

當日市場：指數在連續第三個交易日上漲

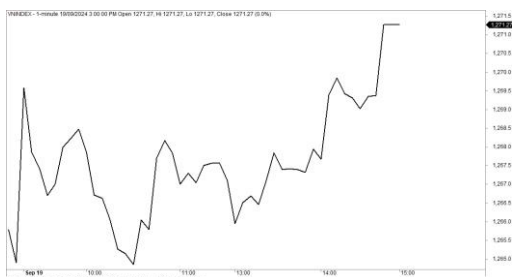
2024/09/20

市場走勢

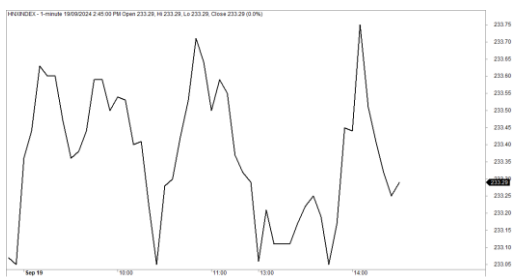
市場指數	VNI	HNI	UPCOM
收盤	1,271.27	233.77	93.63
%日	0.50%	0.35%	0.17%
%週	1.19%	0.81%	0.97%
%月	0.76%	-0.95%	-0.10%
%年	4.93%	-6.57%	0.60%
成交值(Bil.VND)			
當日	14,268	991	622
日均量/週	14,184	961	535
日均量/月	15,210	1,062	600
外資進出			
買進	1,767.62	37.61	19.01
賣出	1,296.19	35.34	57.40
買賣超	471.43	2.27	-38.40
市場漲跌家數			
上漲	195	77	177
下跌	99	71	140
持平	121	166	586
市場指標			
P/E	13.76	16.21	27.92
總市值 (兆盾)	5,214	328	1,457
股息殖利 ²	2.06%	2.96%	4.34%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

美聯準會降息符合預期以及大型股持續上漲勢頭幫助指數在連續第三個交易日延續上漲勢頭。VN-Index 收漲 0.5%，止於 1,271.27 點，HNX-Index 上漲 0.35%，Upcom-Index 上漲 0.17%。3 大市場的交易額均減少至 15 兆 8,810 億越南盾。

SSB 在經歷了前一段時間的大幅下跌後漲停，止於 16,650 點。銀行板塊和房地產板塊是支撐市場的板塊。漲幅繼續佔主導地位，適度的賣壓幫助市場在午盤的交易日更加大幅上漲。在下跌方面，POW (-1.57%) 是 VN30-Index 中的唯一檔下跌股票。

工業園區房地產板塊如 KBC (5.94%)、SZC (2.07%)、LHG (1.34%)，塑膠板塊如 NTP (3.91%)、BMP (6.95%) 和畜牧板塊 BAF (325%) 是上漲的板塊強於市場。

外資在連續第四個交易日買超 4,350 億越南盾，其中 SSI (2,810 億)、HCM (590 億)、FUEVFNVD (520 億) 在買超方面的榜首。相反，HPG (750 億)、越南盾 (450 億)、VPB (350 億) 在拋售最多的股票。

市場短期觀點

我們認為市場可能維持上行勢頭，VN-Index 在下一交易日可能在 1,270 - 1,275 點出現震盪。同時，短期風險持續逐步下跌，但市場仍處於短期調整階段，因此市場在未來的幾個交易日可能仍出現震盪和在各類股票之間出現分化。積極點的是，現金流出現流入大型股的跡象，而情緒指標大幅上漲顯示投資者對當前市場走勢的悲觀情緒有所走弱。大盤的短期走勢也調整至中性。因此，我們建議投資者繼續持有和逐步增加股票比例，尤其是投資者可以考慮較低比例的買新。

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

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1271.27	0.50%
VN30	1318.41	0.57%
VN Mid	1895.63	0.48%
VN Small	1416.83	0.58%

河內交易所 (HSX)

	收盤	漲跌%
HNI	233.77	0.35%
HN30	509.85	0.66%
VNX AllSh	1313.11	0.54%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	93.63	0.17%

外資交易	成交值 (Bil.VND)
買進	1767.62
賣出	1296.19
買超/賣超	471.43

外資交易	成交值 (Bil.VND)
買進	37.61
賣出	35.34
買超/賣超	2.27

外資交易	成交值 (Bil.VND)
買進	19.01
賣出	57.40
買超/賣超	-38.40

上漲排名/股碼	漲跌(VND)	漲跌%
BMP	7900	6.95%
GIL	2000	6.92%
TCO	1100	6.83%
SSB	1050	6.73%
QCG	390	6.06%

