

當日市場：壯觀的上漲反轉交易日

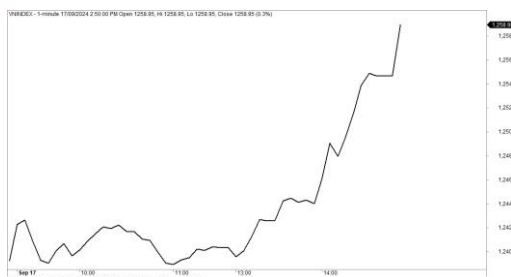
2024/09/18

市場走勢

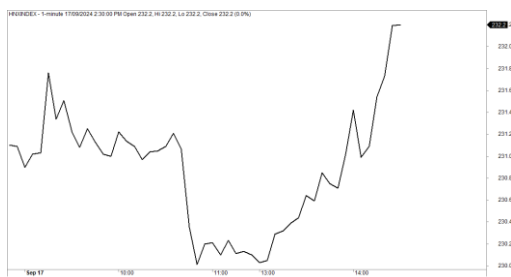
市場指數	VNI	HNI	UPCOM
收盤	1,258.95	232.30	93.12
%日	1.59%	0.63%	0.60%
%週	0.30%	0.26%	0.82%
%月	0.54%	-1.21%	-0.34%
%年	2.57%	-8.09%	-0.68%
成交值(Bil.VND)			
當日	13,508	1,067	539
日均量/週	12,283	890	481
日均量/月	15,169	1,069	604
外資進出			
買進	1,480.96	43.21	3.40
賣出	955.69	40.17	9.17
買賣超	525.27	3.04	-5.77
市場漲跌家數			
上漲	312	103	149
下跌	88	58	156
持平	70	153	598
市場指標			
P/E	13.63	16.14	27.09
總市值 (兆盾)	5,163	327	1,420
股息殖利 ²	2.06%	2.98%	4.37%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

由於午盤的交易日大幅上漲，指數出現反轉大幅上漲。VN-Index 收漲 1.59%，止於 1,258.95 點，HNX-Index 比去年同期上漲 0.63%，Upcom-Index 上漲 0.6%。3 大市場的交易額均小幅增加至 15 兆 1,150 億越南盾。

當 VN30 -Index 大幅上漲 1.74%，漲幅擴散至 29 檔股票時，大型股回歸領先上漲趨勢。其中，VHM、VIC、BID、VRE、TCB、ACB、BID、VPB、FPT、MSN、POW 等上漲超過 1%。

現金流回歸流入證券和房地產股，幫助該股票如 VIX (2.26%)、HCM (2.84%)、VND (3.19%)、VCI (5.08%)、FTS (3.24%) 或 DXG (4.03%)、PDR (5.07%)、HDG (2.36%) 大幅上漲。漲幅擴散整個市場，並在 HOSE 上有 312 檔上漲股和 88 檔下跌股。

外資在連續第二個交易日買超進 5,220 億越南盾，其中 VHM (1,930 億)、FPT (1,890 億)、SSI (460 億) 在買超方面的榜首。相反，MWG (1,440 億)、KDH (340 億)、VPB (270 億) 在賣超方面領先。

市場短期觀點

我們認為市場可能會繼續上漲動能，VN-Index 可能會測試 1,270 - 1,275 點的阻力位。同時，市場仍處於短期調整階段，短期風險出現下跌的跡象。然而，當 VN-Index 在下一交易日在 1,260 點可能無法退出連續震盪期。此外，情緒指標仍持續處於悲觀態度，大盤的短期走勢仍維持下跌。

我們建議投資者可繼續在目前水平持有股票比例，並在短期風險出現下跌跡象的情況下不應賣出。

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	下跌	中性	1300	1330	870	800
HNX-Index	下跌	中性	260	306	189	160
VN30	下跌	中性	1336	1350	980	960
VNMidcaps	下跌	中性	1280	1250	963	900
VNSmallcaps	下跌	中性	1250	1250	804	750



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1258.95	1.59%
VN30	1303.65	1.74%
VN Mid	1880.68	1.56%
VN Small	1402.55	0.82%

河內交易所 (HSX)

	收盤	漲跌%
HNI	232.3	0.63%
HN30	504.42	1.27%
VNX AllSh	1299.68	1.62%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	93.12	0.60%

外資交易	成交值 (Bil.VND)
買進	1480.96
賣出	955.69
買超/賣超	525.27

外資交易	成交值 (Bil.VND)
買進	43.21
賣出	40.17
買超/賣超	3.04

外資交易	成交值 (Bil.VND)
買進	3.40
賣出	9.17
買超/賣超	-5.77

上漲排名/ 股碼	漲跌(VND)	漲跌%
IMP	3250	6.99%
PMG	420	6.10%
VHM	2250	5.39%
DPG	2800	5.19%
VCI	1650	5.08%

