

當日市場：漲幅繼續維持

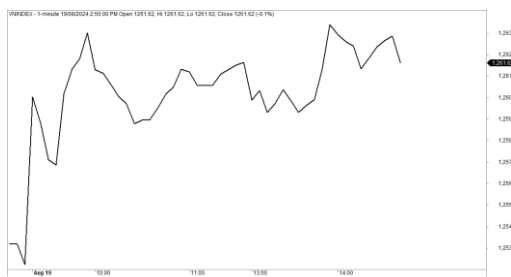
2024/08/20

市場走勢

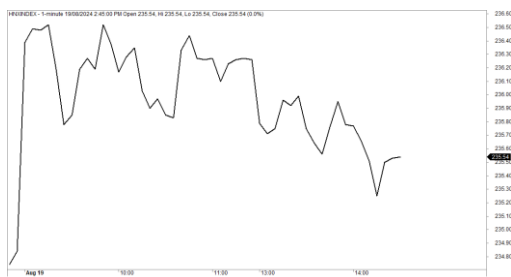
市場指數	VNI	HNI	UPCOM
收盤	1,261.62	236.01	93.72
%日	0.75%	0.37%	0.30%
%週	2.55%	2.27%	0.77%
%月	-0.25%	-1.88%	-3.16%
%年	7.10%	0.02%	4.98%
<b>成交值(Bil.VND)</b>			
當日	16,758	1,198	820
日均量/週	15,465	1,157	856
日均量/月	16,068	1,209	886
<b>外資進出</b>			
買進	1,182.86	39.90	42.41
賣出	1,494.20	68.61	10.48
買賣超	-311.34	-28.70	31.93
<b>市場漲跌家數</b>			
上漲	206	71	208
下跌	127	85	104
持平	86	161	591
<b>市場指標</b>			
P/E	13.68	16.53	22.90
總市值 (兆盾)	5,181	334	1,467
股息殖利率 <sup>2</sup>	1.83%	2.91%	3.86%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

由於世界市場的積極走勢，市場在連續第二個交易日延續上漲勢頭。 VN-Index 收盤上漲 0.75%，止於 1,261.62 點，HNX-Index 上漲 0.37%，Upcom-Index 上漲 0.3%。三大市場的交易額再次下降僅達到 18 兆 7,760 億越南盾。VN30-Index 持續上漲，但漲幅繼續走弱於主要指數。 VNM (2.98%)、TCB (2.1%)、GAS (2.3%)、VIB (1.65%)等是當日領漲的股票。相反，FPT (-0.08%)、HDB (-0.18%)、PLX (-0.4%)、SSI (-0.92%) 是逆市的藍籌股。

從行業板塊來看，鋼鐵板塊經過近 1 個月的調整後再度復甦。此外，房地產板塊也持續積極如 DXG (3.55%)、PDR (1.86%)、NVL (1.26%)、QCG (6.63%) 等。一些中型股也是亮點如 PNJ，HAX 漲停。

外資在連續第二個交易日賣超 3,090 億越南盾，其中 VHM (780 億)、HPG (720 億)、TCB (500 億) 在賣超方面的榜首。相反，VNM (1,370 億)、CTG (370 億)、GAS (370 億) 在買超方面領先。

市場短期觀點

我們認為市場可能會出現調整期，VN-Index 可能會在下一交易日測試 1,253 - 1,256 點的支撐位 (2024 年 8 月 19 日形成的上漲差距)。同時，市場出現進入積極劇烈波動期的階段，因此短期趨勢可能會在接下來的幾個交易日中轉為更加明顯。此外，情緒指標持續上漲，顯示投資者對當前市場走勢也更加樂觀，新的買進機會增加。