上漲排名/股碼	漲跌(VND)	漲跌%
EVS	400	6.35%
HMR	700	6.19%
DTD	1100	4.49%
NTP	2500	3.91%
API	300	3.57%

上漲排名/股碼	漲跌(VND)	漲跌%
BOT	219	9.12%
BMS	706	8.40%
VHG	104	6.93%
VNZ	23344	5.99%
VNA	1012	5.09%

下跌排名/股碼	漲跌(VND)	漲跌%
SGR	-2600	-5.53%
SBT	-450	-3.30%
SMC	-240	-2.84%
ST8	-180	-2.16%
DSE	-500	-1.93%

下跌排名/股碼	漲跌(VND)	漲跌%
GKM	-2500	-8.42%
DL1	-200	-2.56%
TVC	-100	-0.98%
VFS	-100	-0.72%
SCG	-300	-0.46%

下跌排名/股碼	漲跌(VND)	漲跌%
HBC	-390	-6.72%
DFP	-145	-5.37%
HIO	-575	-4.79%
HNG	-183	-3.73%
DGT	-156	-2.26%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	Bil.VND
VCB	508,607,305
BID	279,606,381
FPT	196,576,310
CTG	191,708,705
VHM	191,156,733

市值排名/股碼	Bil.VND
IDC	19,271,996
PVS	19,214,245
MBS	15,427,020
HUT	14,815,699
THD	13,782,999

市值排名/股碼	Bil.VND
ACV	233,181,869
VGI	200,909,802
MCH	151,234,081
BSR	73,171,791
VEA	58,606,724

交易量排名/股碼	成交值	30 日均
SSB	74,139,498	16,407,269
SSI	24,638,017	14,806,837
EIB	21,546,000	12,487,106
VPB	20,966,800	19,182,002
DXG	16,517,100	15,108,232

交易量排名/股碼	成交值	30 日均
HBS	607,680,000	254,904
CEO	109,153,343,700	6,102,053
SHS	95,809,145,800	9,101,600
HUT	11,968,475,600	1,982,769
TNG	62,640,188,500	2,294,225

交易量排名/股碼	成交值	30 日均
HNG	43,681,012,500	7,468,155
VNA	2,167,603,200	368,399
BSR	83,849,039,900	6,588,649
AAH	12,733,260,000	928,747
BCR	11,057,573,300	1,721,572

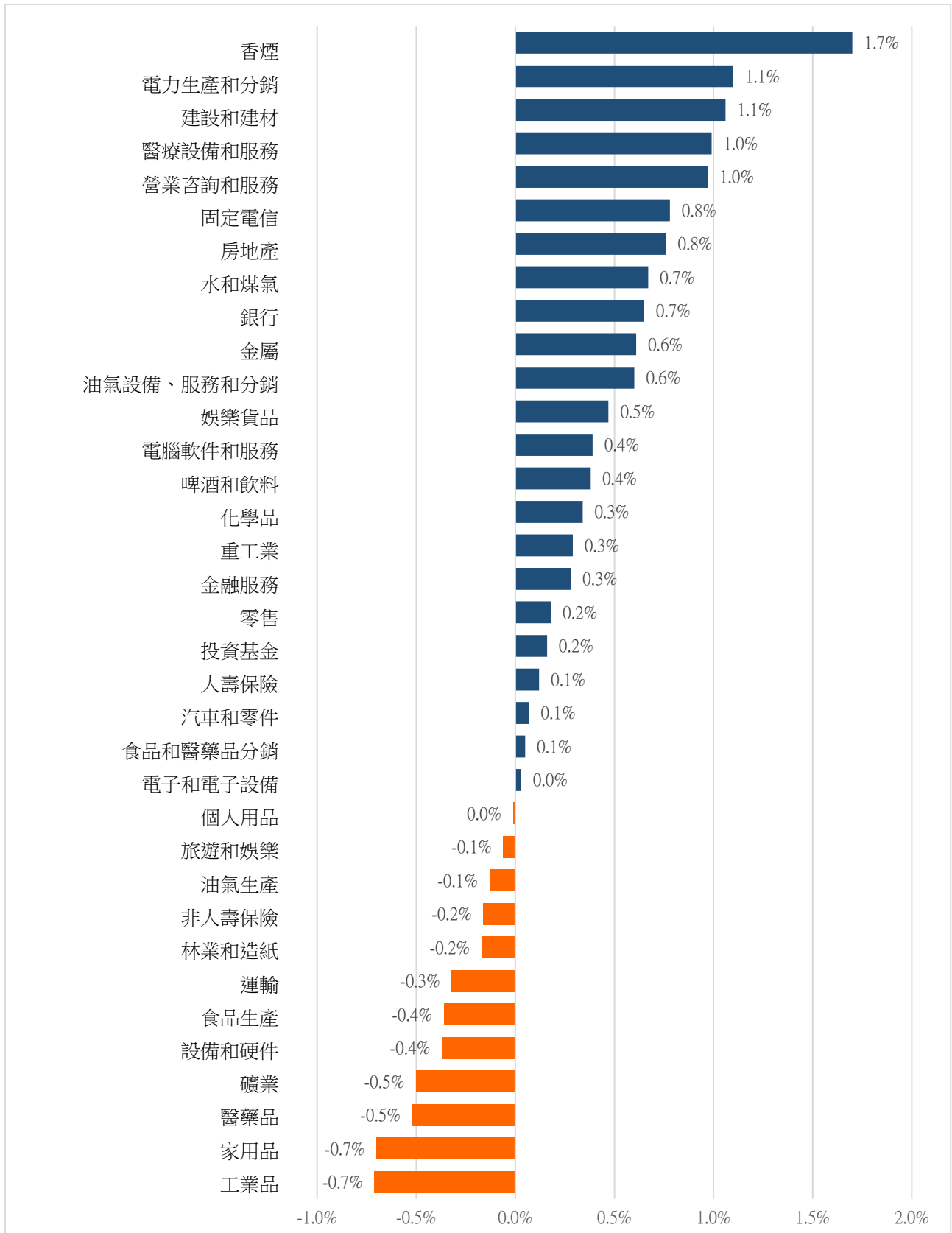
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



