

當日市場：大型股持續積極

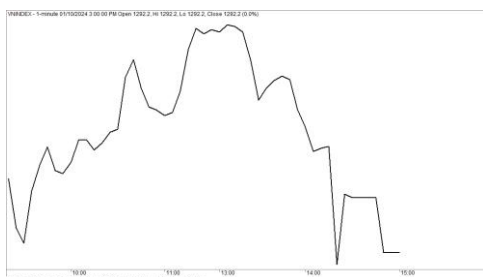
2024/10/02

市場走勢

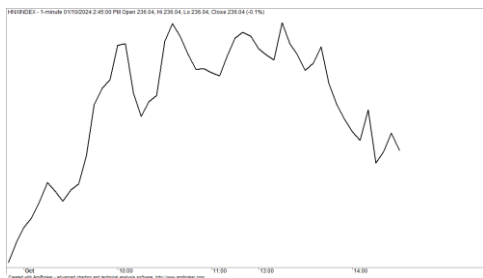
市場指數	VNI	HNI	UPCOM
收盤	1,292.20	236.05	93.28
%日	0.33%	0.48%	-0.30%
%週	1.19%	0.74%	-0.56%
%月	0.65%	-0.64%	-0.95%
%年	11.96%	-0.13%	5.07%
<b>成交值(Bil.VND)</b>			
當日	21,826	2,228	1,041
日均量/週	20,828	1,569	906
日均量/月	16,293	1,149	664
<b>外資進出</b>			
買進	1,912.67	38.67	8.37
賣出	1,223.09	171.30	93.60
買賣超	689.58	-132.63	-85.23
<b>市場漲跌家數</b>			
上漲	214	97	179
下跌	104	72	145
持平	97	146	579
<b>市場指標</b>			
P/E	13.99	16.36	27.70
總市值 (兆盾)	5,303	332	1,441
股息殖利 <sup>2</sup>	2.17%	2.98%	4.24%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在當日的交易日繼續上漲，並重新測試 1300 點。心理阻力位再次出現獲利壓力，導致指數下跌。VN-Index 收於 1292.2 點，並上漲 0.33%。HNX-Index 上漲 0.48%，Upcom-Index 下跌 0.3%。3 大市場的交易額均達到 25 兆 950 億越南盾。

VN30-Index 持續維持 0.47% 的良好漲幅，並維持上漲動力和圍繞大型股票的輪動。具體而言，FPT、HPG、MSN、TCB、VHM、VIB、VRE 上漲 1-2%。相反，VPB (-1%)、CTG (-1.22%)、HDB (-0.71%)、TPB (-0.58%) 逆勢而行。

證券股繼續受到關注，如 ORS 漲停，而 VIX (2.92%)、VND (1.31%) 在預計預融資法規將於 2019 年 11 月 2 日生效後出現積極上漲。

外資反轉買超近 4,630 億越南盾，其中 TCB (3,600 億)、FPT (3,290 億) 和 VHM (1,740 億) 在買超方面領先。相反，HDB (950 億)、VPB (880 億)、BVS (880 億) 在賣超方面的榜首。

市場短期觀點

我們認為，儘管在盤初的交易日可能出現調整壓力，但市場在下已交易日可能會持續上漲勢頭。同時，中小型股的現金流出現分化的跡象，並有所增加，而大型股在經歷了前期的一系列上漲後面臨更大的獲利壓力。然而，我們評估短期風險仍然較低，市場寬度有所改善，這顯示投資者再次逐漸更加樂觀，流動性在未來的幾個交易日的可以維持在較高水平。

大盤的市場短期走勢仍維持上漲。因此，我們建議投資者在投資組合繼續買進並持有高比例的股票。同時，投資者在目前階段不應拋售。

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

胡志明市交易所 (HSX)

河內交易所 (HSX)

UPCOM 市場 (UPCoM)



