

當日市場：中型股為亮點

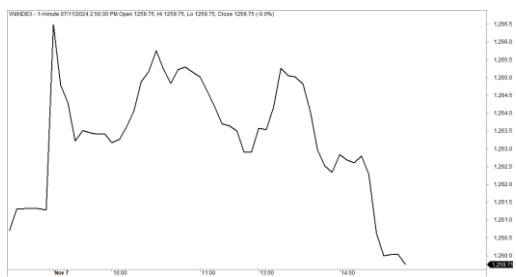
2024/11/08

市場走勢

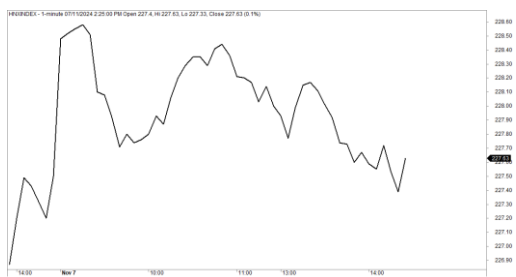
市場指數	VNI	HNI	UPCOM
收盤	1,259.75	227.49	92.32
%日	-0.12%	-0.12%	-0.42%
%週	-0.37%	0.50%	-0.06%
%月	-0.80%	-2.14%	-0.16%
%年	16.61%	4.21%	9.11%
成交值(Bil.VND)			
當日	12,462	723	661
日均量/週	13,641	779	588
日均量/月	15,175	863	682
外資進出			
買進	1,503.21	18.31	11.21
賣出	1,893.82	44.45	14.19
買賣超	-390.61	-26.14	-2.98
市場漲跌家數			
上漲	147	59	179
下跌	158	81	140
持平	110	176	584
市場指標			
P/E	13.16	15.36	31.02
總市值 (兆盾)	5,206	321	1,495
股息殖利 ²	2.68%	2.83%	4.14%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在盤初的交易日小幅上漲，但當缺乏領漲的股票，市場再次逐步走弱。VN-Index 收盤下跌 0.12%，止於 1,259.75 點。HNX-Index 也下跌 0.12%，Upcom-Index 下跌 0.42%。3 大市場的交易額均有所改善，並增加至 21 兆 2,020 億越南盾。

銀行股出現分化並走弱，STB 和 VCB 小幅上漲，而其餘大部分股票收盤於參考或下跌。此外，FPT (0.37%)、PLX (0.37%)、VNM (0.15%) 收盤小幅上漲。GVR (-1.19%)、MSN (-1.21%) 出現強勁拋售壓力，這是 VN30-Index 中大幅下跌的兩檔藍籌股。

房地產股吸引更多積極的現金流，如 NVL (3.85%)、DXS (6.87%)、PDR (1.88%)、DIG (0.95%) 等。中盤幸股也更積極如 HAH (3.26%)、HVN (3.1%)、CMG (3.52%)、VTP (6.91%) 等。

外資持續延續賣超勢頭，賣超價值達到 2,240 億越南盾，主要集中在 FUEVFNVD (1,000 億)、KDH (690 億)、VRE (510 億)。相反，MWG (770 億)、TCB (650 億)、BVH (600 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維持上漲勢頭，VN-Index 可能會繼續測試 1,267 點的阻力位。積極點的是，VNMidcaps 和 VNSmallcaps 指數形成上漲趨勢反轉模式，顯示短期風險持續逐步下跌。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。

大盤的短期趨勢維持下跌，VNSmallcaps 指數的短期趨勢調整至上漲。因此，我們建議投資者可以在短期投資組合繼續持有 30-40% 的股票比例，並可以考慮較低比例的買進新股以探索短期走勢。

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	1259.75	-0.12%
VN30	1326.65	-0.22%
VN Mid	1887.67	0.05%
VN Small	1413.62	0.34%

河內交易所 (HSX)

	收盤	漲跌%
HNI	227.49	-0.12%
HN30	489.98	-0.26%
VNX AllSh	1316.75	-0.10%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	92.32	-0.42%

外資交易	成交值 (Bil.VND)
買進	1503.21
賣出	1893.82
買超/賣超	-390.61

外資交易	成交值 (Bil.VND)
買進	18.31
賣出	44.45
買超/賣超	-26.14

外資交易	成交值 (Bil.VND)
買進	11.21
賣出	14.19
買超/賣超	-2.98

上漲排名/股碼	漲跌(VND)	漲跌%
TTF	210	6.91%
VTP	6600	6.91%
CIG	540	6.90%
DXS	400	6.87%
CTF	2050	6.78%