上漲排名/ 股碼	漲跌(VND)	漲跌%
CMS	900	9.89%
KSQ	300	9.68%
VHE	300	8.82%
TTH	200	7.14%
API	500	6.10%

上漲排名/ 股碼	漲跌(VND)	漲跌%
DFP	223	10.14%
FOC	1443	1.66%
MCH	3077	1.51%
TIS	97	1.47%
AAS	76	1.06%

下跌排名/ 股碼	漲跌(VND)	漲跌%
SGR	-3400	-6.90%
SMC	-610	-6.83%
ITA	-220	-6.79%
TCD	-340	-5.67%
APH	-180	-2.81%

下跌排名/ 股碼	漲跌(VND)	漲跌%
CTP	-3800	-9.84%
NTP	-6000	-8.57%
DNP	-1500	-6.25%
NRC	-100	-3.45%
VFS	-300	-2.21%

下跌排名/ 股碼	漲跌(VND)	漲跌%
HIO	-720	-5.22%
LTG	-419	-2.81%
SGP	-750	-2.80%
OIL	-337	-2.51%
VNZ	-7536	-2.00%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/ 股碼	Bil.VND
VCB	505,812,759
BID	277,611,228
FPT	194,093,548
VHM	191,592,169
CTG	187,681,212

市值排名/ 股碼	Bil.VND
IDC	19,205,996
PVS	19,118,652
MBS	15,044,080
HUT	14,815,699
THD	13,782,999

市值排名/ 股碼	Bil.VND
ACV	231,091,997
VGI	187,081,768
MCH	150,055,820
BSR	72,582,696
VEA	57,572,918

交易量排名/ 股碼	成交值	30 日均
SSB	63,841,556	9,534,019
EIB	40,301,800	11,300,524
NVL	30,683,200	18,725,199
VIX	24,594,900	26,366,278
VHM	15,846,303	14,737,631

交易量排名/ 股碼	成交值	30 日均
SHS	90,108,405,500	9,136,023
CEO	64,631,551,600	6,346,121
GKM	527,746,800	2,330,022
MBS	70,316,524,200	2,628,841
TNG	64,342,641,400	2,337,254

交易量排 名/股碼	成交值	30 日均
PSP	0	489,380
BSR	123,312,975,800	6,797,957
DFP	5,425,153,900	653,305
OIL	21,810,380,200	2,221,830
BGE	462,518,100	291,714

資料源: Bloomberg & Yuanta Research

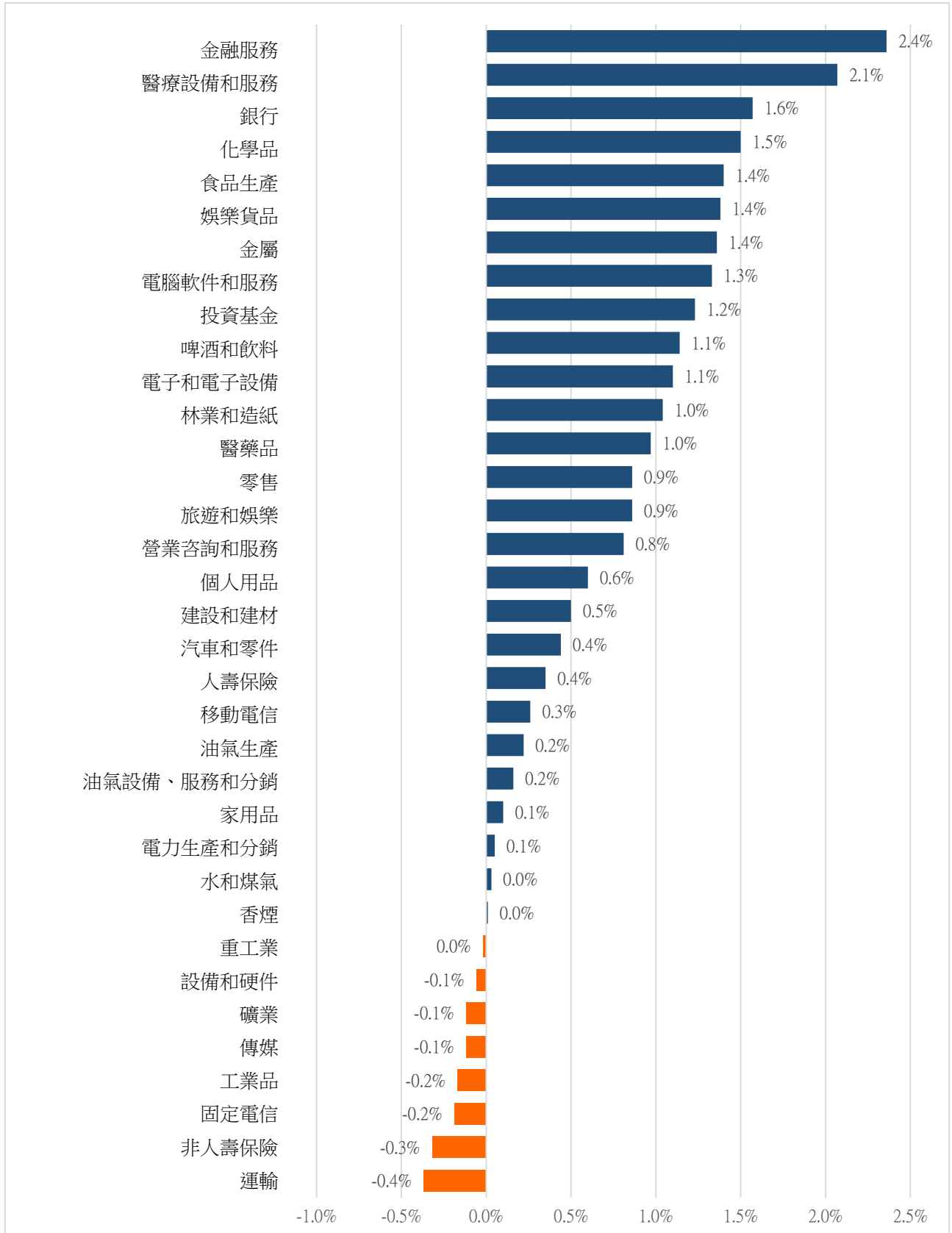
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