大盤的短期走勢仍維持上漲。因此，我們建議投資者可以繼續利用調整期增加股票比例並買進新股。

請在 <https://ysraar.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	中性	1300	1330	870	800
HNX-Index	上漲	中性	260	306	189	160
VN30	上漲	中性	1336	1350	980	960
VNMidcaps	上漲	中性	1280	1250	963	900
VNSmallcaps	上漲	中性	1250	1250	804	750

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1261.62	0.75%
VN30	1299.04	0.57%
VN Mid	1912.39	1.22%
VN Small	1439.33	0.48%

河內交易所 (HSX)

	收盤	漲跌%
HNI	236.01	0.37%
HN30	519.55	0.43%
VNX AllSh	1305.03	0.75%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	93.72	0.30%

外資交易	成交值 (Bil.VND)
買進	1182.86
賣出	1494.20
買超/賣超	-311.34

外資交易	成交值 (Bil.VND)
買進	39.90
賣出	68.61
買超/賣超	-28.70

外資交易	成交值 (Bil.VND)
買進	42.41
賣出	10.48
買超/賣超	31.93

上漲排名/ 股碼	漲跌(VND)	漲跌%
QCG	430	6.94%
PNJ	6800	6.93%
HAX	1100	6.88%
NHA	1550	6.37%
TTF	170	4.80%

上漲排名/ 股碼	漲跌(VND)	漲跌%
CTP	1300	10.00%
GKM	3200	9.67%
DL1	500	8.77%
KSV	1600	3.16%
NRC	100	2.78%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DFP	291	11.64%
PSB	854	10.81%
TVN	619	6.66%
LTG	935	6.15%
DRI	401	4.05%

下跌排名/ 股碼	漲跌(VND)	漲跌%
GEE	-1450	-3.88%
VRC	-270	-3.03%
HNG	-110	-2.51%
CSV	-850	-2.15%
DSE	-550	-2.14%

下跌排名/ 股碼	漲跌(VND)	漲跌%
CMS	-1200	-9.02%
MCO	-700	-7.22%
HMR	-600	-4.65%
API	-200	-2.63%
HKT	-200	-2.20%

下跌排名/ 股碼	漲跌(VND)	漲跌%
BLT	-778	-1.40%
SBB	-139	-0.92%
BCR	-41	-0.75%
PPH	-188	-0.63%
MCH	-972	-0.46%

\*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	492,398,940
BID	270,770,705
FPT	190,734,517
GAS	189,710,711
CTG	174,524,732

市值排名/ 股碼	Bil.VND
IDC	20,096,996
PVS	18,927,465
HUT	15,618,959
MBS	15,044,080
THD	13,667,499

市值排名/ 股碼	Bil.VND
VGI	202,681,300
MCH	152,760,144
BSR	73,894,207
VEA	56,641,429
MVN	49,478,633

交易量排名/ 股碼	成交值	30 日均
SHB	28,429,702	20,185,876
VIX	25,166,700	23,515,161
SSI	24,891,329	13,541,394
HPG	24,830,544	20,573,603
EIB	21,565,900	11,081,671

交易量排名/ 股碼	成交值	30 日均
SHS	151,168,117,500	10,420,774
CEO	112,993,436,200	4,727,277
DL1	14,237,919,800	1,334,714
PVS	113,688,548,600	2,729,351
MBS	64,391,464,100	3,965,536

交易量排 名/股碼	成交值	30 日均
BSR	237,560,511,500	9,465,656
BCR	17,977,144,200	2,119,112
DFP	7,909,783,800	324,576
OIL	34,749,594,400	2,669,940
VEA	100,737,587,900	1,107,095