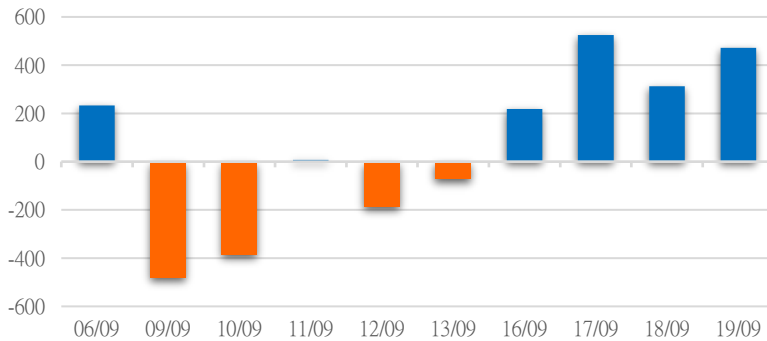
資料源: FiinPro - YSVN



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外資買進賣統計

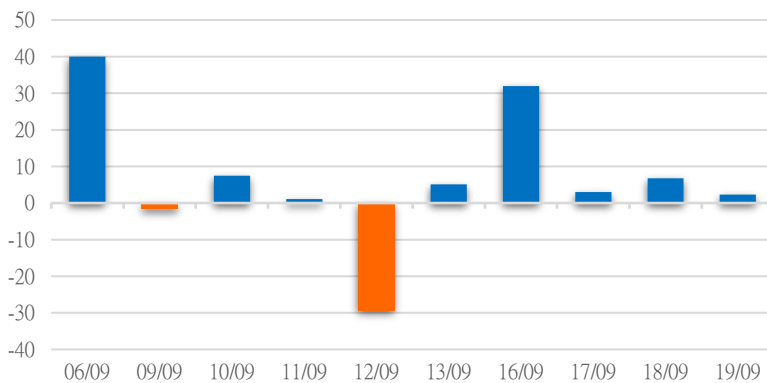
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SSI	280,845	HPG	-74,896
HCM	58,747	VND	-44,624
FUEVFNVD	51,784	VPB	-35,383
VHM	41,241	VCG	-33,978
PDR	37,286	KDH	-32,474

HSX 外資買/賣超的前 5 名

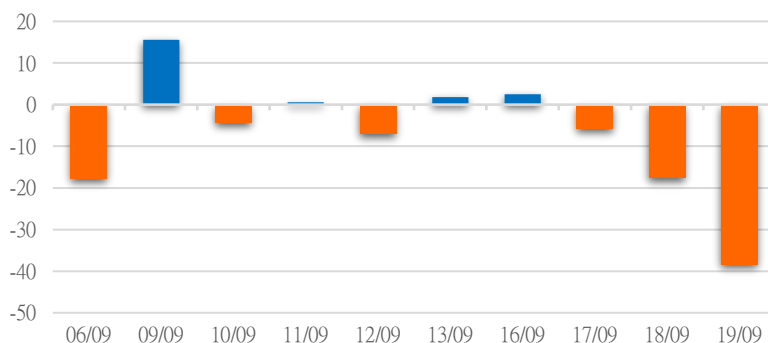
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	3,330	TNG	-7,382
PVI	3,155	PVS	-3,409
VC3	2,133	VGS	-1,113
CEO	1,669	NTP	-586
BVS	1,252	GKM	-257