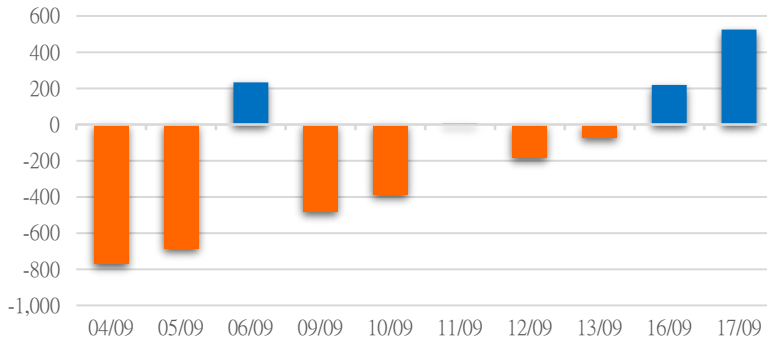
資料源: FinPro - YSVN



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外資買進賣統計

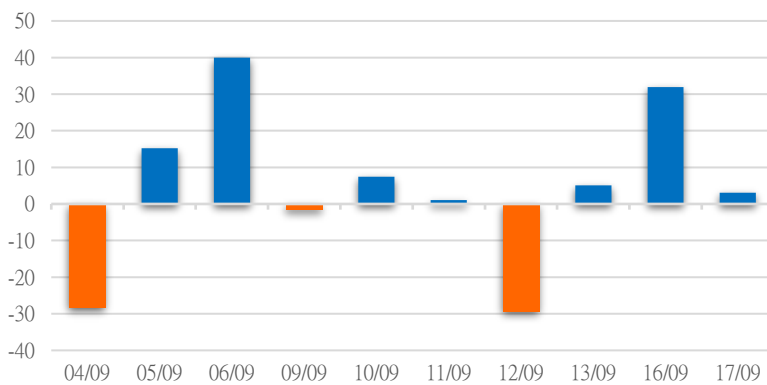
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VHM	192,813	MWG	-143,812
FPT	188,511	KDH	-34,552
SSI	45,531	VPB	-26,615
NVL	44,703	DCM	-18,225
DIG	40,311	STB	-13,481