上漲排名/股碼	漲跌(VND)	漲跌%
VC7	200	2.30%
NDN	100	1.11%
PVB	300	1.07%
L14	200	0.73%
VGS	100	0.29%

上漲排名/股碼	漲跌(VND)	漲跌%
MFS	1798	5.86%
VGI	3949	5.39%
TTN	647	4.20%
ACV	4207	3.69%
FOX	3284	3.67%

下跌排名/股碼	漲跌(VND)	漲跌%
NAF	-400	-1.87%
LHG	-650	-1.74%
PET	-450	-1.68%
FRT	-2500	-1.45%
PAN	-350	-1.44%

下跌排名/股碼	漲跌(VND)	漲跌%
GKM	-500	-7.94%
NRC	-200	-4.65%
VC2	-400	-4.12%
VFS	-400	-2.67%
VTZ	-400	-2.42%

下跌排名/股碼	漲跌(VND)	漲跌%
ISH	-792	-2.96%
DVN	-574	-2.55%
VEA	-201	-0.44%
DDV	-64	-0.38%
VLC	-29	-0.17%

市值排名/股碼	Bil.VND
VCB	519,226,578
BID	273,905,945
FPT	198,005,912
CTG	192,782,704
VHM	180,923,969

市值排名/股碼	Bil.VND
IDC	19,139,996
PVS	18,210,516
MBS	16,028,563
HUT	14,458,694
THD	13,590,499

市值排名/股碼	Bil.VND
ACV	248,372,629
VGI	222,654,789
MCH	157,400,748
BSR	65,547,662
VEA	61,256,351

交易量排名/股碼	成交值	30 日均
DXG	22,781,700	15,580,996
NVL	18,172,883	5,612,576
HPG	16,181,001	18,419,182
VHM	16,125,700	17,641,915
KBC	14,199,160	4,079,520

交易量排名/股碼	成交值	30 日均
CEO	7,346,398	3,815,055
SHS	4,571,158	10,539,915
VFS	2,505,244	909,007
MBS	2,102,951	3,075,626
DL1	1,986,131	1,044,433

交易量排名/股碼	成交值	30 日均
HNG	3,205,973	3,360,174
VGI	3,147,688	1,189,068
BSR	2,075,760	4,584,832
VCR	1,700,805	2,161,563
BVB	982,115	1,517,683

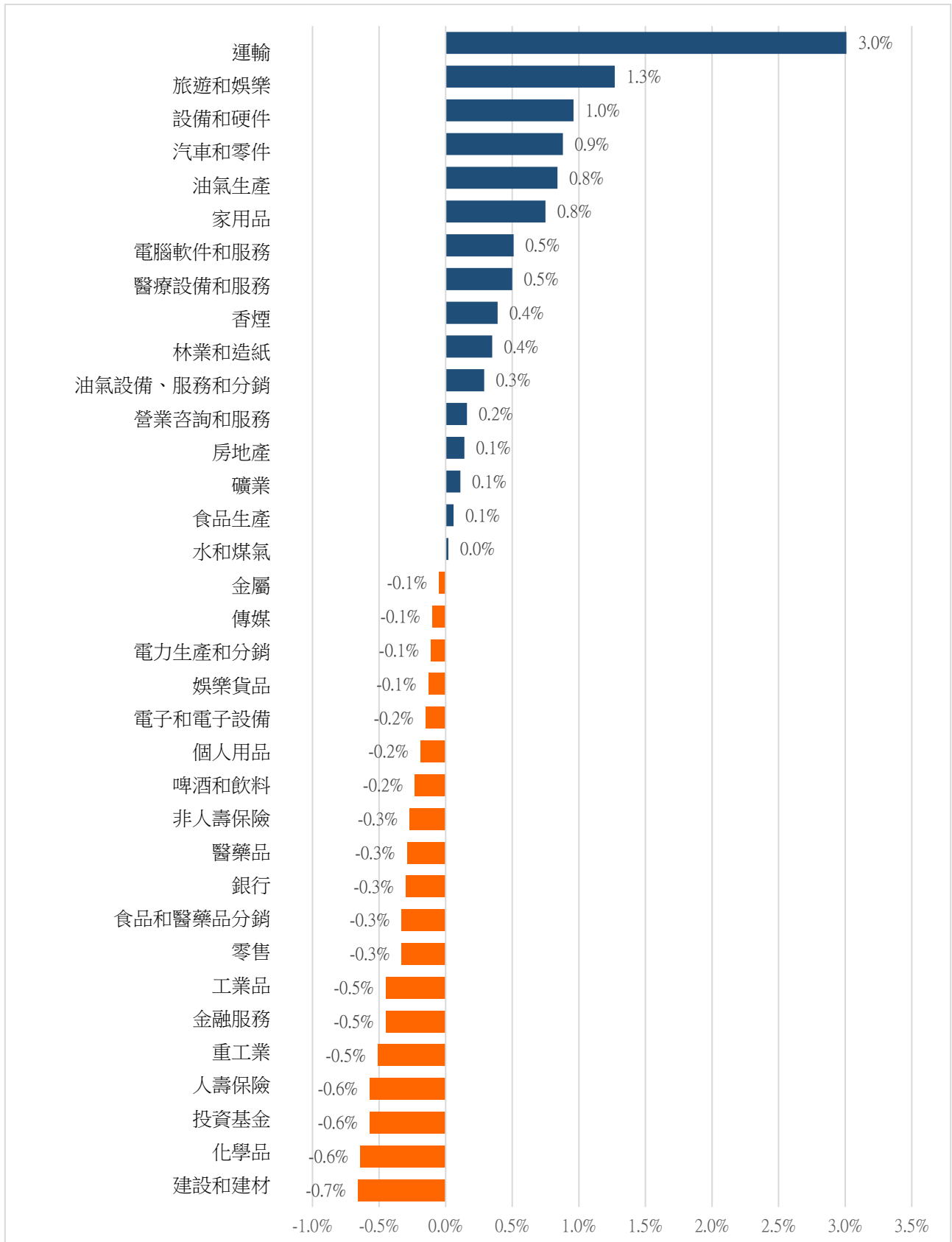
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



