

當日市場：大幅上漲的交易日，流動性改善

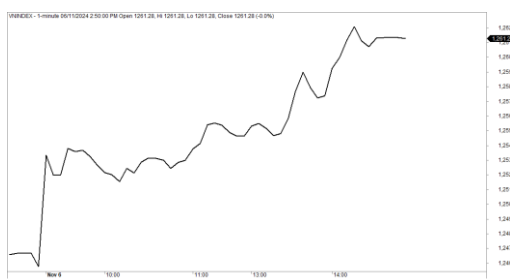
2024/11/07

市場走勢

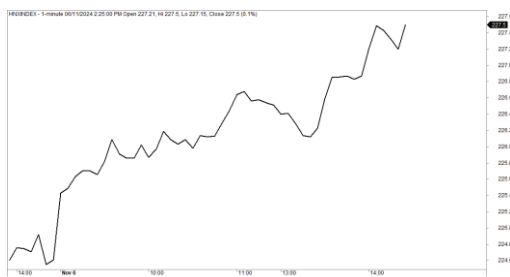
市場指數	VNI	HNI	UPCOM
收盤	1,261.28	227.76	92.71
%日	1.25%	1.29%	0.88%
%週	-1.27%	-0.31%	-0.46%
%月	-1.96%	-3.36%	-0.51%
%年	15.69%	3.27%	9.20%
<b>成交值(Bil.VND)</b>			
當日	14,156	988	696
日均量/週	14,455	754	551
日均量/月	15,191	876	677
<b>外資進出</b>			
買進	1,040.61	35.50	12.32
賣出	1,425.12	109.52	10.09
買賣超	-384.50	-74.02	2.23
<b>市場漲跌家數</b>			
上漲	266	115	189
下跌	58	36	109
持平	91	165	605
<b>市場指標</b>			
P/E	13.17	15.39	30.49
總市值 (兆盾)	5,211	321	1,470
股息殖利 <sup>2</sup>	2.69%	2.84%	4.10%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

在區域和世界股指走勢相當積極的背景下，市場在盤初的交易日復甦，並寬幅上漲至尾盤的交易日。VN-Index 收盤上漲 1.25%，止於 1,261.28 點。HNX-Index 同步上漲 1.29%，Upcom-Index 上漲 0.87%。3 大市場的交易額均有所改善，並增加至 15 兆 8,400 億越南盾。

銀行股佔主導地位，有 CTG (2.43%)、TCB (1.92%)、TPB (2.42%)、MBB (1.64%)、ACB (1.41%)、BID (1.37%) 等。此外，FPT (1.51%)、GVR (5.14%)、HPG (1.7%)、MSN (1.5%)、VIC (1.21%)、VRE (1.69%) 同步上漲。VN30-Index 收盤上漲 1.23%，其中有 29 檔上漲股和 1 檔參考股。

然而，當日的重點一定是產業園地產股如 KBC、SZC、SIP 以及 LDG、QCG、VGC 漲停。相反，HVN (-1.1%)、VTP (-0.42%)、CIG (-3.69%)、FIR (-6.4%) 等逆市而行。

外資繼續延續賣超勢頭，價值達到 4,560 億越南盾，主要集中在 VHM (1,500 億)、MSN (1,340 億) 和 IDC (680 億)。相反，HPG (430 億)、TCB (370 億)、STB (260 億) 在買超方面的榜首。

市場短期觀點

我們認為市場在下一交易日可能會繼續上漲，VN-Index 可能會重新測試 1,267 點的阻力位。同時，市場出現進入短期調整階段的跡象，顯示短期風險出現下跌的跡象，積極點的是流動性和高價水平的短期需求比前一交易日相當改善。此外，短期情緒指標持續上漲，顯示投資者對當前市場走勢的悲觀情緒走弱。

