

當日市場：拋售壓力占主導地位

2024/06/25

市場走勢

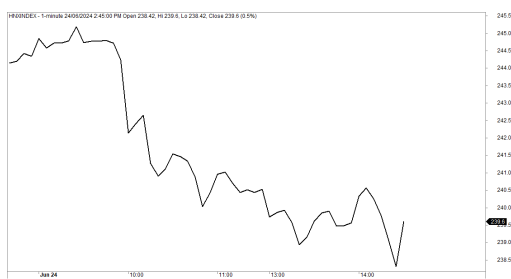
市場指數	VNI	HNI	UPCOM
收盤	1,254.12	239.74	99.06
%日	-2.18%	-1.89%	-1.51%
%週	-1.62%	-1.41%	0.99%
%月	-0.62%	-0.82%	4.94%
%年	11.04%	3.54%	15.58%
<b>成交值(Bil.VND)</b>			
當日	31,773	2,482	2,512
日均量/週	25,088	1,623	1,896
日均量/月	23,540	1,747	1,656
<b>外資進出</b>			
買進	2,453.37	99.64	69.72
賣出	3,383.94	76.36	69.50
買賣超	-930.57	23.28	0.22
<b>市場漲跌家數</b>			
上漲	66	65	161
下跌	288	139	209
持平	63	116	533
<b>市場指標</b>			
P/E	14.08	18.34	28.37
總市值 (兆盾)	5,130	338	1,702
股息殖利率	4.88%	2.95%	5.20%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

在匯率自 6 月中旬以來再次上漲的背景下，市場再次大幅下跌，VN-Index 錄得 4 月中旬以來的最大跌幅，跌幅為 2.18%，止於 1254.12 點，HNX-Index 下跌 1.89 點，Upcom-Index 下跌 1.51%。3 大市場的交易額均達到 36 兆 7,670 億越南盾。

VN30-Index 收盤下跌 2.28%，其中有 28 檔下跌股和 1 檔上漲股。VPB、BCM、GVR、HDB、MSN、PLX、STB、SSB、TPB、VPB 下跌超過 3%。相反，POW (2.04%)、SAB (0%) 是兩檔逆市的藍籌股。

中小型房地產股的表现比大盤更為積極，如 DIG、DXG、PDR、KBC 上漲，尤其是 ITA 漲停。相反，HVN 與 VDS、CTS、TVS、PET、HHS 跌停。

外資持續賣超超過 9,010 億越南盾，其中 FPT (5,900 億)、NLG (640 億)、SSI (580 億) 被拋售最多的股票。相反，TCB (570 億)、POW (560 億)、VNM (460 億) 在買超方面領先。

市場短期觀點

我們認為市場可能會在下一個交易日出現復甦。不過，短期市場走勢轉為更加消極，儘管技術指標下跌至超賣區域附近，因此價格走勢圖在短期內可能會出現技術復甦階段。此外，短期情緒指標大幅下跌，並轉為悲觀狀態。

大盤的短期走勢從上漲轉為下跌。因此，我們建議短期投資者可以降低股票比例至均衡水平。

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	1336	1350	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	1254.12	-2.18%
VN30	1289.85	-2.28%
VN Mid	1932.67	-2.56%
VN Small	1513.18	-3.01%

河內交易所 (HSX)

	收盤	漲跌%
HNI	239.74	-1.89%
HN30	520.27	-3.12%
VNX AllSh	1305.74	-2.41%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	99.06	-1.51%

外資交易	成交值 (Bil.VND)
買進	2453.37432
賣出	3383.94469
買超/賣超	-930.570373

外資交易	成交值 (Bil.VND)
買進	99.64
賣出	76.36
買超/賣超	23.28

外資交易	成交值 (Bil.VND)
買進	69.72
賣出	69.50
買超/賣超	0.22

上漲排名/ 股碼	漲跌(VND)	漲跌%
HNG	340	6.97%
EVG	490	6.86%
ITA	360	6.86%
TDG	340	6.81%
KHP	700	6.70%

上漲排名/ 股碼	漲跌(VND)	漲跌%
VSA	3300	9.82%
VIF	1900	9.55%
SDA	500	8.20%
GKM	2900	8.06%
DL1	300	6.12%

上漲排名/ 股碼	漲跌(VND)	漲跌%
VLG	6927143	14.81%
EMS	0	14.73%
VNA	0	14.57%
TIS	90125280	11.52%
ABC	9808302	9.06%