HSX 外資買/賣超的前 5 名

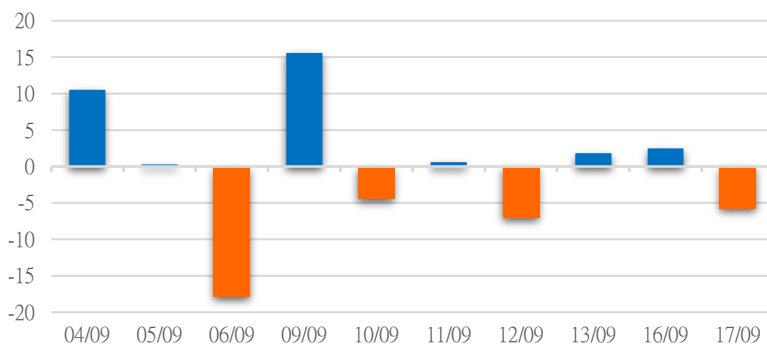
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	16,142	NTP	-9,689
CEO	1,230	IDC	-1,916
PVI	635	BVS	-1,704
TNG	612	MBS	-1,339
API	430	VGS	-1,024

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	779	LTG	-3,015
IDP	265	ACV	-1,932
KLB	238	GDA	-1,636
MCH	207	QNS	-482
VGR	163	DNW	-416

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

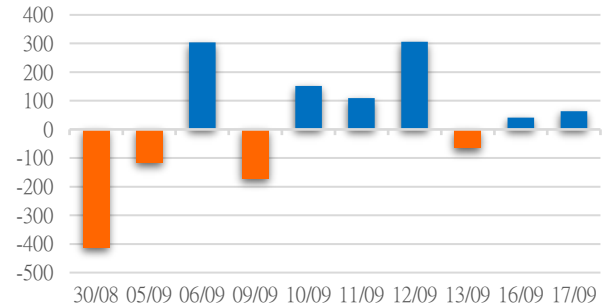
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自營統計

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VHM	39,182	TCD	63,376
BID	32,114	MSN	13,092
ACB	25,488	VNM	11,437
TCB	20,238	FPT	10,027
VPB	11,167	KDH	7,977

HSX 自營交易最大前名

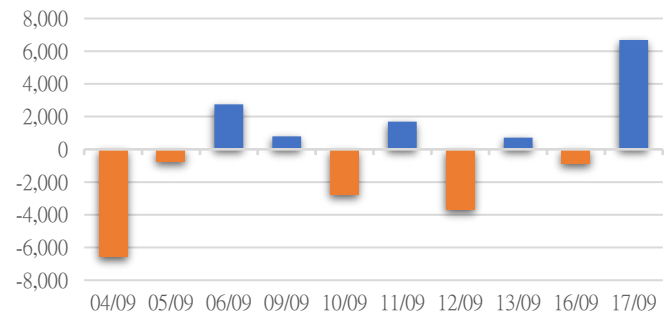
HSX 自營交易每日買/賣超
(Bil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DL1	3,010	VCS	1,537
TNG	2,254		
PVS	1,920		
IDC	1,046		

HNX 自營交易最大前名

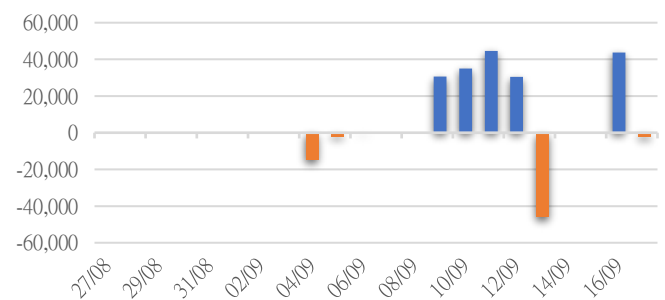
HNX 自營交易每日買/賣超
(Mil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VNP	2,750.00	MCH	4,149
VNZ	182.50	AFX	938
VEA	86.30		
BSR	46.40		

UPCoM 自營交易最大前名

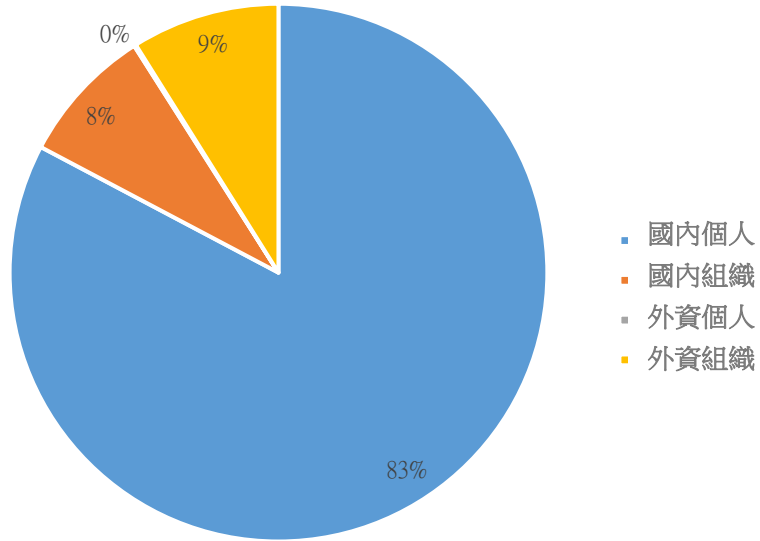
UPCoM 自營交易每日買/賣超
(Mil.VND)