大盤的短期走勢仍維持下跌。因此，我們建議投資者繼續在短期投資組合持有 30-40% 的低比例股票，並低比例的買進新股以探索短期趨勢。

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

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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1261.28	1.25%
VN30	1329.56	1.23%
VN Mid	1886.8	1.53%
VN Small	1408.9	1.34%

河內交易所 (HSX)

	收盤	漲跌%
HNI	227.76	1.29%
HN30	491.27	1.91%
VNX AllSh	1318.04	1.32%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	92.71	0.88%

外資交易	成交值 (Bil.VND)
買進	1040.61
賣出	1425.12
買超/賣超	-384.50

外資交易	成交值 (Bil.VND)
買進	35.50
賣出	109.52
買超/賣超	-74.02

外資交易	成交值 (Bil.VND)
買進	12.32
賣出	10.09
買超/賣超	2.23

上漲排名/股碼	漲跌(VND)	漲跌%
VGC	2800	7.00%
SZC	2700	6.99%
SIP	5100	6.89%
KBC	1850	6.85%
QCG	850	6.64%

上漲排名/股碼	漲跌(VND)	漲跌%
DTD	2200	8.84%
TFC	2800	8.75%
SGH	2500	8.62%
IDC	2500	4.50%
MBS	1100	3.90%

上漲排名/股碼	漲跌(VND)	漲跌%
OIL	338	3.02%
MFS	797	2.67%
TVN	162	2.28%
HNG	109	2.22%
VEA	999	2.22%

下跌排名/股碼	漲跌(VND)	漲跌%
FIR	-320	-6.40%
CIG	-300	-3.69%
TLD	-170	-2.83%
VFG	-2000	-2.25%
KHP	-250	-1.85%

下跌排名/股碼	漲跌(VND)	漲跌%
NRC	-100	-2.27%
TVC	-100	-0.92%
DL1	0	0.00%
DNP	0	0.00%
DXP	0	0.00%

下跌排名/股碼	漲跌(VND)	漲跌%
BCR	-112	-2.04%
APF	-422	-0.79%
QTP	-76	-0.55%
VLC	-87	-0.51%
AMS	-44	-0.45%

市值排名/股碼	Bil.VND
VCB	517,549,851
BID	270,200,662
FPT	195,063,774
CTG	188,218,211
VHM	180,706,251

市值排名/股碼	Bil.VND
IDC	18,314,996
PVS	18,019,329
MBS	15,426,808
HUT	14,458,694
THD	13,590,499

市值排名/股碼	Bil.VND
ACV	247,292,862
VGI	219,699,249
MCH	155,004,371
BSR	64,809,743
VEA	59,987,347

交易量排名/股碼	成交值	30 日均
HPG	22,375,500	18,238,761
KBC	20,298,300	3,342,028
TCB	18,270,201	14,442,660
DXG	17,459,500	15,495,482
VPB	16,255,901	24,869,790

交易量排名/股碼	成交值	30 日均
SHS	5,040,337	10,789,896
IDC	4,098,551	844,380
TNG	3,576,250	1,446,620
MBS	3,315,882	3,064,706
DTD	3,057,641	438,741

交易量排名/股碼	成交值	30 日均
HNG	10,653,692	3,028,651
VCR	5,104,000	2,027,816
BSR	2,358,263	4,686,039
VEA	2,224,268	476,257
NED	1,668,604	461,205

