

當日市場：紅跌佔主導地位，市場小幅下跌

2024/10/01

市場走勢

市場指數	VNI	HNI	UPCOM
收盤	1,287.94	234.91	93.56
%日	-0.23%	-0.34%	-0.36%
%週	1.53%	0.66%	-0.10%
%月	0.32%	-1.12%	-0.65%
%年	11.59%	-0.61%	5.38%

成交值(Bil.VND)

當日	16,261	1,148	703
日均量/週	20,043	1,349	862
日均量/月	16,001	1,092	644

外資進出

買進	1,416.58	23.67	8.70
賣出	1,920.11	102.81	3.35
買賣超	-503.53	-79.14	5.34

市場漲跌家數

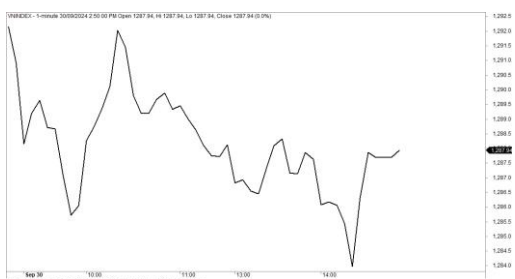
上漲	121	61	124
下跌	192	98	200
持平	102	156	579

市場指標

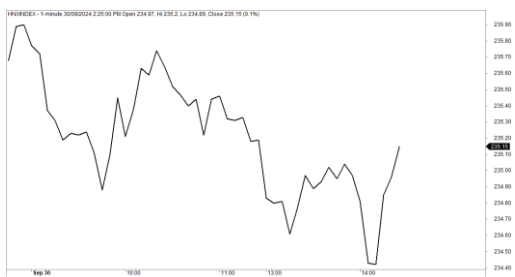
P/E	13.94	16.34	27.57
總市值 (兆盾)	5,285	331	1,434
股息殖利 ²	2.17%	2.97%	4.24%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在本周的首個交易日出現分化並走弱，但低價需求仍活躍，幫助指數小幅下跌。VN-Index 在連續第二個交易日收跌，止於 1287.94 點，跌幅為 0.23%。HNX-Index 下跌 0.34%，Upcom-Index 下跌 0.36%。3 大市場的交易額均下降至 18 兆 1,120 億越南盾。

VN30-Index 收盤於參考以 8 檔上漲股和 19 檔下跌股，顯示藍籌股的跌幅相對收窄。具體而言，BCM、BVH、SAB、VHM、VIC、VNM、VRE 下降 1% 左右。相反，VPB (1.77%)、TPB (1.78%)、SSI (1.09%)、HPG (1.15%) 是積極上漲最大的股票。

銀行股和證券股突出暴漲於大盤，得益於 MSB (3.57%)、VCI (2.23%)、VDS (2.52%)、SSI (1.09%) 等。此外，畜牧股也有積極走勢如 HAG (1.88%)、BAF (2.63%)。相反，房地產股出現不佳，NVL (-4.33%)、PDR (-1.32%)。

外資反轉賣超 5,790 億越南盾，其中 HPG (2,910 億)、STB (1,100 億)、GMD (510 億) 在拋售最多的股票。相反，FPT (440 億)、SSI (360 億)、VHM (350 億) 在買超方面的榜首。

市場短期觀點

我們認為市場可能會在下一交易日回歸上漲勢頭，VN-Index 可能會快速重新測試 1,300 點。同時，市場仍處於積極劇烈波動時期的階段，因此我們預期調整期可能會快速結束。此外，短期情緒指標小幅下降，顯示投資者在 VN-Index 接近 1,300 點時出現謹慎態度，但短期風險仍然較低，現金流仍主要集中在 VN-Index。

大盤的短期走勢仍維持上漲。因此，我們建議投資者在短期投資組合繼續買進並持有高比例的股票。

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



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1287.94	-0.23%
VN30	1352.56	0.00%
VN Mid	1943.23	0.14%
VN Small	1425.53	0.05%