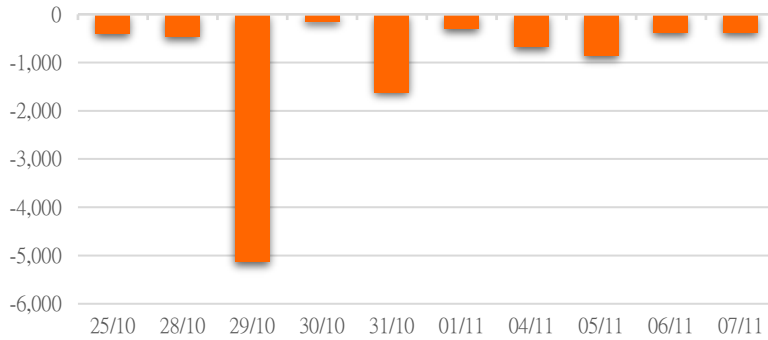
資料源: FiinPro - YSVN



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外資買進賣統計

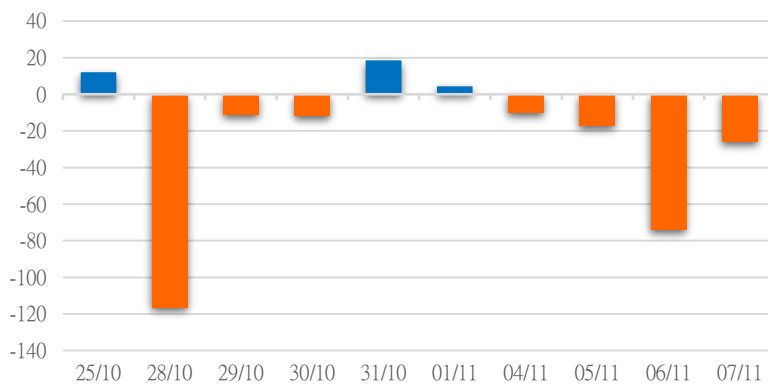
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MWG	47,643	VHM	-103,752
STB	42,938	MSN	-85,650
TCB	40,747	CMG	-67,466
DXG	30,773	VCB	-47,675
VND	29,701	KBC	-41,321

HSX 外資買/賣超的前 5 名

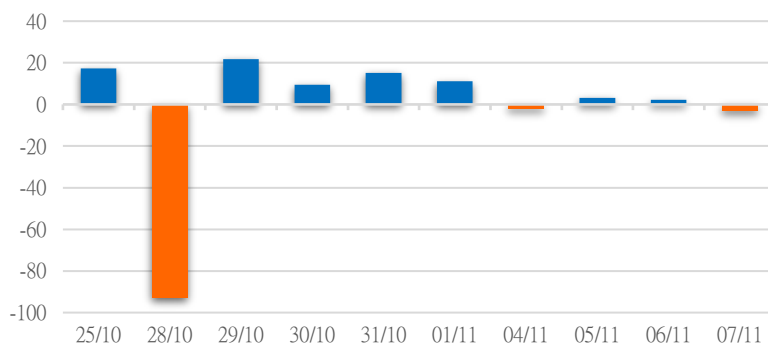
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
SHS	2,441	PVS	-12,208
CTP	493	MBS	-7,290
PVI	480	CEO	-4,655
TNG	423	BVS	-2,080
LAS	414	VC3	-1,195

