

當日市場：上漲動能收窄至尾盤的交易日

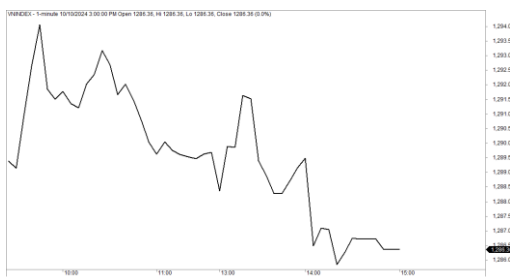
2024/10/11

市場走勢

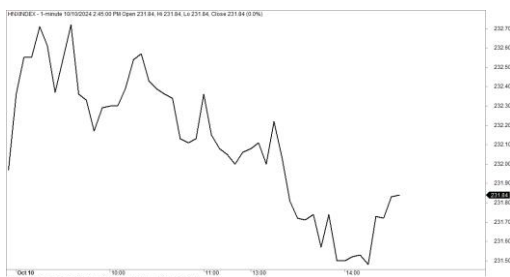
市場指數	VNI	HNI	UPCOM
收盤	1,286.36	231.29	92.57
%日	0.35%	-0.21%	0.13%
%週	0.65%	-0.88%	-0.12%
%月	2.48%	-0.17%	0.23%
%年	12.47%	-1.23%	5.85%
成交值(Bil.VND)			
當日	18,418	938	1,136
日均量/週	15,333	1,119	711
日均量/月	16,750	1,178	710
外資進出			
買進	2,157.17	18.97	20.25
賣出	1,654.16	44.61	41.50
買賣超	503.01	-25.64	-21.25
市場漲跌家數			
上漲	136	62	179
下跌	176	80	139
持平	103	173	585
市場指標			
P/E	14.16	16.08	27.68
總市值 (兆盾)	5,260	326	1,438
股息殖利 ²	2.22%	3.13%	4.23%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在連續第二個交易日繼續大幅上漲，但因在尾盤的交易日出現獲利壓力，上漲動能相當收窄。VN-Index 在創下超過 1294 點的最高水平後收窄漲幅，止於 1286.36 點，相當於上漲 0.35%。HNX-Index 下跌 0.21%，Upcom-Index 上漲 0.13%。3 大市場的交易額持續增加，達到 20 兆 4,930 億越南盾。

FPT (4.65%)、MSN (3.9%)、VPB (1.48%) 是直到盤尾交易日仍維持高水準的股票，當市場可以預期該股的第三季度業務業績。此外，HDB (1.67%)、MWG (1.25%)、SAB (2.3%)、BVH (1.5%) 均積極走勢。相反，STB (-1.61%)、HPG (-0.91%)、ACB (-0.19%) 再次調整。

證券股繼續走弱於大盤，價格同步下跌。相反，科技股是亮點，CMG (4.9%)。

外資反轉買超，價值近 4,590 億越南盾，集中在 MSN (3,670 億)、FPT (3,120 億)、NTL (1,580 億)。相反，STB (1,260 億)、CTG (490 億)、VPB (490 億) 在賣超方面的榜首。

市場短期觀點

我們認為市場可能會在交易日出現調整期，並在下一交易日維持上漲。同時，我們注意到市場仍處於短期調整階段，因此 VN-Index 在接下來的幾個交易日可能尚未快速突破 1,295 點。此外，各類股票之間的分化可能會在接下來的幾個交易日繼續出現。

大盤的短期走勢仍維持中性，其中科技股確認短期上漲趨勢。因此，我們建議投資者在短期投資組合繼續持有 40-50% 的股票比例，並僅應考慮較低的買進新股。

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

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1286.36	0.35%
VN30	1360.58	0.64%
VN Mid	1924.62	-0.43%
VN Small	1412.78	-0.14%

河內交易所 (HSX)

	收盤	漲跌%
HNI	231.29	-0.21%
HN30	503.26	-0.46%
VNX AllSh	1346.55	0.34%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	92.57	0.13%

外資交易	成交值 (Bil.VND)
買進	2157.17
賣出	1654.16
買超/賣超	503.01

外資交易	成交值 (Bil.VND)
買進	18.97
賣出	44.61
買超/賣超	-25.64

外資交易	成交值 (Bil.VND)
買進	20.25
賣出	41.50
買超/賣超	-21.25

上漲排名/股碼	漲跌(VND)	漲跌%
VFG	4000	5.63%
CMG	2500	4.90%
FPT	6300	4.65%
MSN	3000	3.90%
APG	320	3.27%