河內交易所 (HSX)

	收盤	漲跌%
HNI	234.91	-0.34%
HN30	513.48	-0.42%
VNX AllSh	1344.59	0.04%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	93.56	-0.36%

外資交易	成交值 (Bil.VND)
買進	1416.58
賣出	1920.11
買超/賣超	-503.53

外資交易	成交值 (Bil.VND)
買進	23.67
賣出	102.81
買超/賣超	-79.14

外資交易	成交值 (Bil.VND)
買進	8.70
賣出	3.35
買超/賣超	5.34

上漲排名/股碼	漲跌(VND)	漲跌%
D2D	2800	6.02%
PAC	2500	5.81%
MSB	450	3.57%
DLG	60	3.30%
TLH	150	2.74%

上漲排名/股碼	漲跌(VND)	漲跌%
MCO	1000	9.52%
HGM	5400	7.20%
API	400	4.55%
CMS	500	4.42%
VFS	300	2.26%

上漲排名/股碼	漲跌(VND)	漲跌%
VNA	3052	12.61%
VGT	400	2.84%
DSC	484	2.06%
BCR	106	1.96%
KGM	150	1.81%

下跌排名/股碼	漲跌(VND)	漲跌%
AGM	-270	-6.51%
NVL	-500	-4.33%
BMP	-4700	-3.81%
SGR	-1550	-3.64%
BMC	-750	-3.55%

下跌排名/股碼	漲跌(VND)	漲跌%
DST	-300	-8.82%
DNP	-2300	-8.58%
SPI	-400	-8.33%
NTP	-2700	-4.22%
C69	-300	-3.75%

下跌排名/股碼	漲跌(VND)	漲跌%
SAC	-2656	-12.35%
HNF	-2715	-9.43%
HNG	-279	-5.58%
DFP	-104	-4.33%
SRT	-409	-3.15%

*GTVH > 500 tỷ đồng, GTDG > 1.5 tỷ đồng

市值排名/股碼	Bil.VND
VCB	516,990,942
BID	285,591,839
CTG	198,689,695
FPT	195,992,130
VHM	188,979,549

市值排名/股碼	Bil.VND
PVS	19,453,228
IDC	19,172,996
MBS	17,450,893
HUT	14,726,447
THD	13,667,499

市值排名/股碼	Bil.VND
ACV	229,393,975
VGI	198,423,008
MCH	143,516,688
BSR	76,132,768
VEA	58,997,391

交易量排名/股碼	成交值	30 日均
TPB	41,162,002	16,233,128
HPG	37,965,219	21,563,768
VPB	30,702,801	26,856,402
NVL	30,198,100	14,972,797
MSB	26,521,700	11,912,823

交易量排名/股碼	成交值	30 日均
SHS	133,038,267,500	9,165,185
TIG	53,626,156,100	1,555,302
CEO	58,068,150,500	5,205,139
DNP	80,166,287,500	352,964
MBS	101,489,162,900	3,376,210

交易量排名/股碼	成交值	30 日均
BSR	194,198,023,600	6,323,671
VGT	48,063,182,300	995,220
HNG	15,113,721,200	8,509,021
BCR	13,068,843,600	1,353,914
OIL	27,083,566,500	1,668,479