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越南證券市場投資人類別統計

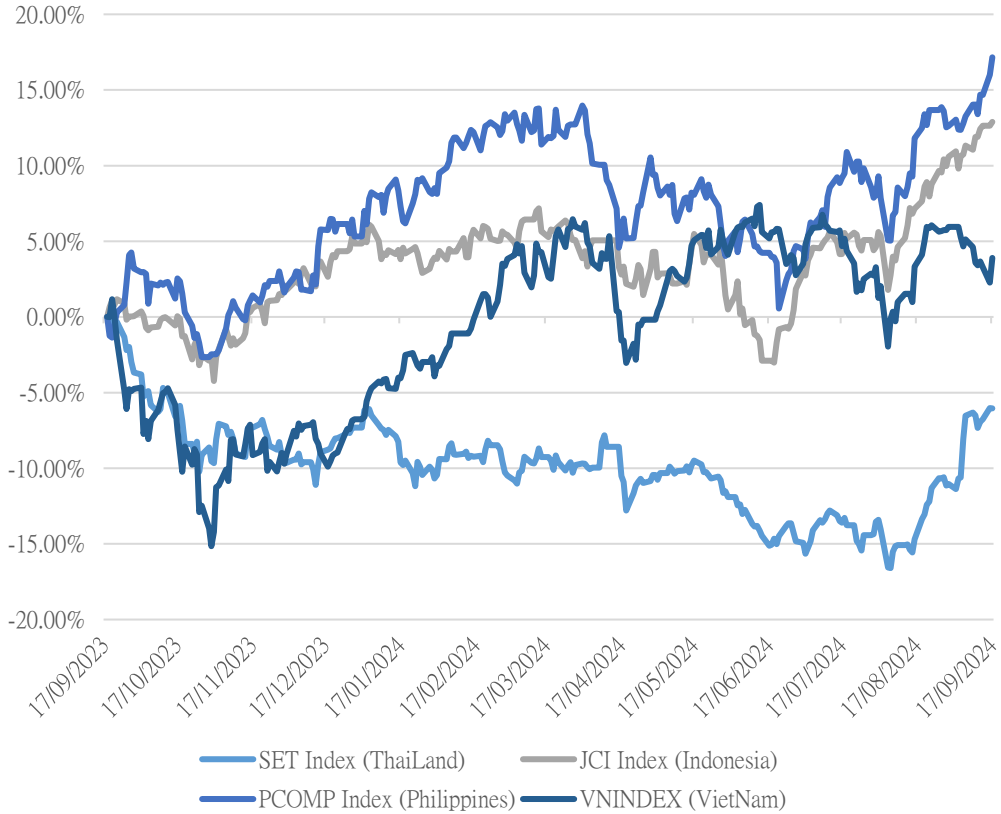


資料源: FiinPro - YSVN



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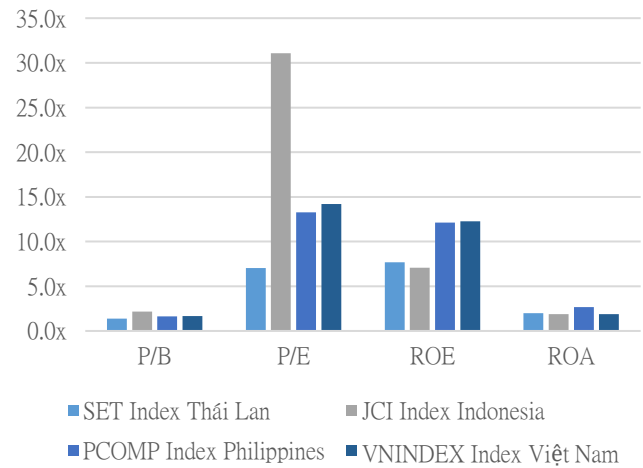
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.2x	1.6x	1.7x
P/E		7.1x	31.1x	13.3x	14.2x
ROE	%	7.68	7.07	12.14	12.26
ROA	%	2.00	1.89	2.68	1.90
Vốn hóa	Tỷ USD	534.05	874.94	175.18	206.89
GTGD	Triệu USD	1.78	0.63	0.04	0.43
LS cổ tức	%	3.31	3.06	2.65	1.79

源: Bloomberg & YSVN





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