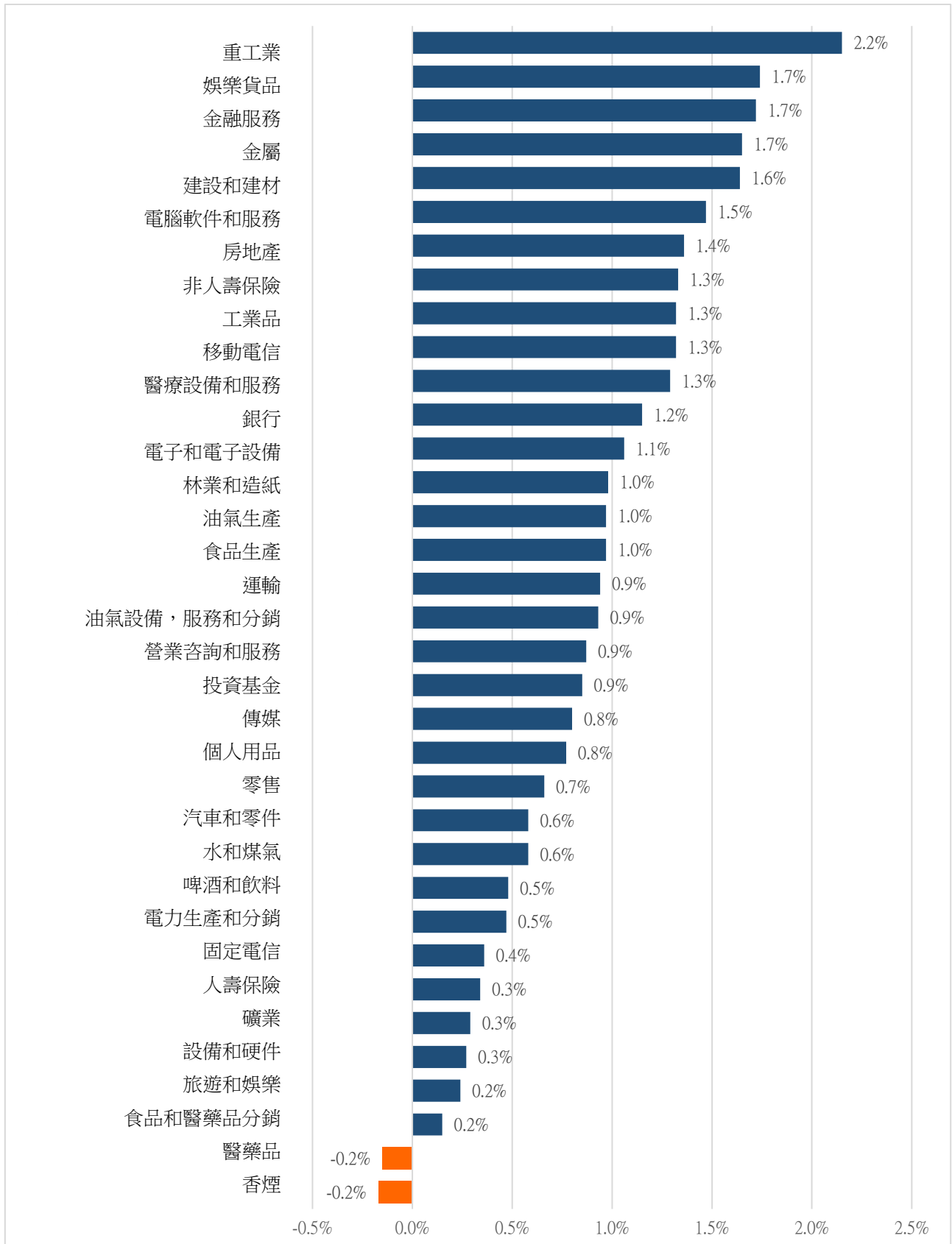
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