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	收盤	漲跌%
VNI	1292.2	0.33%
VN30	1358.88	0.47%
VN Mid	1945.8	0.13%
VN Small	1436.11	0.74%

	收盤	漲跌%
HNI	236.05	0.48%
HN30	515.9	0.47%
VNX AllSh	1349.85	0.39%

	收盤	漲跌%
UPCoM	93.28	-0.30%

外資交易	成交值 (Bil.VND)
買進	1912.67
賣出	1223.09
買超/賣超	689.58

外資交易	成交值 (Bil.VND)
買進	38.67
賣出	171.30
買超/賣超	-132.63

外資交易	成交值 (Bil.VND)
買進	8.37
賣出	93.60
買超/賣超	-85.23

上漲排名/ 股碼	漲跌(VND)	漲跌%
SGR	2800	6.83%
ORS	900	6.82%
NO1	540	6.79%
QCG	410	6.09%
TCO	950	5.52%

上漲排名/ 股碼	漲跌(VND)	漲跌%
HMR	1300	9.63%
DDG	200	6.90%
NRC	200	6.90%
PSI	400	5.33%
VTZ	800	5.10%

上漲排名/ 股碼	漲跌(VND)	漲跌%
HRT	1190	8.44%
SRT	955	7.58%
BMS	388	4.26%
SBS	222	4.19%
GDA	1102	3.95%

下跌排名/ 股碼	漲跌(VND)	漲跌%
TDP	-1150	-3.18%
DCL	-650	-2.46%
HDC	-500	-1.86%
VHC	-1300	-1.80%
FCN	-200	-1.47%

下跌排名/ 股碼	漲跌(VND)	漲跌%
GKM	-1300	-9.85%
SPI	-400	-9.09%
DL1	-300	-4.17%
MST	-100	-1.82%
VGS	-600	-1.53%

下跌排名/ 股碼	漲跌(VND)	漲跌%
KGM	-753	-8.86%
SBB	-433	-2.32%
HNG	-104	-2.21%
HBC	-98	-1.88%
DSC	-345	-1.44%

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

市值排名/ 股碼	Bil.VND
VCB	514,196,396
BID	283,311,664
FPT	198,474,892
CTG	196,004,699
VHM	189,197,267

市值排名/ 股碼	Bil.VND
PVS	19,309,838
IDC	19,007,996
MBS	17,286,778
HUT	14,726,447
THD	13,667,499

市值排名/ 股碼	Bil.VND
ACV	226,354,952
VGI	200,477,581
MCH	142,400,022
BSR	74,948,377
VEA	59,066,489

交易量排名/ 股碼	成交值	30 日均
VIX	57,102,400	20,304,443
TCB	42,036,400	19,986,520
HPG	38,139,200	22,995,926
VIB	33,995,700	15,279,360
VPB	33,464,208	28,628,608

交易量排名/ 股碼	成交值	30 日均
SHS	363,231,517,200	9,322,491
CEO	121,057,809,400	4,997,039
VFS	5,362,083,000	2,933,418
MBS	149,731,571,100	3,537,349
PVS	146,858,576,500	2,615,724

交易量排 名/股碼	成交值	30 日均
CC1	106,812,000	25,915
AAS	4,231,876,700	242,107
BSR	180,222,395,100	6,700,967
SGB	82,727,269,200	18,086
BCR	18,523,391,800	1,391,097