資料源: Bloomberg & Yuanta Research

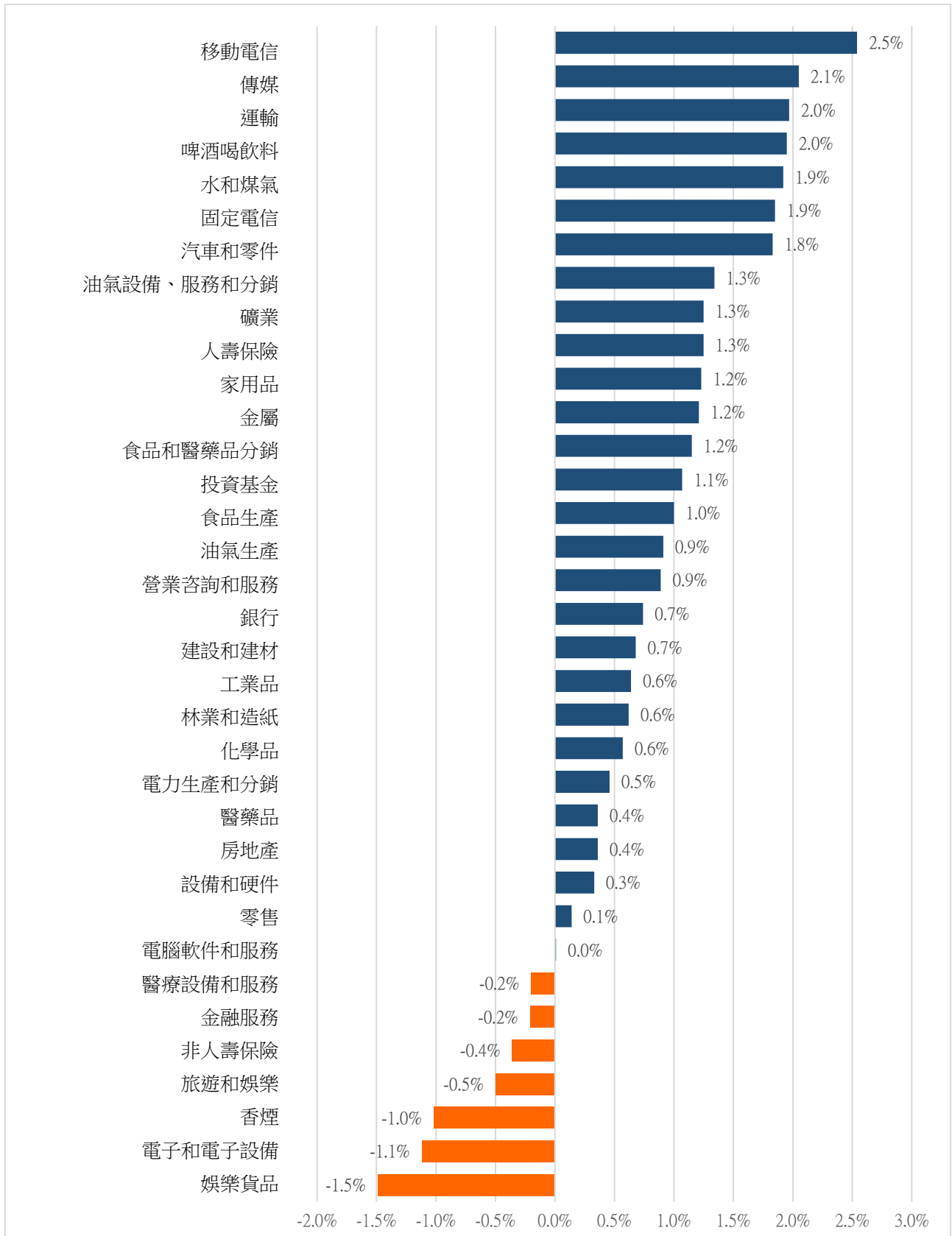
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