下跌排名/ 股碼	漲跌(VND)	漲跌%
HVN	-2450	-6.97%
TVS	-1800	-6.95%
BSI	-3900	-6.93%
HTN	-900	-6.92%
CTS	-2950	-6.91%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ONE	-900	-10.00%
BVS	-4200	-9.27%
NTP	-5600	-9.00%
MBS	-3000	-8.65%
PVB	-2200	-7.33%

下跌排名/ 股碼	漲跌(VND)	漲跌%
PIV	-629	-11.65%
MFS	-8341	-11.38%
MVN	-6965	-9.73%
LIC	-2807	-8.80%
TEL	-1065	-6.53%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	477,867,303
BID	256,519,616
FPT	192,925,190
HPG	183,572,381
GAS	175,700,598

市值排名/ 股碼	Bil.VND
IDC	20,261,996
PVS	19,787,804
HUT	15,172,703
SHS	14,148,927
MBS	13,873,186

市值排名/ 股碼	Bil.VND
VGI	317,095,119
ACV	278,562,578
MCH	158,284,949
MVN	77,600,005
BSR	71,888,184

交易量排名/ 股碼	成交值	30 日均
VPB	51,572,402	35,026,808
SHB	39,470,004	27,830,854
HPG	38,366,667	26,171,009
LPB	35,971,982	37,169,770
VIX	33,192,500	20,411,594

交易量排名/ 股碼	成交值	30 日均
SHS	479,846,929,900	13,846,731
MBS	286,910,909,000	4,138,761
PVS	309,788,549,700	5,190,979
HUT	85,490,227,300	5,023,490
CEO	94,164,474,300	5,283,181

交易量排 名/股碼	成交值	30 日均
BSR	410,819,544,200	12,537,896
VAB	3,916,996,400	1,572,446
OIL	67,404,934,300	2,645,366
C4G	43,347,513,400	937,353
VGT	63,175,973,000	3,803,348

資料源: Bloomberg & Yuanta Research

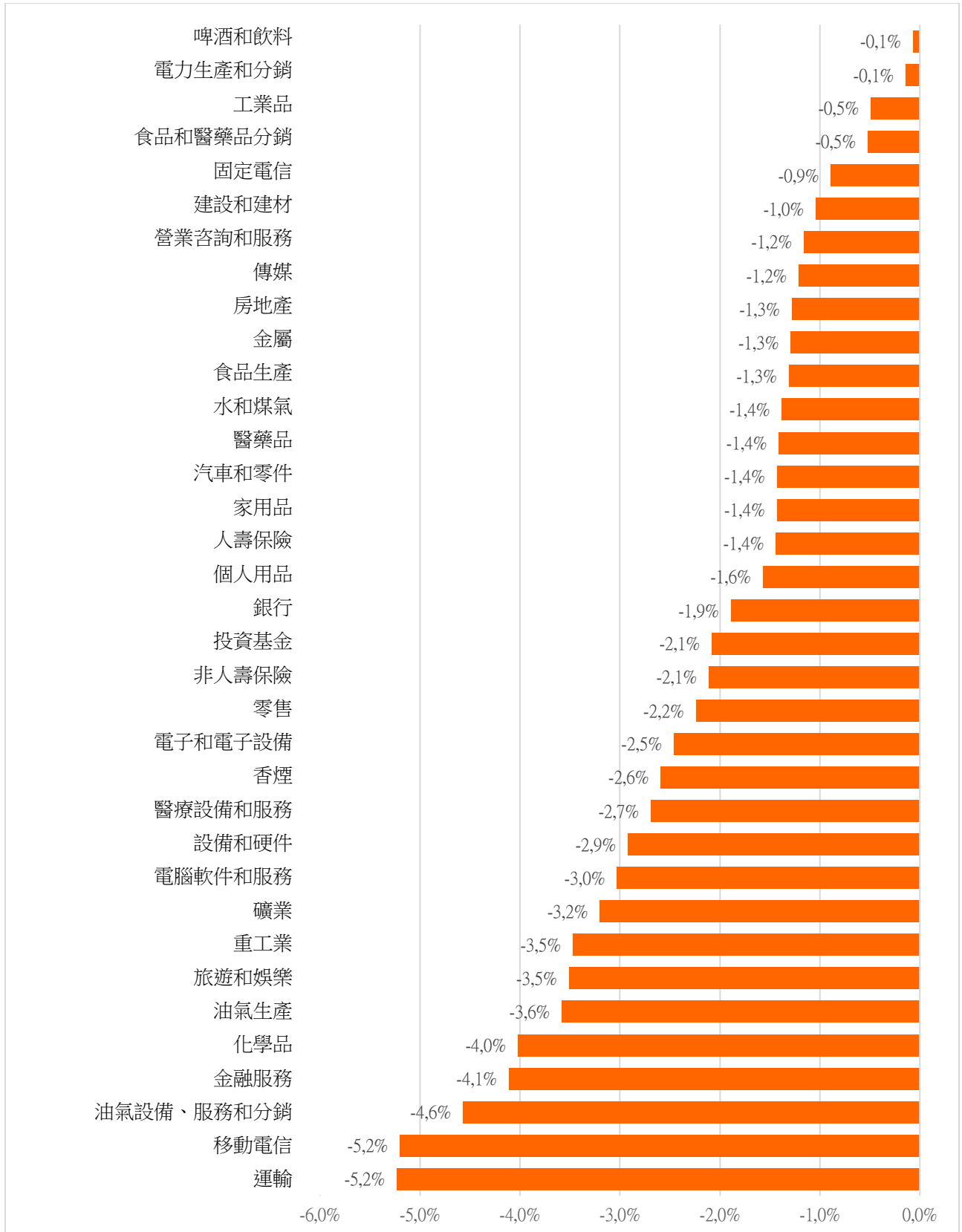
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢

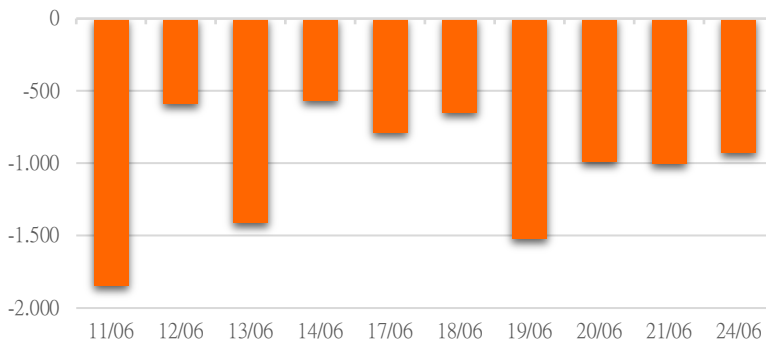


資料源: FiinPro - YSVN

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## 外資買進賣統計

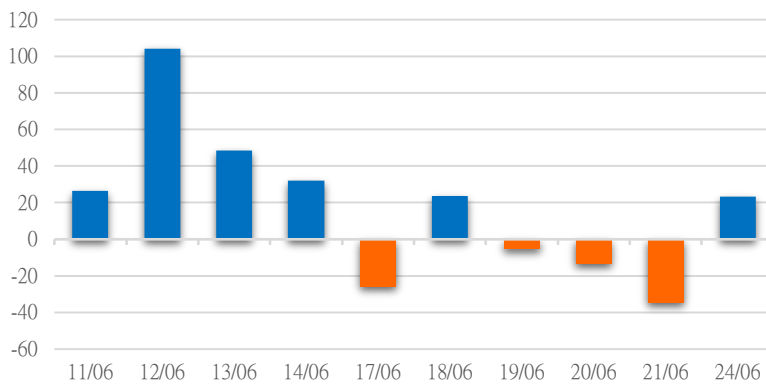
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TCB	56,998	FPT	-590,380
POW	55,457	NLG	-64,211
VNM	46,602	SSI	-57,904
SAB	40,431	HDB	-57,155
MSN	30,621	VRE	-55,817

HSX 外資買/賣超的前 5 名

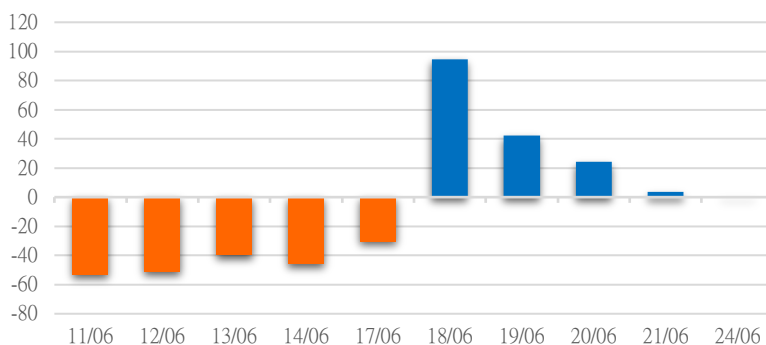
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	23,520	VCS	-5,088
PVS	15,725	NTP	-3,368
TVC	3,040	MBS	-2,178
BVS	2,425	LAS	-2,132
CEO	1,923	SHS	-2,082