資料源: Bloomberg & Yuanta Research

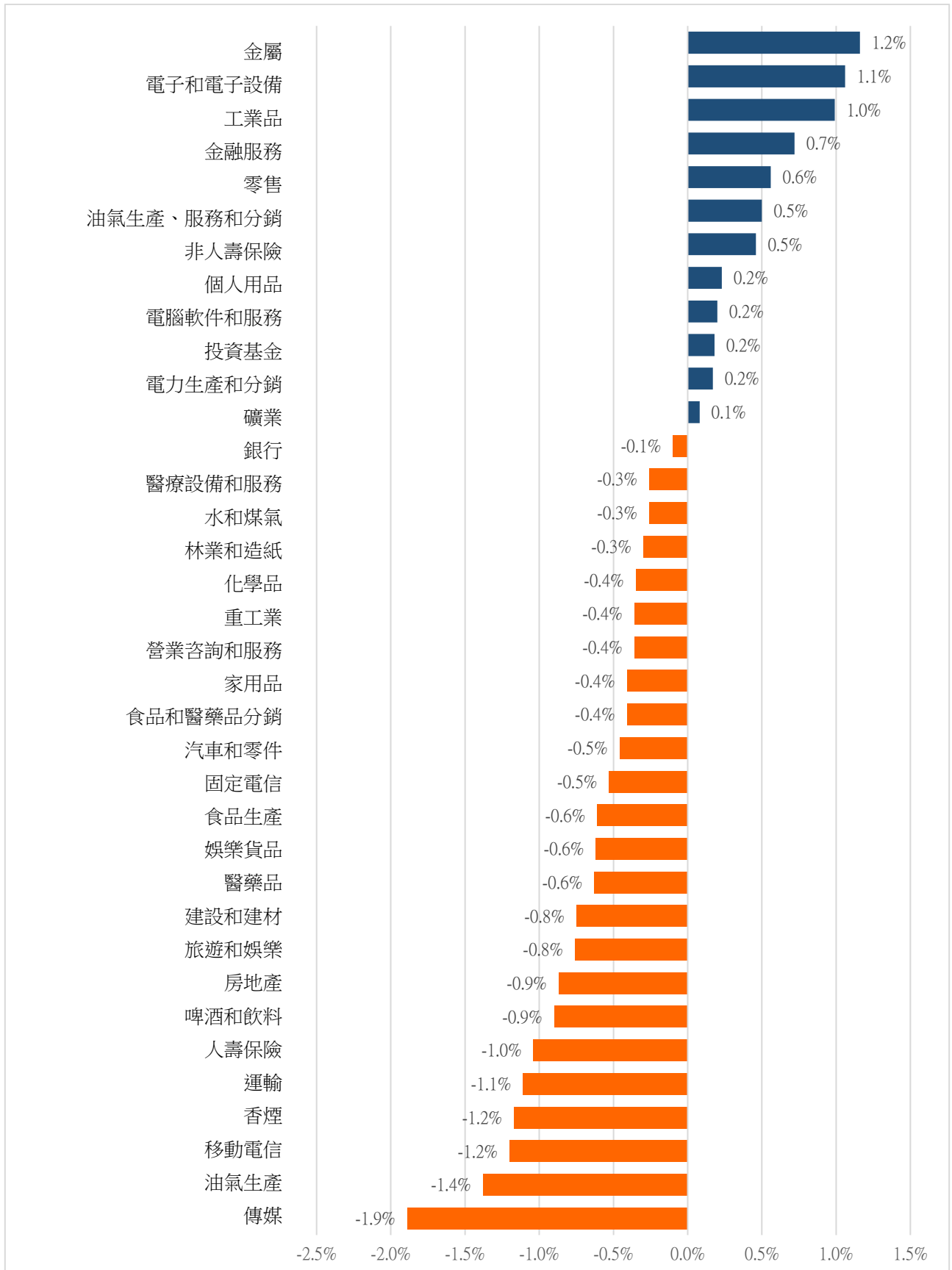
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