資料源: Bloomberg & Yuanta Research

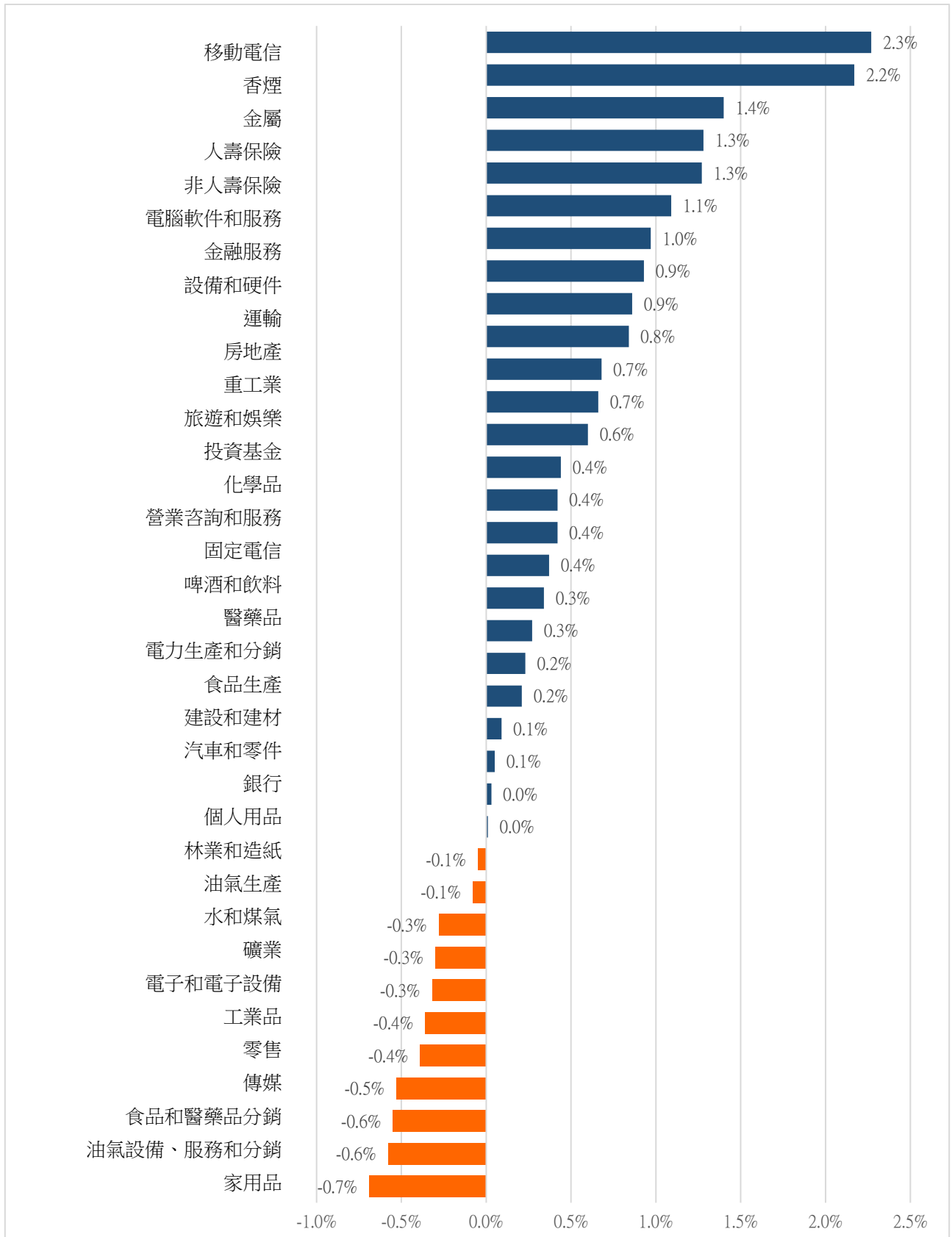
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