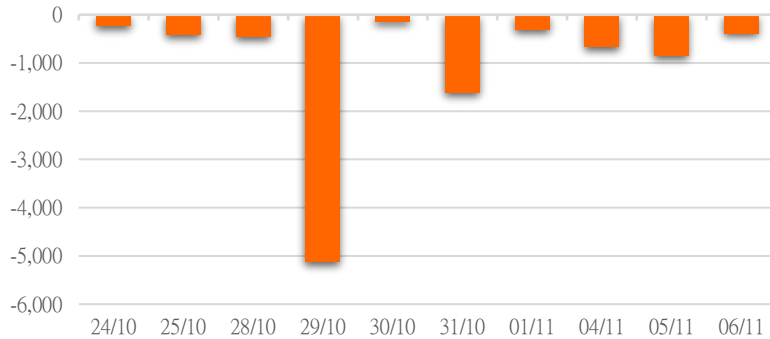
資料源: FiinPro - YSVN



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## 外資買進賣統計

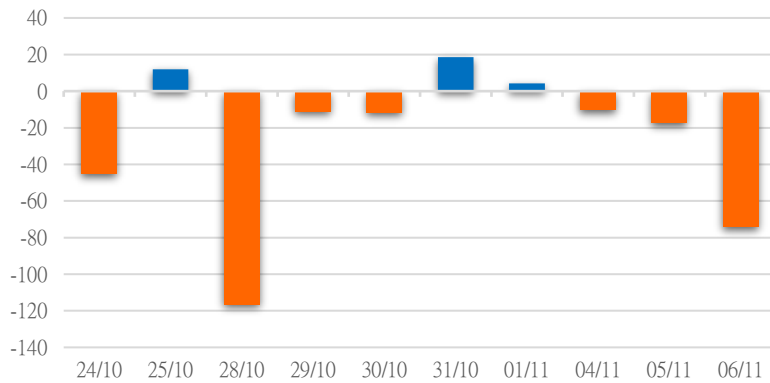
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
HPG	42,541	VHM	-150,052
TCB	36,502	MSN	-134,490
STB	25,619	SSI	-67,190
KBC	20,623	VCB	-51,850
VND	19,529	DBC	-51,242

HSX 外資買/賣超的前 5 名

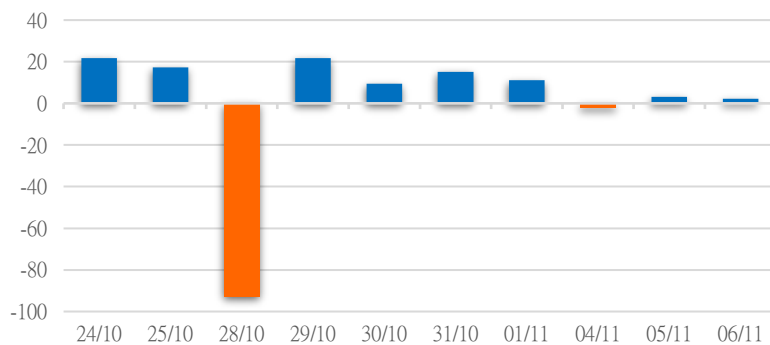
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BVS	2,153	IDC	-68,207
DTD	1,428	PVS	-13,356
CEO	1,374	MBS	-2,227
NTP	1,341	VC3	-343
TNG	1,281	PVI	-264

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	4,515	ACV	-1,878
OIL	2,767	DGT	-1,855
ABW	435	QTP	-1,568
ABI	319	VRG	-707
VEA	295	CST	-228

