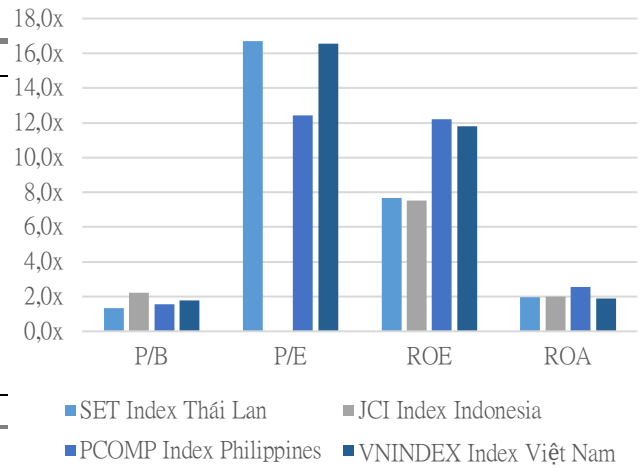
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.2x	1.6x	1.8x
P/E		16.7x	#N/A N/A	12.4x	16.6x
ROE	%	7.69	7.54	12.22	11.80
ROA	%	1.98	2.01	2.57	1.89
Vốn hóa	Tỷ USD	465.68	751.45	163.90	204.17
GTGD	Triệu USD	0.67	0.47	0.06	0.74
LS cổ tức	%	3.25	3.75	2.59	1.55

源: Bloomberg & YSVN





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