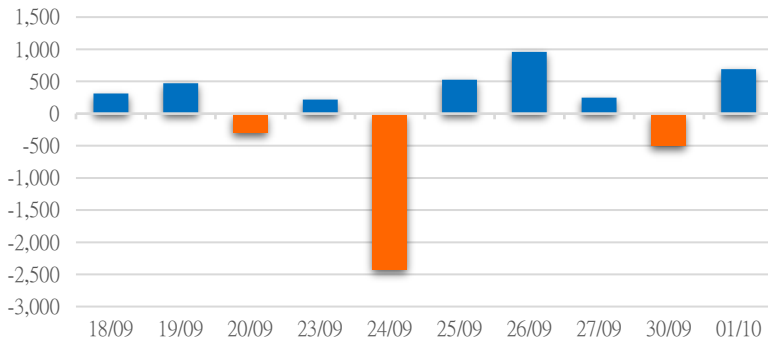
資料源: FiinPro - YSVN



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## 外資買進賣統計

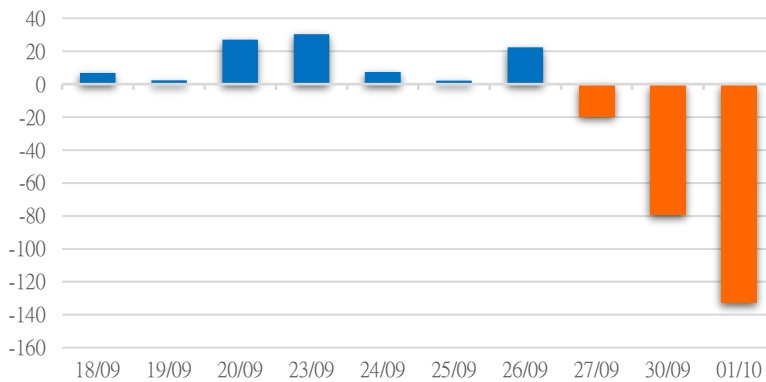
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TCB	360,259	HDB	-94,504
FPT	328,969	VPB	-88,314
VHM	173,556	PC1	-33,215
MWG	163,682	DPM	-31,635
VCG	38,358	VHC	-30,132

HSX 外資買/賣超的前 5 名

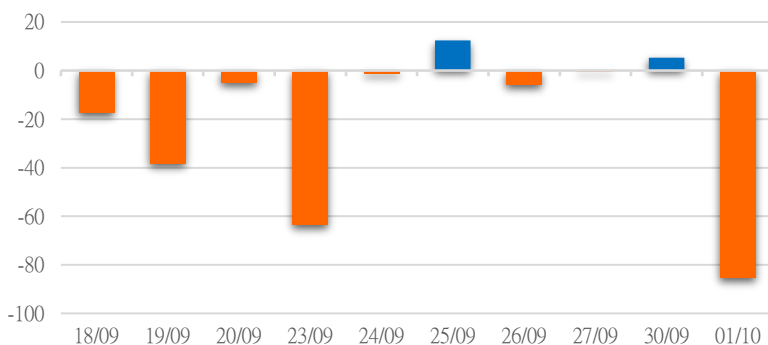
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SHS	9,123	BVS	-79,118
CEO	8,288	PVS	-43,510
DTD	1,559	MBS	-12,668
VTZ	1,137	VCS	-11,255
HUT	1,074	TNG	-5,705

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)
QNS	3,085	SGB	-82,531
HNG	322	OIL	-3,826
CSI	222	VEA	-3,236
ACV	189	MPC	-406
BGE	173	VGI	-174

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)
HPG	62,798	VIB	181,169
MSN	47,039	STB	109,079
VPB	40,689	VIX	78,288
VCB	36,467	MWG	31,810
CTG	30,515	FUEVFNVD	19,948

HSX 自營交易最大前名

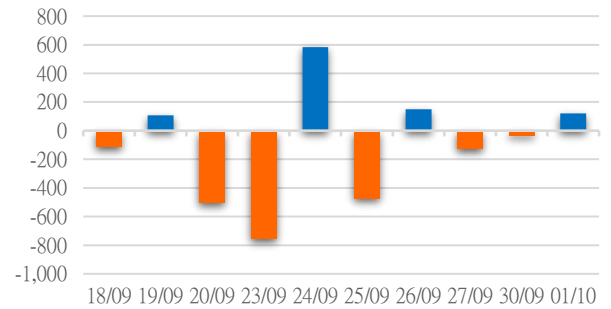
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VFS	80,300	SHS	198,800
PVS	4,199	MBS	1,529
CEO	226	IDC	291
TNG	224		