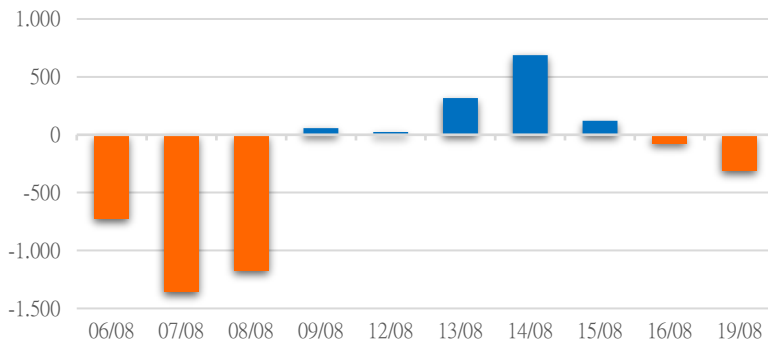
資料源: FimPro - YSVN



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## 外資買進賣統計

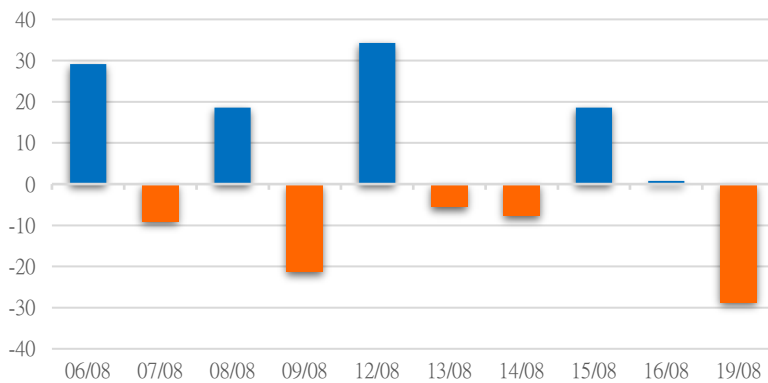
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VNM	137,512	VHM	-78,017
CTG	36,884	HPG	-72,217
GAS	36,740	TCB	-50,004
PC1	20,661	HSG	-42,694
STB	20,047	HDB	-33,491

HSX 外資買/賣超的前 5 名

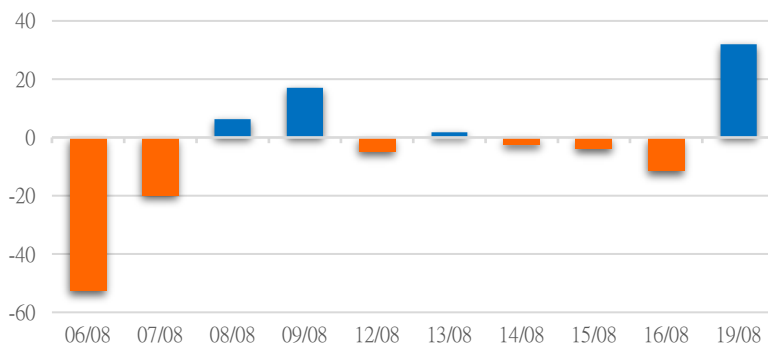
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVI	10,427	IDC	-26,768
PVS	3,629	NTP	-10,849
VGS	2,821	TNG	-4,593
VFS	1,423	DTD	-4,410
VIG	462	MBS	-1,020

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)
VEA	9,028	QNS	-2,405
MCH	6,345	VAB	-460
LTG	1,946	TED	-300
KLB	307	PAT	-179
MFS	296	UDC	-126

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

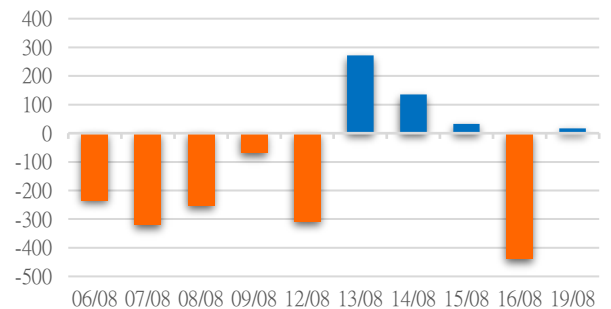
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## 自營統計