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

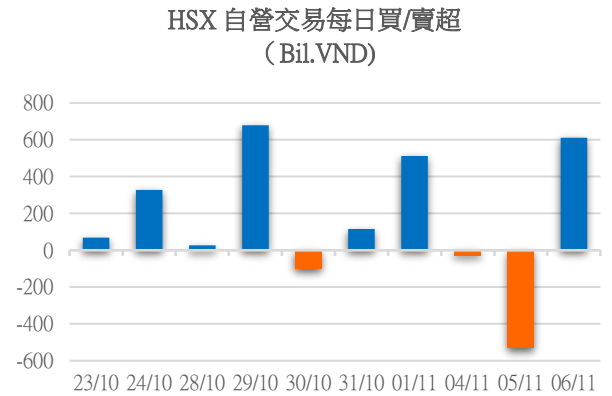


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## 自營統計

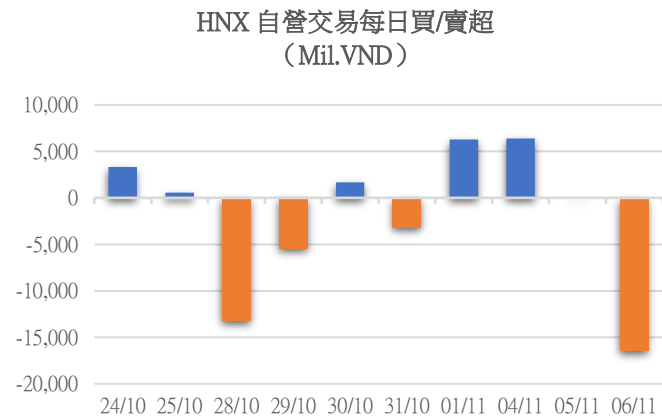
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MWG	64,799	HCM	19,010
HPG	62,481	DRC	15,604
VTP	60,503	KBC	6,669
FPT	57,167	FUEVFNVD	6,560
TCB	51,383	EIB	2,204

HSX 自營交易最大前名



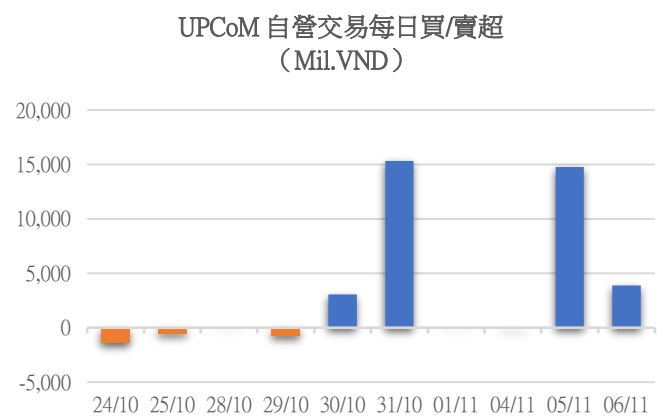
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
		MBS	11,927
		VC2	4,188
		DVM	174
		VC7	85
		KHS	70