HNX 自營交易最大前名

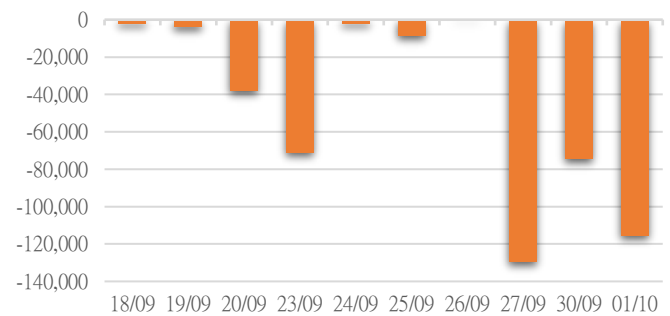
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VGI	996.00	BSR	3,640
BVB	238.00	QTP	1,343
		VCR	121

UPCoM 自營交易最大前名

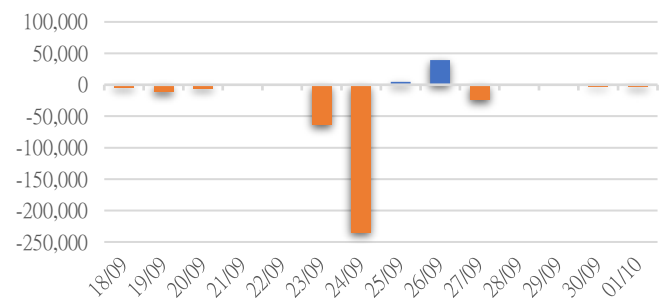
HSX 自營交易每日買/賣超  
(Bil.VND)



HNX 自營交易每日買/賣超  
(Mil.VND)



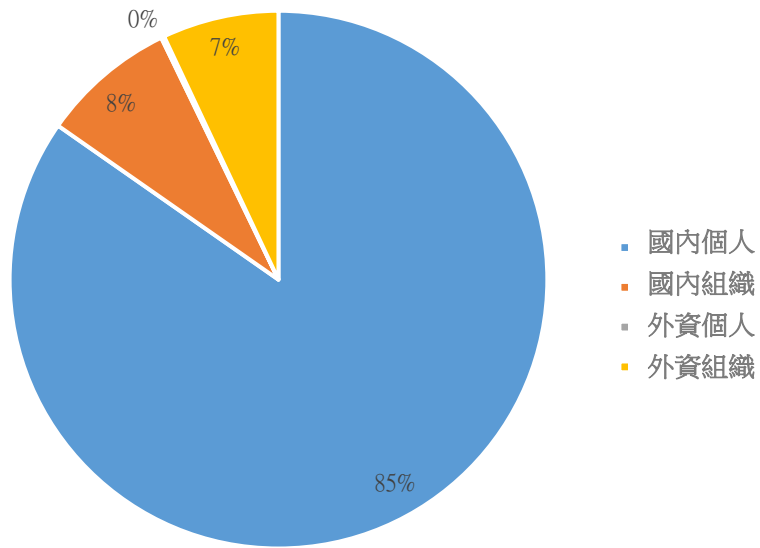
UPCoM 自營交易每日買/賣超  
(Mil.VND)