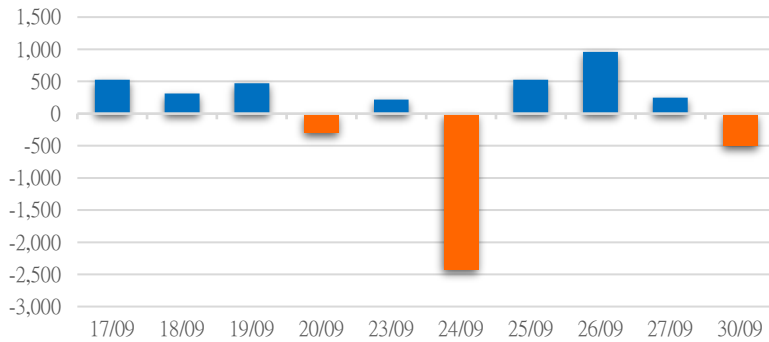
資料源: FinPro - YSVN



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外資買進賣統計

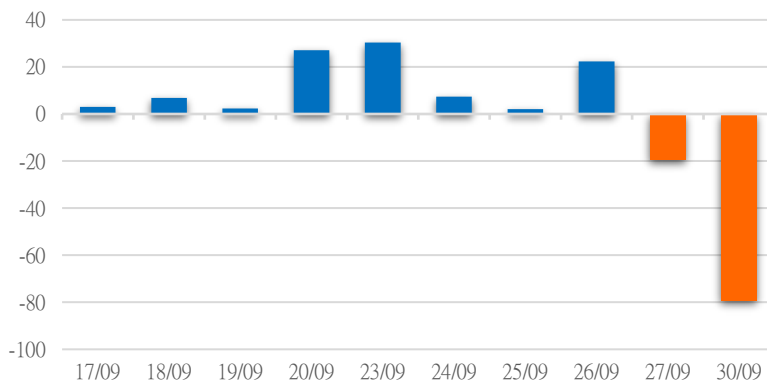
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
FPT	44,808	HPG	-291,287
SSI	35,950	STB	-110,092
VHM	34,513	GMD	-51,120
DGC	29,166	VRE	-48,951
PVD	24,433	VPB	-45,487

HSX 外資買/賣超的前 5 名

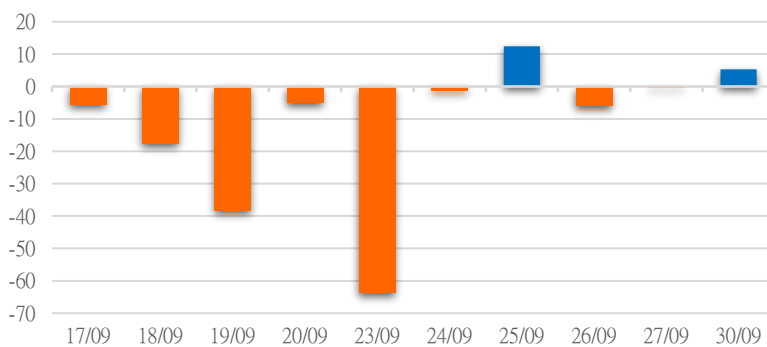
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BVS	3,428	PVS	-31,928
PVI	668	IDC	-20,357
API	633	SHS	-15,565
VTZ	320	MBS	-5,571
TIG	251	VGS	-3,805

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	3,358	ACV	-1,140
MCH	1,490	VGI	-474
QNS	1,084	DDV	-159
ABI	538	CSI	-125
GDA	189	IFS	-57

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)
PNJ	38,866	VIB	37,328
VHM	36,379	TPB	25,679
FRT	28,590	TCB	15,172
HPG	9,758	CTG	13,772
VNM	9,502	VRE	10,731

HSX 自營交易最大前名

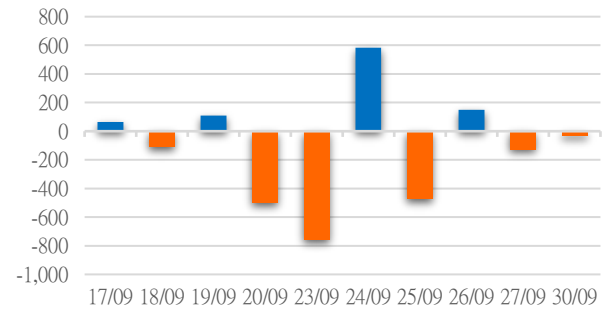
證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
MST	3,780	DNP	80,000
PVS	1,483	TNG	526
IDC	1,151	VGS	391