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)
MCH	3,870.00		

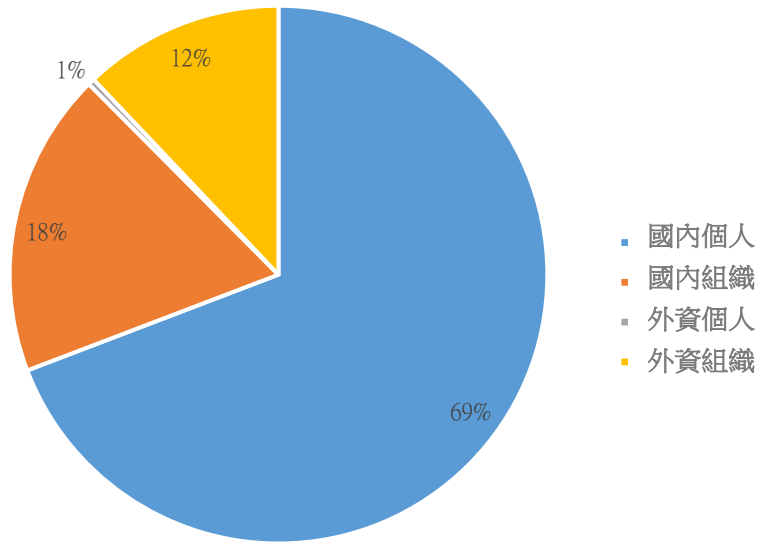
UPCoM 自營交易最大前名





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### 越南證券市場投資人類別統計

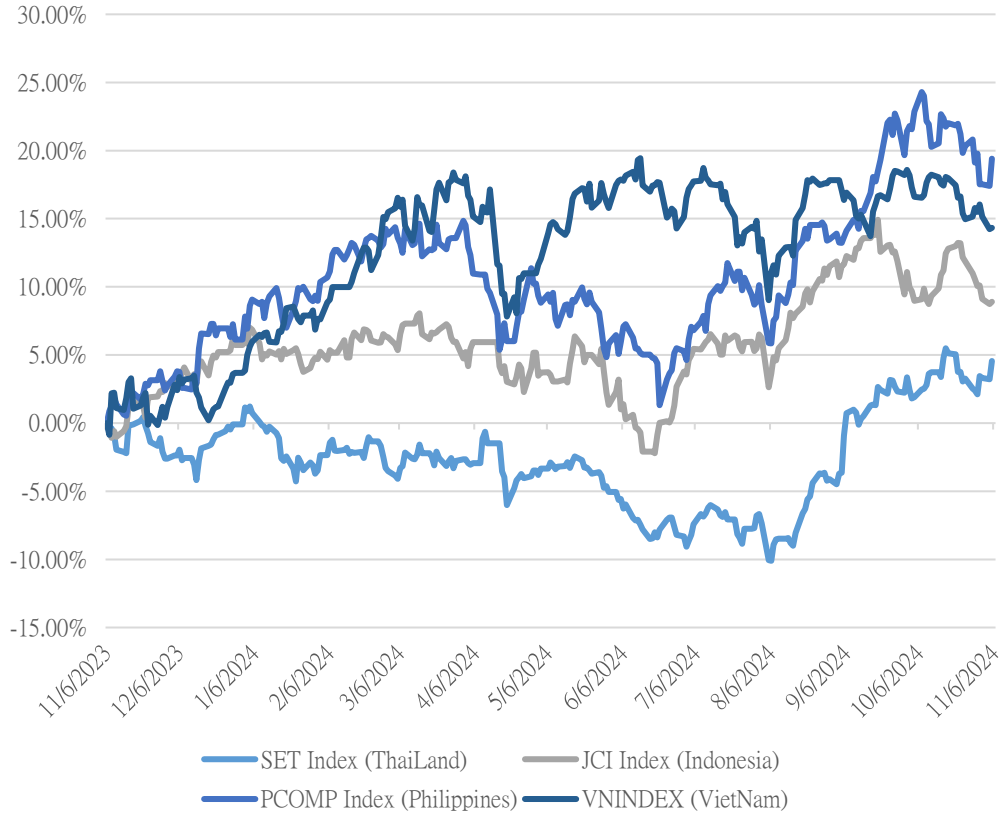


資料源: FiinPro - YSVN



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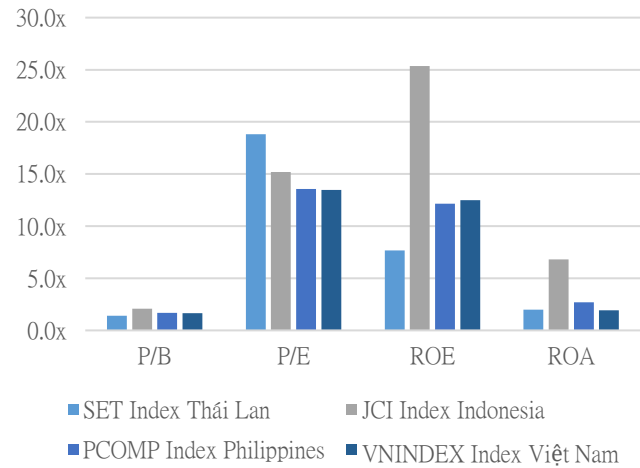
### 東南亞主要市場走勢比較



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		18.8x	15.2x	13.6x	13.5x
ROE	%	7.66	25.35	12.16	12.50
ROA	%	1.99	6.80	2.68	1.93
Vốn hóa	Tỷ USD	538.42	792.34	169.42	202.03
GTGD	Triệu USD	1.05	0.66	0.06	0.32
LS cổ tức	%	3.19	3.17	2.61	1.82

源: Bloomberg & YSVN







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## 聯繫方式

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