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)
MCH	21,853	ACV	-11,284
OIL	945	LTG	-5,179
VGG	705	QNS	-3,148
BDT	503	ABI	-2,011
BSR	300	VLC	-1,400

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	114,745	MWG	109,163
STB	71,394	E1VFN30	88,125
FPT	64,871	ACB	67,697
MBB	51,289	SAB	30,858
TCB	38,315	FUEKIV30	26,224

HSX 自營交易最大前名

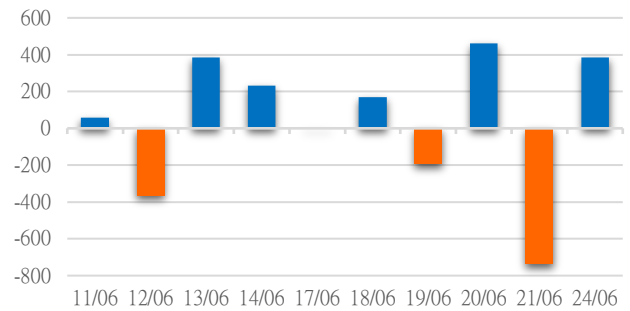
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	2,041	IDC	10,828
VCS	795	L18	118
HHC	128		

HNX 自營交易最大前名

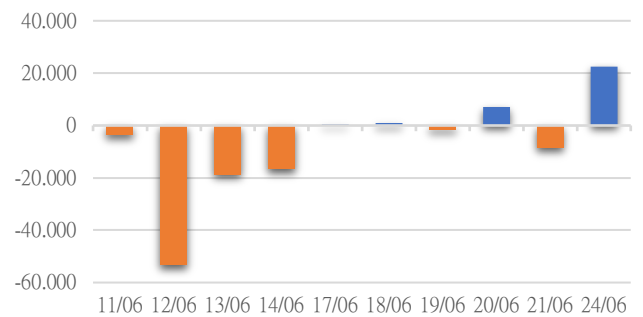
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DDV	3,093.00	GEE	99,000
BSR	1,150.00	QTP	3,616
		BCR	620

UPCoM 自營交易最大前名

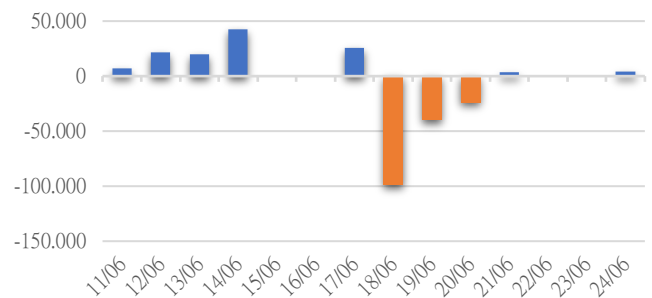
HSX 自營交易每日買/賣超 (BiVND)



HNX 自營交易每日買/賣超 (BiVND)



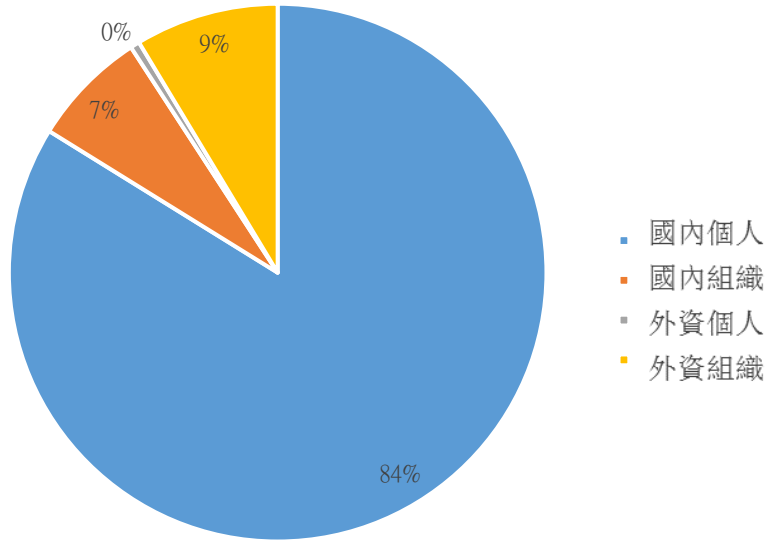
UPCoM 自營交易每日買/賣超 (BiVND)