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VPB	19,723	PNJ	50,507
VHM	19,591	VNM	37,758
VIB	14,513	MBB	15,739
MSN	13,941	GAS	10,415
DPM	9,846	APH	9,468

HSX 自營交易最大前名

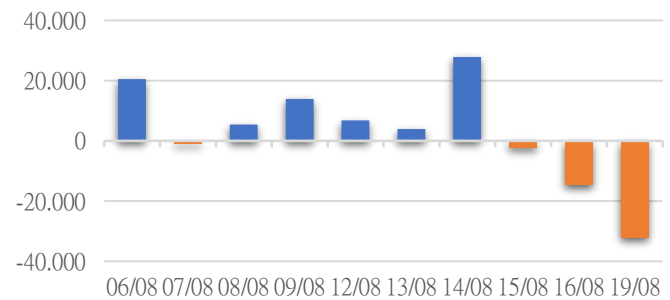
HSX 自營交易每日買/賣超  
(Bil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TNG	651	PVI	20,011
		PVS	7,921
		VCS	4,084
		MBS	552
		IDC	313

HNX 自營交易最大前名

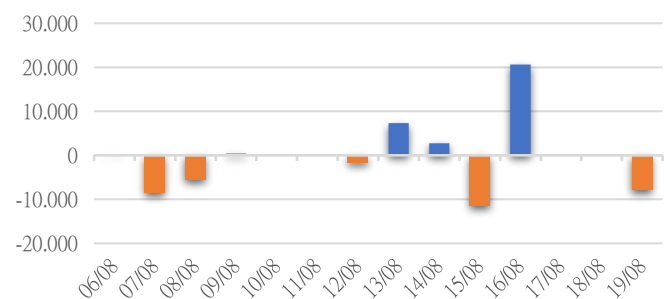
HNX 自營交易每日買/賣超  
(Mil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BSR	3,651.50	ACV	9,684
APF	1,338.46	MCH	3,374
FOX	189.40		

UPCoM 自營交易最大前名

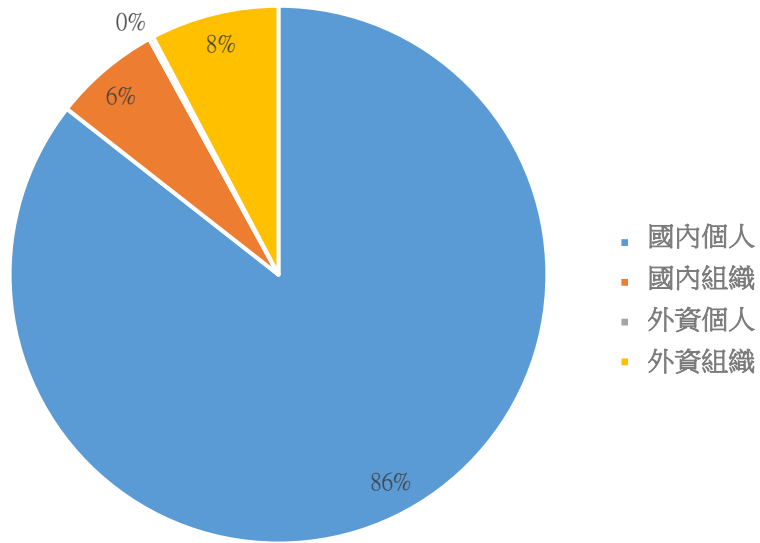
UPCoM 自營交易每日買/賣超  
(Mil.VND)