上漲排名/股碼	漲跌(VND)	漲跌%
CTP	3000	8.82%
MST	200	3.64%
DXP	300	2.59%
PVI	1000	2.17%
CAP	1000	2.09%

上漲排名/股碼	漲跌(VND)	漲跌%
FOX	3755	4.31%
ABI	761	3.04%
TTN	394	2.81%
MSR	342	2.78%
FOC	2303	2.75%

下跌排名/股碼	漲跌(VND)	漲跌%
ACC	-650	-4.38%
DBD	-2000	-4.08%
CTF	-850	-2.76%
VCI	-1000	-2.67%
DVP	-1700	-2.25%

下跌排名/股碼	漲跌(VND)	漲跌%
AMV	-200	-8.33%
AAV	-200	-3.39%
VTZ	-400	-2.31%
MBS	-600	-1.99%
VGS	-600	-1.57%

下跌排名/股碼	漲跌(VND)	漲跌%
LTG	-1347	-11.61%
VNA	-956	-3.58%
TT6	-338	-3.07%
HAC	-325	-2.93%
DRI	-228	-1.90%

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

市值排名/股碼	Bil.VND
VCB	508,607,305
BID	281,886,555
FPT	197,744,668
CTG	193,856,702
VHM	185,060,618

市值排名/股碼	Bil.VND
PVS	19,740,008
IDC	18,611,996
MBS	16,466,203
HUT	14,726,447
THD	13,590,499

市值排名/股碼	Bil.VND
ACV	233,369,087
VGI	201,150,263
MCH	143,339,152
BSR	75,004,186
VEA	58,041,984

交易量排名/股碼	成交值	30 日均
VPB	45,962,500	33,640,745
TPB	34,599,801	24,537,098
EIB	29,469,600	15,495,439
VIX	27,572,900	23,234,908
HPG	23,887,145	25,024,730

交易量排名/股碼	成交值	30 日均
BAB	58,567,400	452,050
MBS	176,673,267,400	4,481,482
SHS	73,784,987,300	12,122,583
HUT	39,397,817,400	2,830,948
PVS	125,594,624,500	3,098,814

交易量排名/股碼	成交值	30 日均
TLP	50,570,000	2,931
VNA	918,806,800	636,825
AAS	776,363,200	598,685
BSR	137,835,123,700	6,892,885
HNG	9,187,636,500	0

資料源: Bloomberg & Yuanta Research

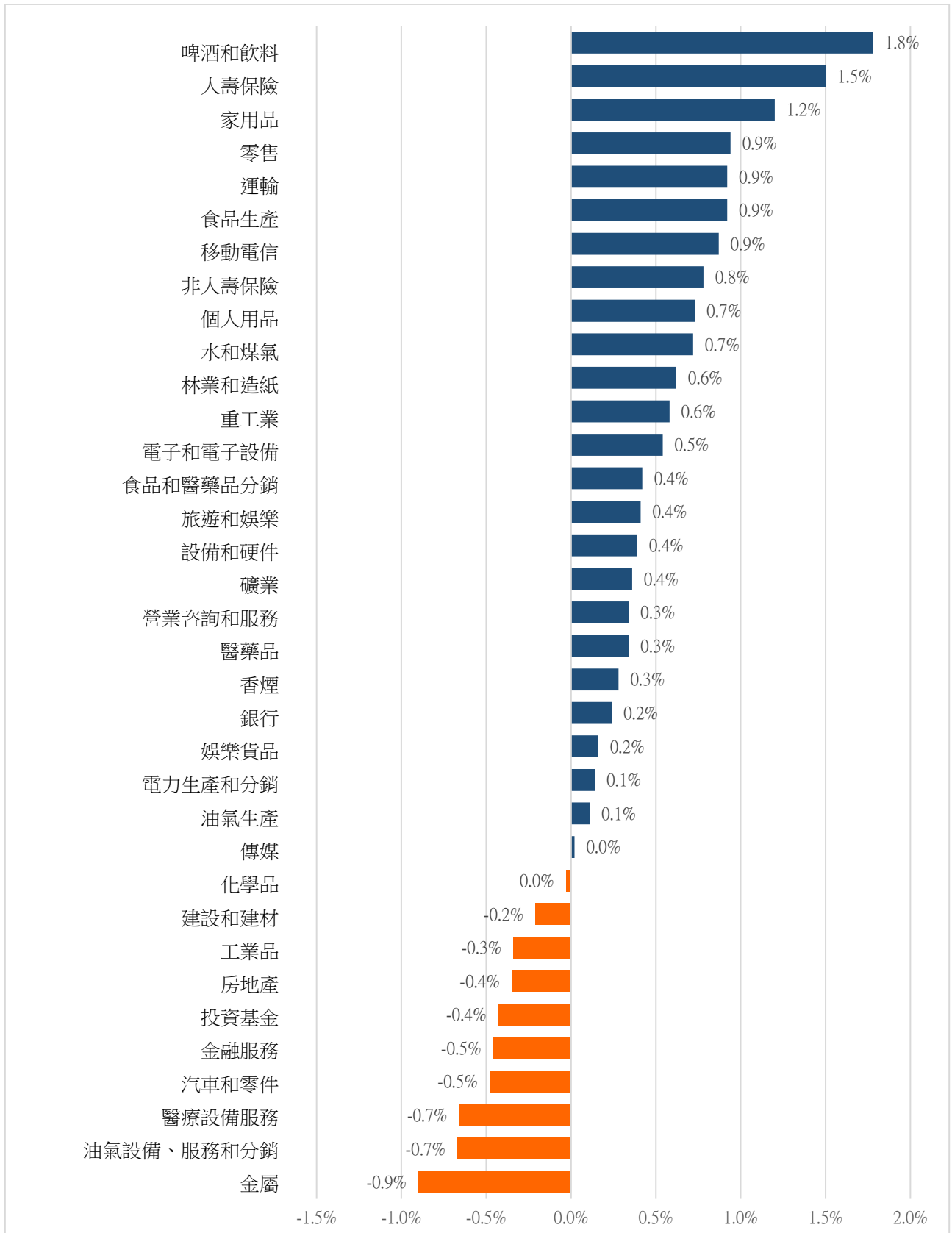
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