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)
BSR	3,247	ACV	-2,277
VEA	1,446	QTP	-2,261
ABI	355	HNG	-2,195
QNS	320	MCH	-1,627
KLB	232	CST	-303

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

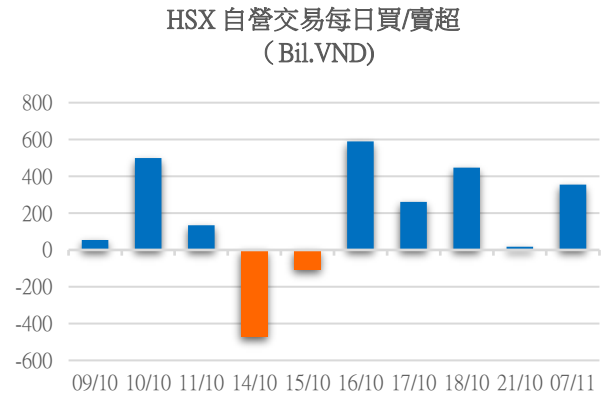


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自營統計

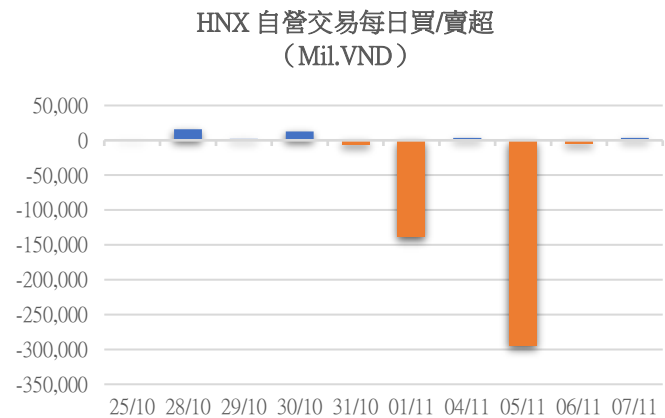
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
FUEVFNVD	88,200	BVH	59,531
MWG	59,376	GVR	17,054
HHV	38,375	LPB	11,310
FPT	25,718	VCI	10,697
TPB	25,188	YEG	9,709

HSX 自營交易最大前名



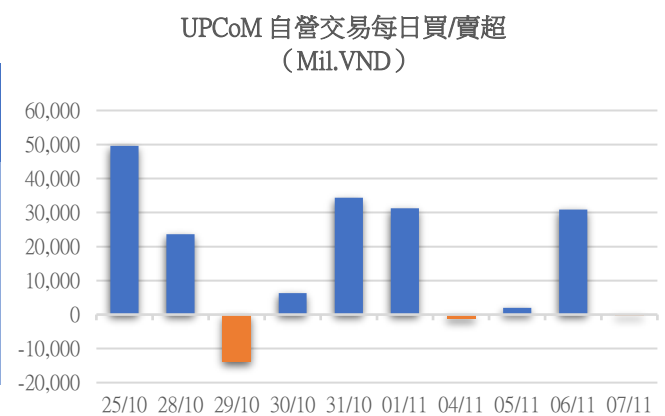
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VC2	3,777	MBS	2,910
VCS	2,103	TNG	968
LAS	1,648	PVS	752
PLC	439		
IDC	108		