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### 越南證券市場投資人類別統計

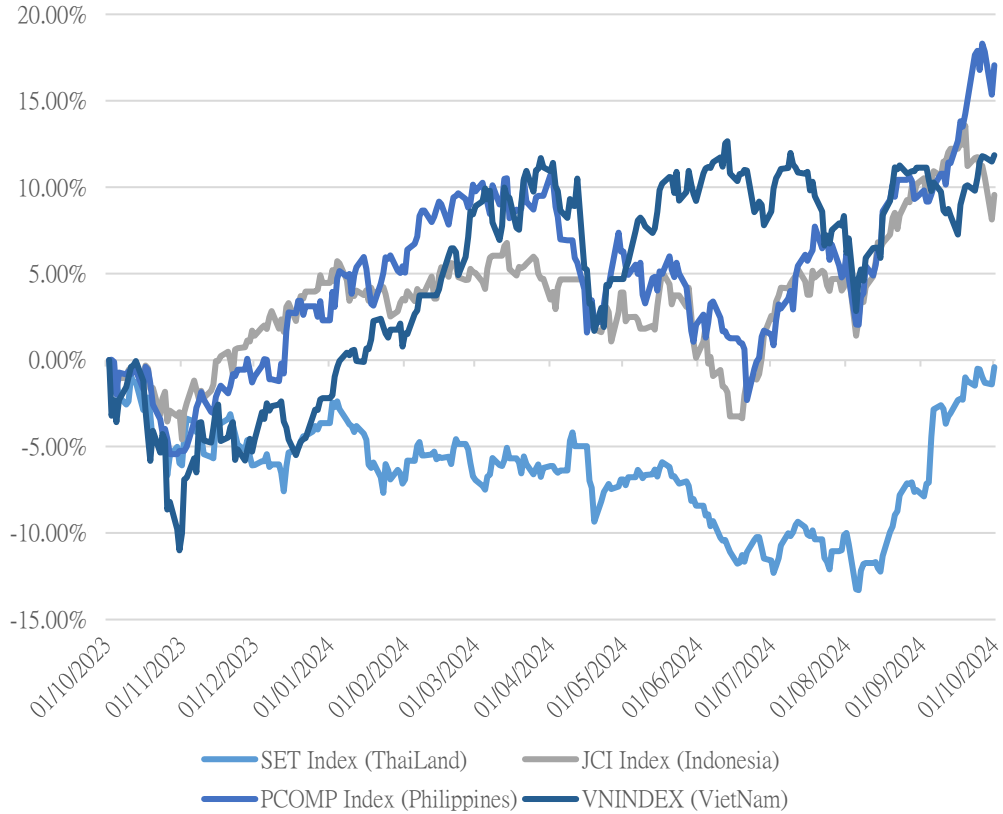


資料源: FiinPro - YSVN



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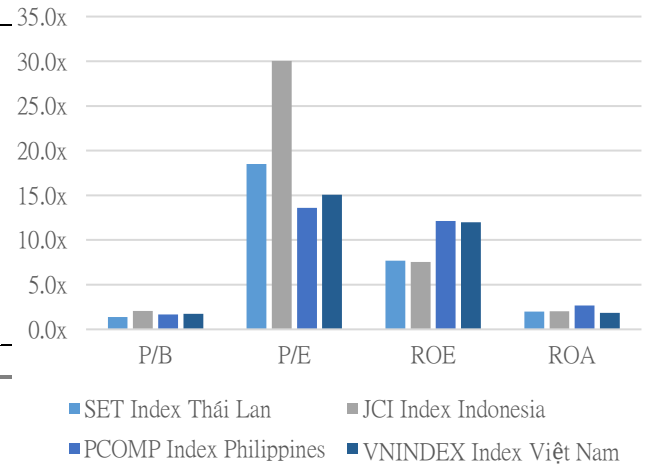
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.1x	1.7x	1.7x
P/E		18.5x	30.1x	13.6x	15.1x
ROE	%	7.68	7.53	12.14	11.99
ROA	%	2.00	2.03	2.68	1.85
Vốn hóa	Tỷ USD	550.11	827.49	177.57	215.08
GTGD	Triệu USD	1.54	0.96	0.10	0.61
LS cổ tức	%	3.25	3.14	2.58	1.80

源: Bloomberg & YSVN



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





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## Appendix A: Important Disclosures

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