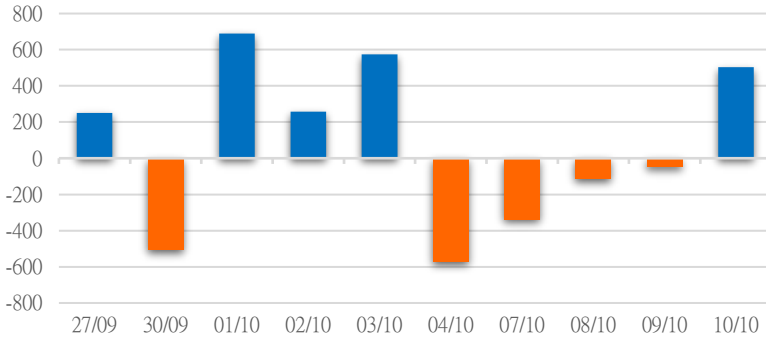
資料源: FinPro - YSVN



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外資買進賣統計

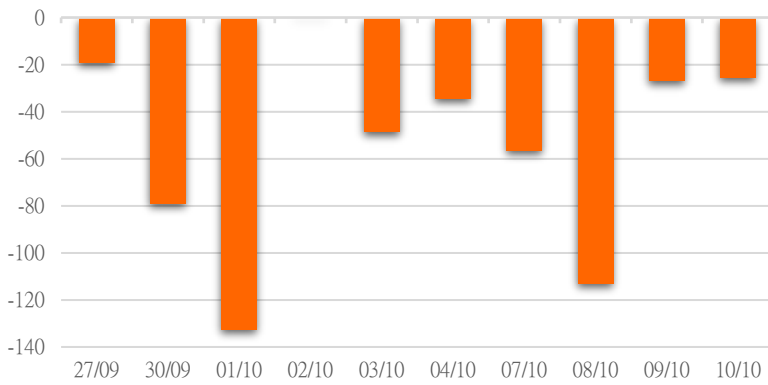
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MSN	365,782	STB	-126,772
FPT	310,877	CTG	-49,249
NTL	159,071	VPB	-49,142
TCB	135,758	HCM	-33,728
CMG	20,862	MSB	-33,431

HSX 外資買/賣超的前 5 名

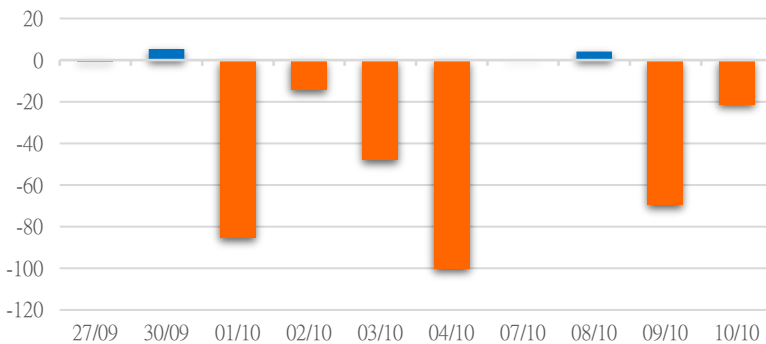
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VC3	2,407	SHS	-16,454
TIG	1,011	MBS	-5,713
VFS	1,008	PVS	-5,701
HUT	999	TNG	-2,107
PRE	959	IDC	-1,693