HNX 自營交易最大前名

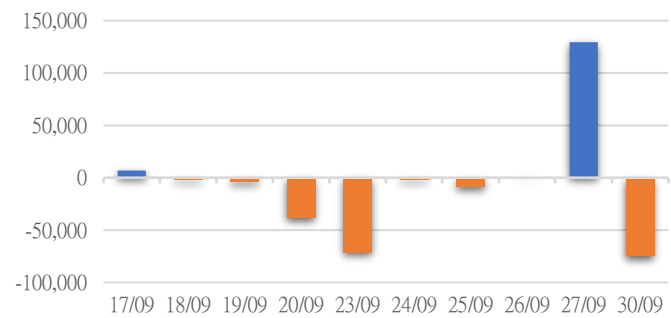
證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
APF	59.20	BSR	2,435

UPCoM 自營交易最大前名

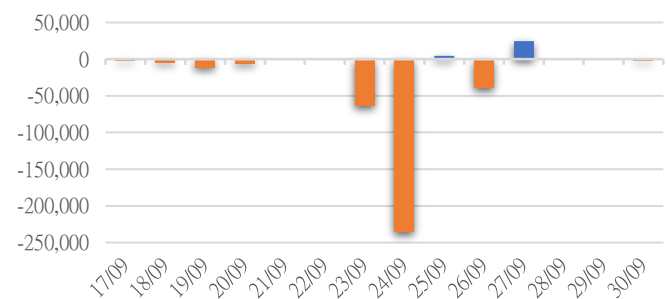
HSX 自營交易每日買/賣超
(Bil.VND)



HNX 自營交易每日買/賣超
(Mіл.VND)



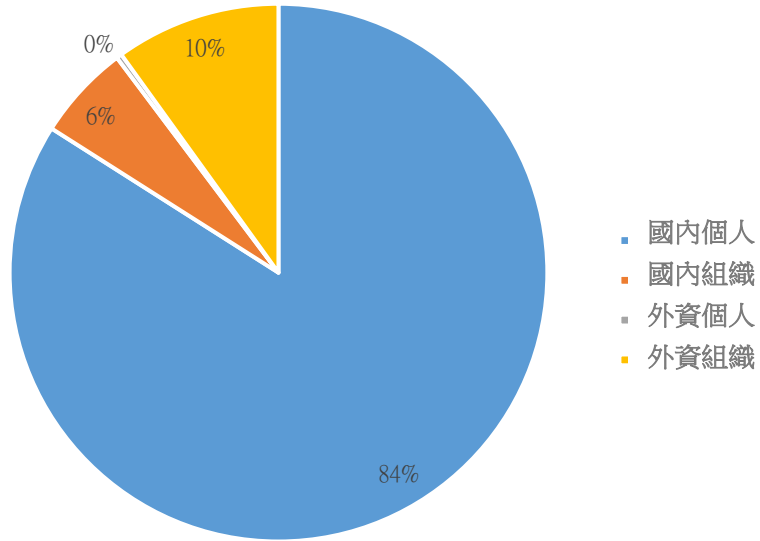
UPCoM 自營交易每日買/賣超
(Mіл.VND)