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)
HNG	2,955	QNS	-13,274
VEA	2,421	BSR	-11,709
KLB	409	ACV	-10,343
PGB	327	GDA	-3,590
OIL	268	LTG	-2,820

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



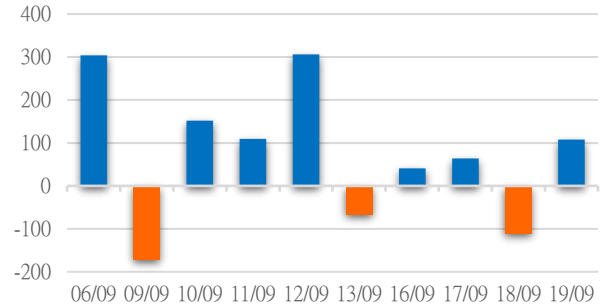
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自營統計

證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
TCB	25,852	FUEKIV30	52,521
STB	17,717	FUEVFNVD	33,847
VPB	16,060	DGC	15,875
ACB	15,999	VTP	8,846
HDB	15,412	CTD	8,591

HSX 自營交易最大前名

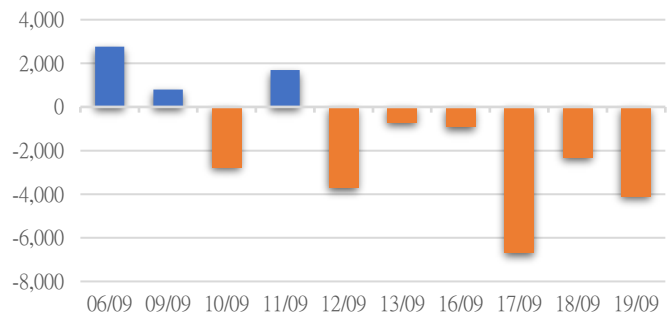
HSX 自營交易每日買/賣超 (Bil.VND)



證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
		VCS	2,383
		IDC	877
		TNG	429
		PVS	404

HNX 自營交易最大前名

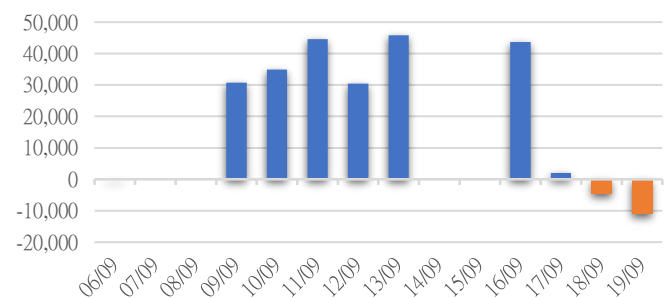
HNX 自營交易每日買/賣超 (Mіл.VND)



證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
BSR	23,40	AFX	4,355
		QNS	3,321
		MCH	2,988
		FOX	365

UPCoM 自營交易最大前名

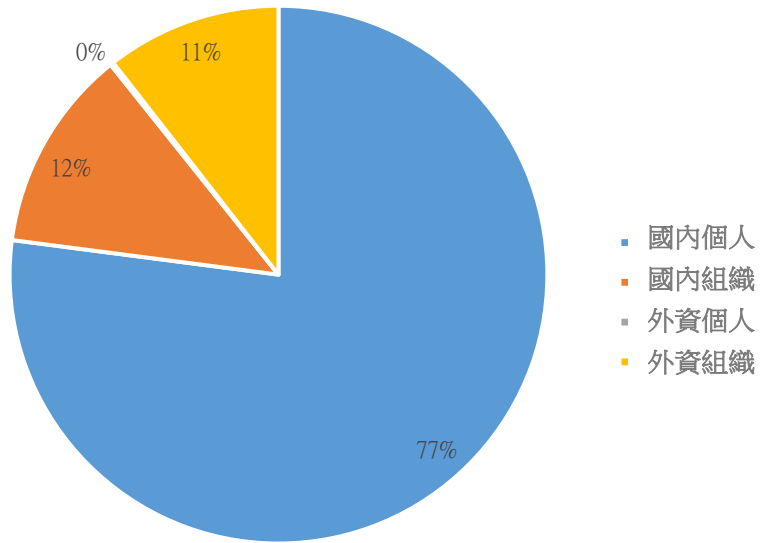
UPCoM 自營交易每日買/賣超 (Mіл.VND)