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)
		QTP	472

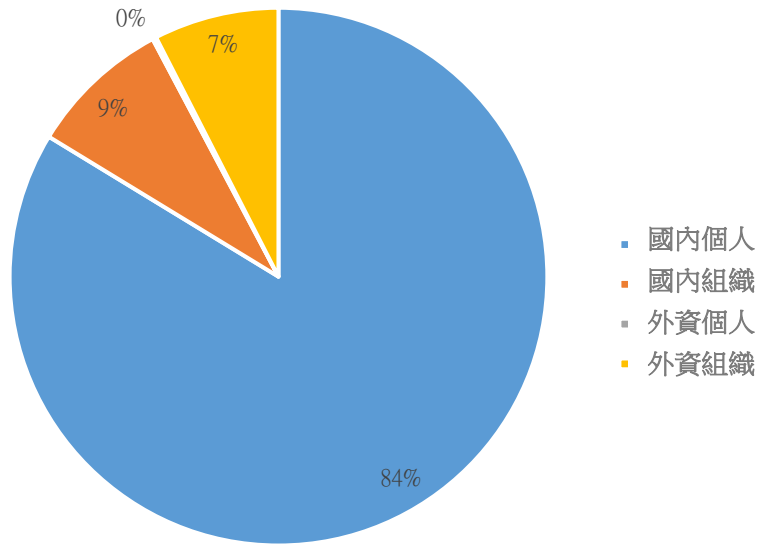
UPCoM 自營交易最大前名





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越南證券市場投資人類別統計

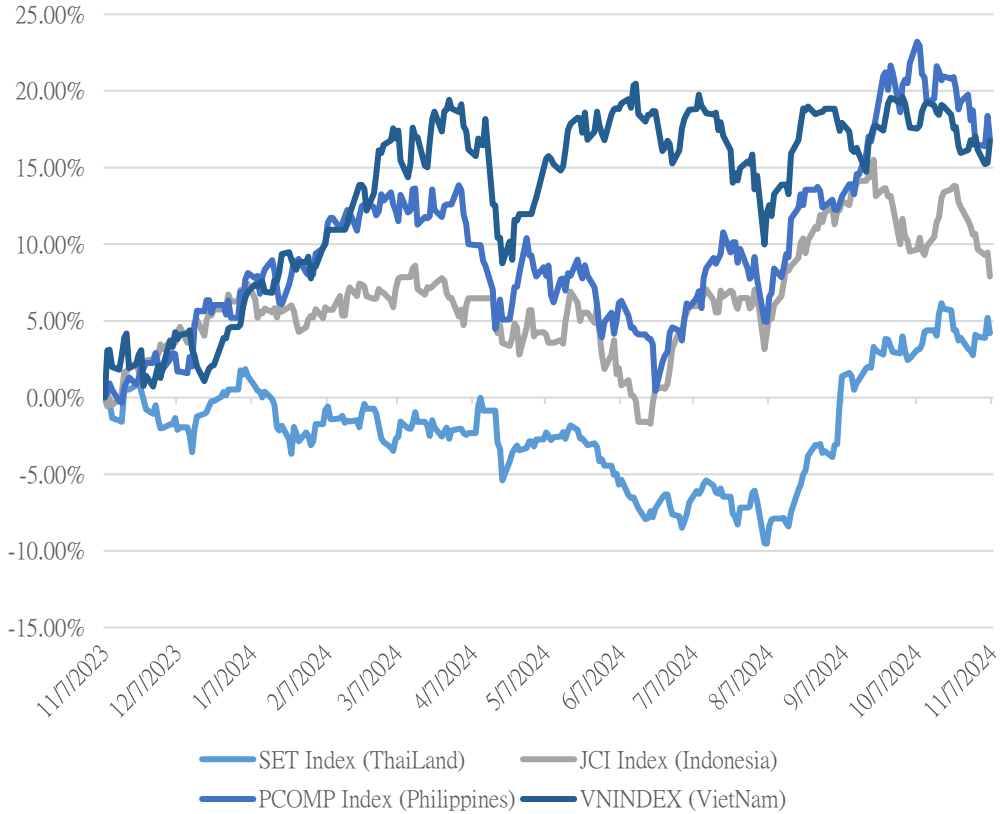


資料源: FiinPro - YSVN



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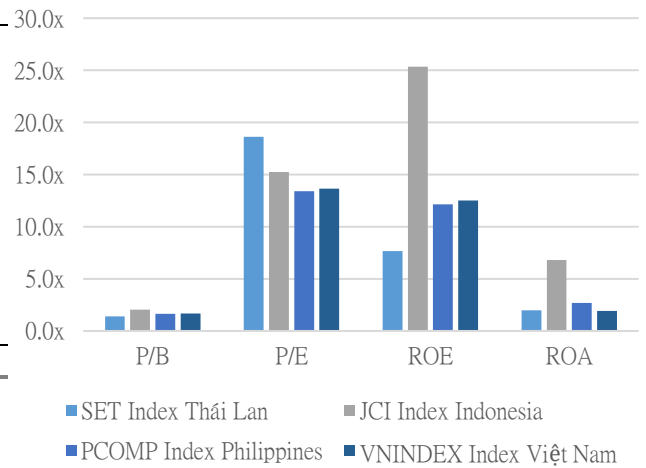
東南亞主要市場走勢比較



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



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



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