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	7,271	LTG	-21,706
MCH	4,028	BSR	-9,624
ACV	824	ABI	-1,369
OIL	381	HBC	-873
GHC	240	VEA	-251

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

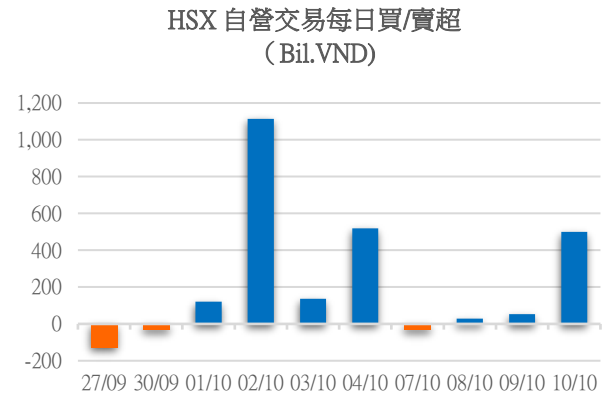


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自營統計

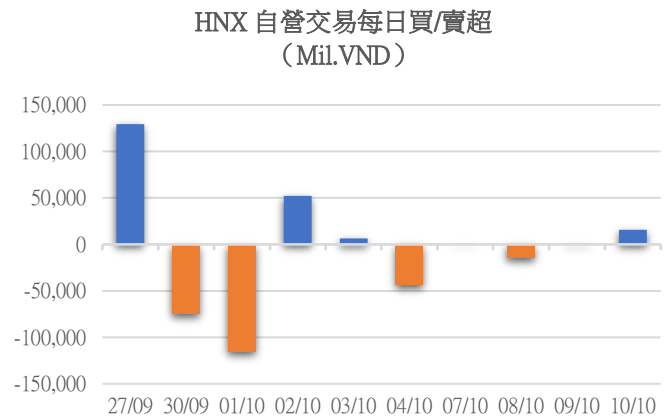
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
EIB	249,084	NTL	101,950
VPB	62,264	FPT	37,910
HAH	43,220	MSB	27,865
TCB	43,010	VHM	24,731
ACB	33,829	VIB	14,648

HSX 自營交易最大前名



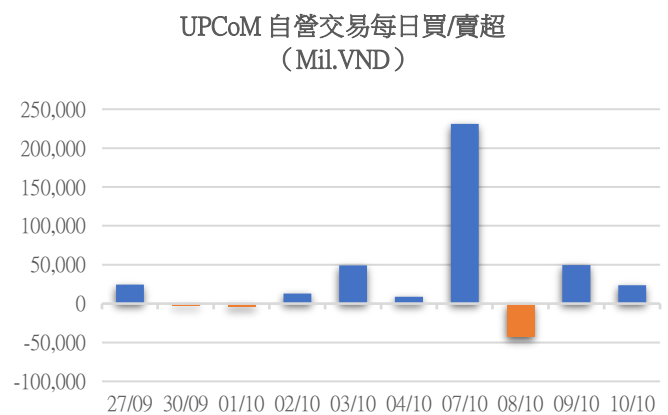
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	14,059		
PVS	1,648		

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)
BSR	23,474.00		
QNS	146.40		