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越南證券市場投資人類別統計

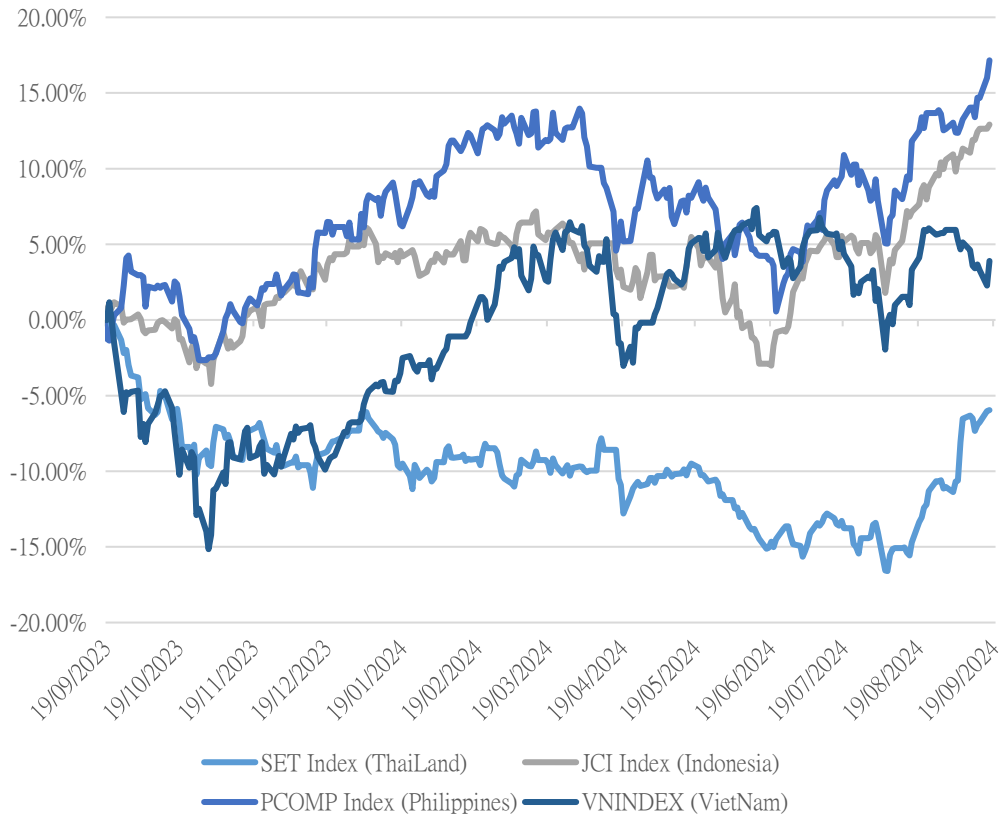


資料源: FiinPro - YSVN



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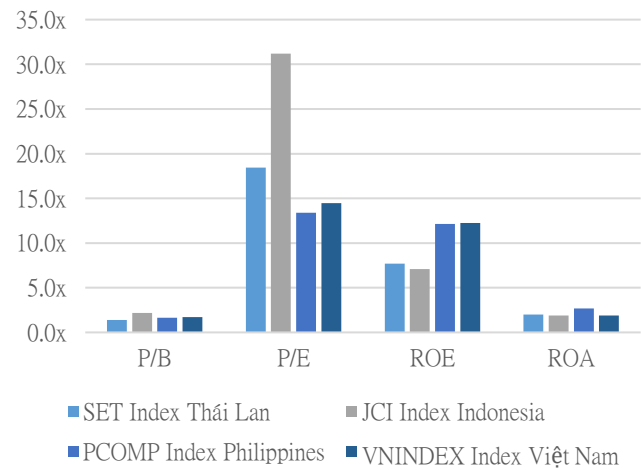
東南亞主要市場走勢比較



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		18.4x	31.2x	13.4x	14.5x
ROE	%	7.69	7.08	12.14	12.26
ROA	%	2.00	1.89	2.68	1.90
Vốn hóa	Tỷ USD	535.27	876.65	176.67	211.26
GTGD	Triệu USD	1.66	0.67	0.08	0.60
LS cổ tức	%	3.29	3.03	2.64	1.78

源: Bloomberg & YSVN





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