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### 越南證券市場投資人類別統計

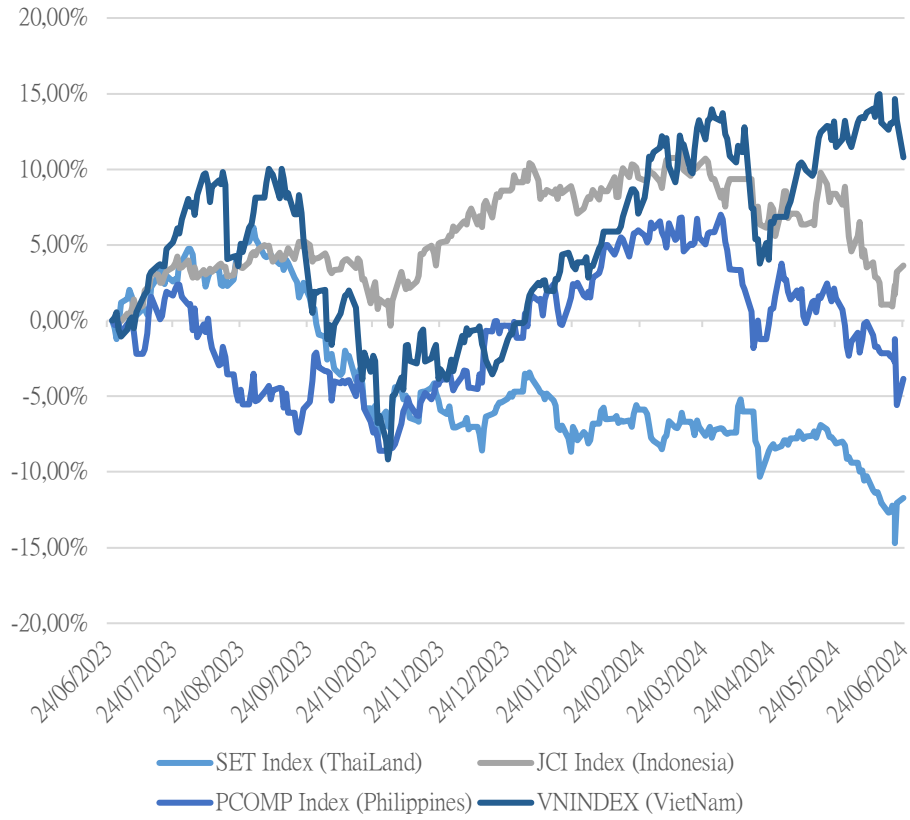


資料源: FiinPro - YSVN



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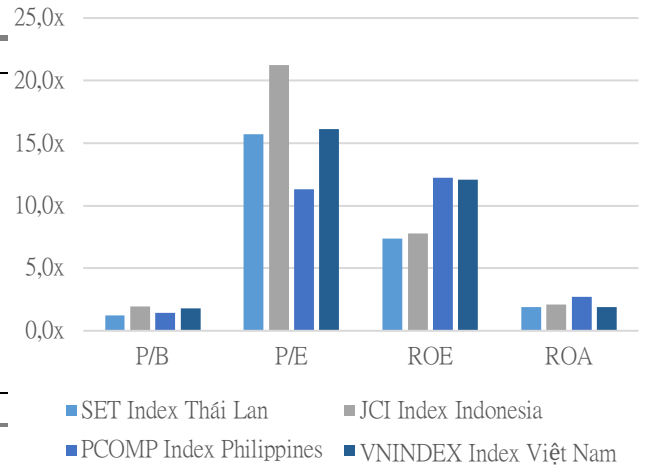
### 東南亞主要市場走勢比較



### 東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.2x	2.0x	1.4x	1.8x
P/E		15.7x	21.2x	11.3x	16.1x
ROE	%	7.37	7.78	12.21	12.09
ROA	%	1.91	2.08	2.71	1.92
Vốn hóa	Tỷ USD	439.88	716.19	145.31	205.74
GTGD	Triệu USD	1.45	0.98	0.12	0.73
LS cổ tức	%	3.59	3.46	2.91	1.68

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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