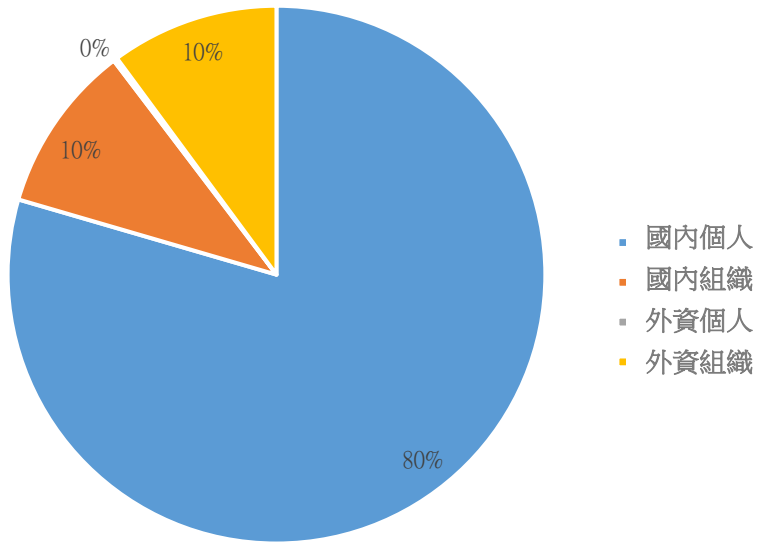
UPCoM 自營交易最大前名





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越南證券市場投資人類別統計

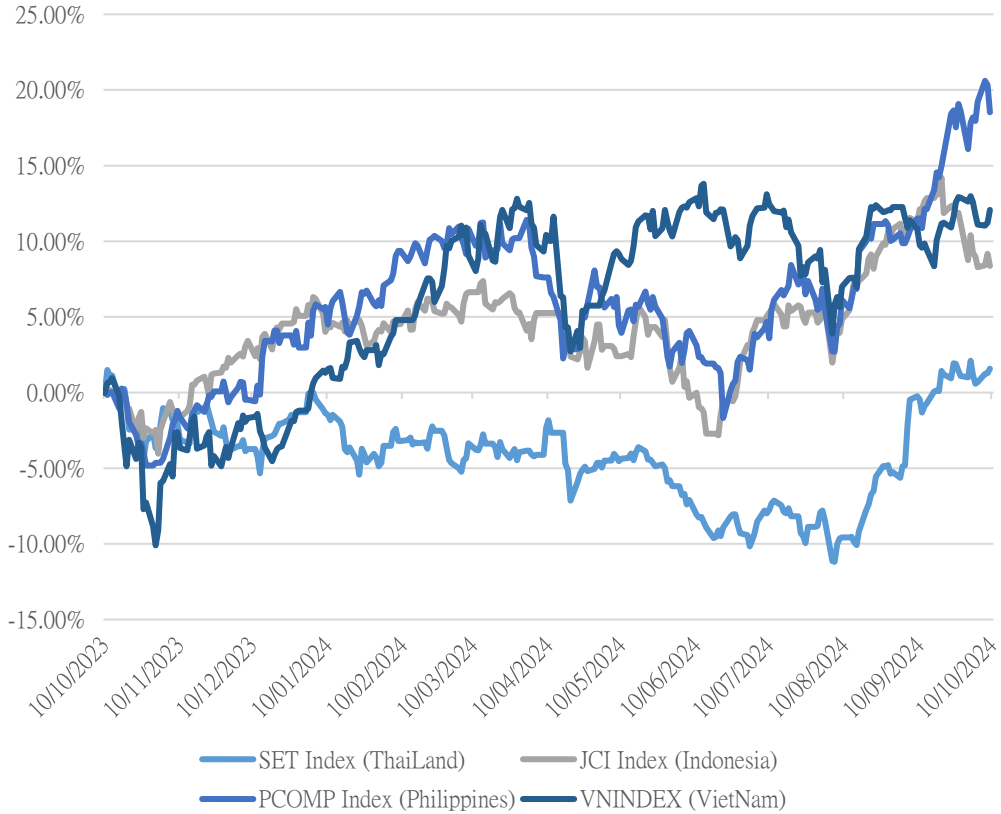


資料源: FiinPro - YSVN



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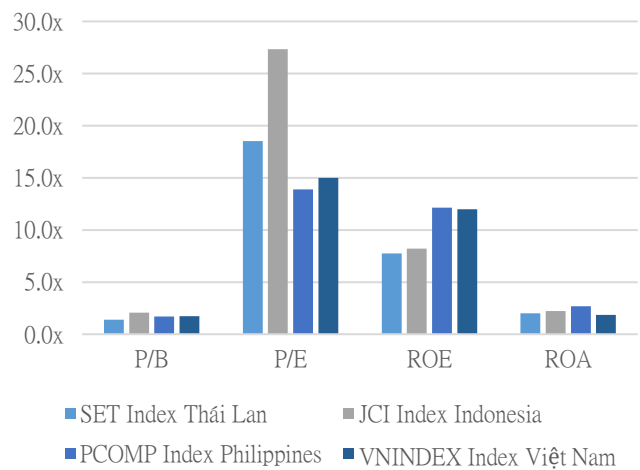
東南亞主要市場走勢比較



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	27.3x	13.9x	15.0x
ROE	%	7.76	8.20	12.14	11.98
ROA	%	1.99	2.21	2.68	1.85
Vốn hóa	Tỷ USD	537.90	800.73	177.37	211.98
GTGD	Triệu USD	1.28	0.60	0.07	0.64
LS cổ tức	%	3.18	3.11	2.56	1.78

源: Bloomberg & YSVN





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