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越南證券市場投資人類別統計

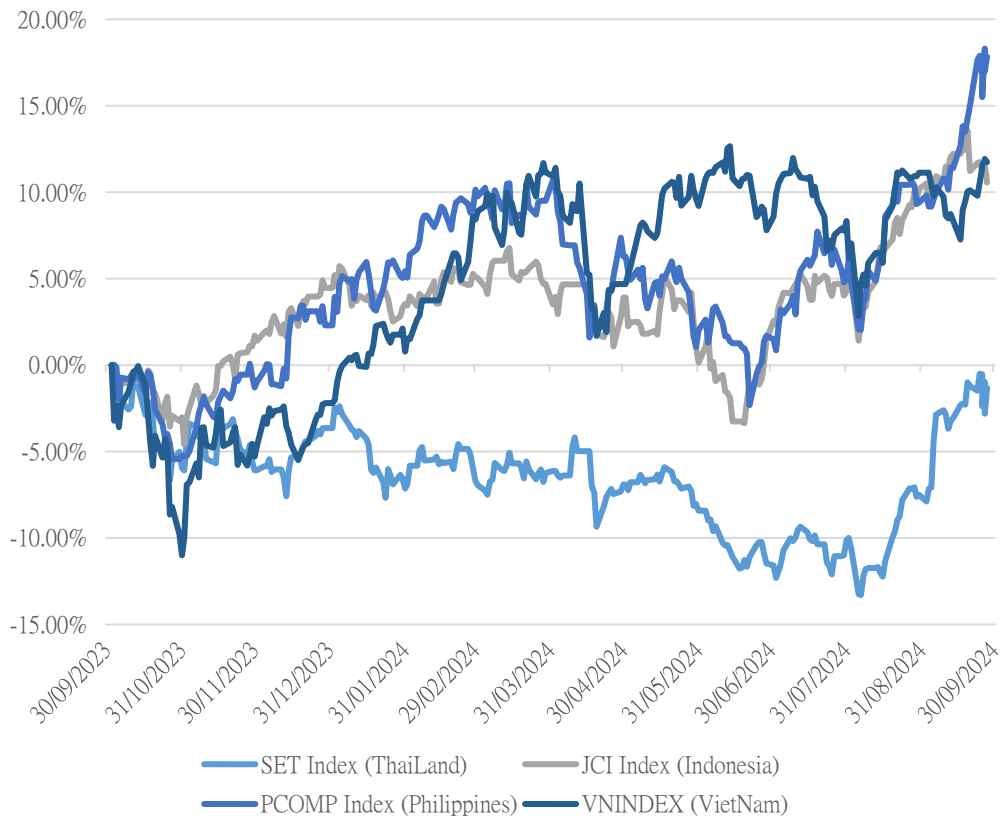


資料源: FiinPro - YSVN



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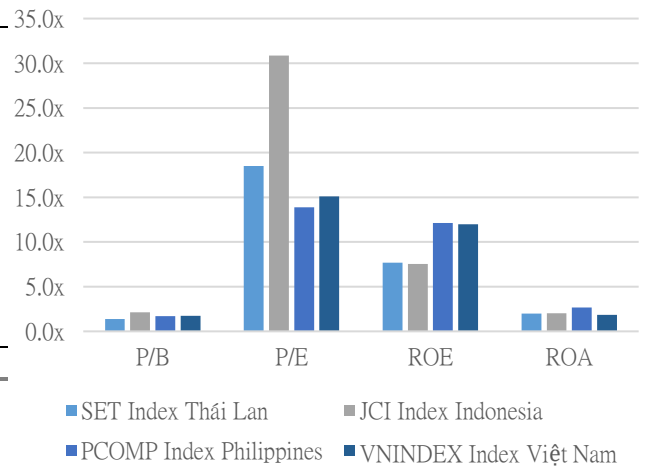
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.1x	1.7x	1.7x
P/E		18.5x	30.9x	13.9x	15.1x
ROE	%	7.68	7.56	12.14	11.99
ROA	%	2.00	2.03	2.68	1.85
Vốn hóa	Tỷ USD	557.40	852.19	181.54	215.88
GTGD	Triệu USD	1.77	0.85	0.10	0.78
LS cổ tức	%	3.28	3.16	2.62	1.81

源: Bloomberg & YSVN



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



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