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### 越南證券市場投資人類別統計

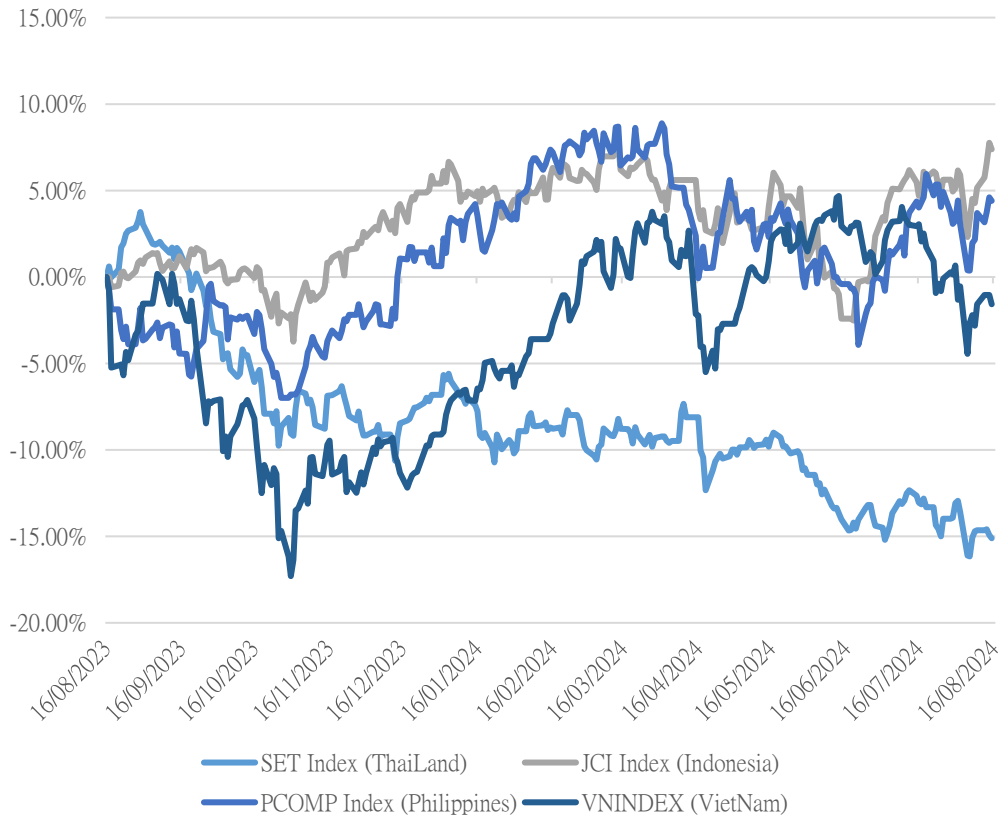


資料源: FiinPro - YSVN



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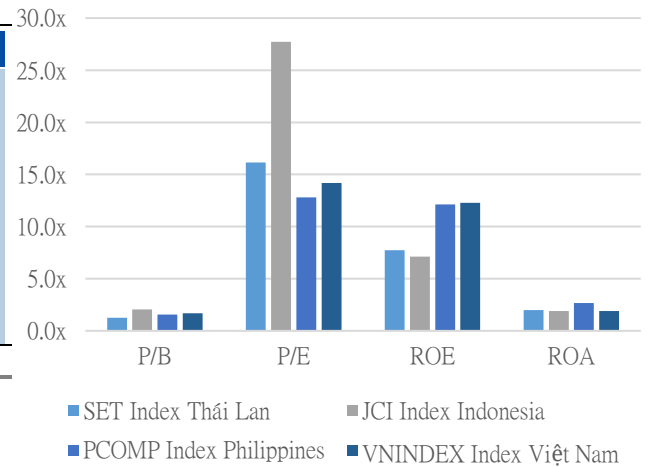
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.3x	2.1x	1.6x	1.7x
P/E		16.2x	27.7x	12.8x	14.2x
ROE	%	7.75	7.12	12.14	12.28
ROA	%	2.01	1.92	2.68	1.90
Vốn hóa	Tỷ USD	468.16	809.22	166.80	206.16
GTGD	Triệu USD	0.99	0.52	0.10	0.86
LS cổ tức	%	3.54	3.28	2.69	1.66

源：Bloomberg & YSVN



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





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## Appendix A: Important Disclosures

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