

當日市場：VN-Index 收窄跌幅

2024/11/19

市場走勢

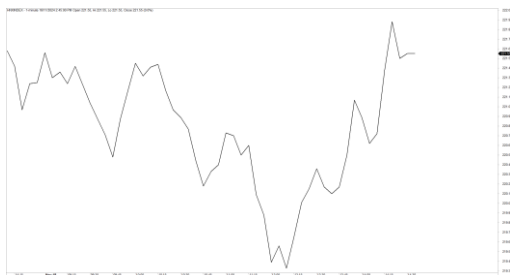
市場指數	VNI	HNI	UPCOM
收盤	1,217.12	221.79	91.64
%日	-0.12%	0.12%	0.34%
%週	-2.66%	-2.23%	-0.82%
%月	-5.32%	-3.24%	-1.14%
%年	10.53%	-2.10%	6.53%
<b>成交值(Bil.VND)</b>			
當日	15,545	957	739
日均量/週	15,967	1,041	797
日均量/月	15,188	884	647
<b>外資進出</b>			
買進	1,416.60	49.45	14.64
賣出	2,890.23	67.03	4.67
買賣超	-1,473.63	-17.58	9.96
<b>市場漲跌家數</b>			
上漲	165	72	131
下跌	155	77	181
持平	95	167	591
<b>市場指標</b>			
P/E	12.72	15.10	31.26
總市值 (兆盾)	5,035	315	1,530
股息殖利率 <sup>2</sup>	2.72%	3.12%	4.12%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在盤初的交易日繼續下跌慣性，並維持下跌狀態，但跌幅放緩。接近 1,200 點的需求幫助 VN-Index 收盤，跌幅收窄至 0.12%，止於 1,217.12 點。HNX-Index 反轉上漲 0.12%，而 Upcom-Index 上漲 0.34%。三大市場的交易額均比前一交易日下降，達到 17 兆 2,410 億越南盾。

VN30-Index 下跌 0.08%，其中有 12 檔上漲股和 14 檔下跌股，其中 SSI (1.46%)、TPB (2.56%)、VHM (1.37%)、CTG (0.6%)、GAS (0.58%) 等在當日反轉上漲。相反，MWG (-1.67%)、PLX (-1.82%)、BCM (-1.47%)、VJC (-1.55%) 走弱於大盤。

證券股在本周的首個交易日出現樂觀，其中 ORS (6.64%)、VIX (2.06%)、HCM (3.6%)、SSI (1.46%)、VCI (2.17%)。這也是對現金流吸引積極最多的股票。相反，HAG (-3.39%)、KBC (-5.96%)、SZC (-1.5%) 相當下跌。

外資繼續延續賣超勢頭，價值超過 1 兆 4,810 億越南盾，主要集中在 SSI (2,680 億)、VHM (2,430 億)、MWG (1,980 億)。相反，STB (330 億)、TCB (260 億)、GAS (200 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復甦，VN-Index 可能會重新測試 1,230 - 1,232 點的下跌幅度。同時，短期風險依然較高，因此市場仍處於技術性復甦期，並無法確認短期底部。此外，短期情緒指標持續下降，顯示投資者對當前市場走勢仍處於悲觀態度。

大盤的短期走勢仍維持下跌。因此，我們建議投資者在短期投資組合繼續持有 40-45% 的股票比例，並在此期間不應買進新股，投資者需要在未來的 1-2 個交易日更多觀察市場走勢以確認合理的支付區域。

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



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1217.12	-0.12%
VN30	1270.23	-0.08%
VN Mid	1823.03	-0.01%
VN Small	1383.74	0.33%

河內交易所 (HSX)

	收盤	漲跌%
HNI	221.79	0.12%
HN30	470	0.08%
VNX AllSh	1266.33	-0.03%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	91.64	0.34%

外資交易	成交值 (Bil.VND)
買進	1416.60
賣出	2890.23
買超/賣超	-1473.63

外資交易	成交值 (Bil.VND)
買進	49.45
賣出	67.03
買超/賣超	-17.58

外資交易	成交值 (Bil.VND)
買進	14.64
賣出	4.67
買超/賣超	9.96

上漲排名/ 股碼	漲跌(VND)	漲跌%
NO1	750	6.91%
TCH	950	6.69%
ORS	850	6.64%
DC4	700	5.79%
HHS	370	5.26%

上漲排名/ 股碼	漲跌(VND)	漲跌%
CTP	3200	9.73%
MST	400	7.55%
VC2	400	4.76%
MBS	1000	3.77%
DXP	400	3.36%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PHP	3423	10.66%
VBB	469	4.79%
CQN	1319	4.40%
TTN	615	3.55%
MFS	1019	2.81%

下跌排名/ 股碼	漲跌(VND)	漲跌%
KBC	-1750	-5.96%
SIP	-4000	-4.88%
CTF	-1150	-4.19%
CTR	-4500	-3.47%
HAG	-400	-3.39%

下跌排名/ 股碼	漲跌(VND)	漲跌%
DL1	-600	-10.00%
GKM	-600	-8.70%
DTD	-1400	-5.22%
AAV	-200	-3.17%
VC7	-200	-2.17%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ANT	-2808	-12.21%
PSB	-384	-6.62%
FOX	-3360	-3.45%
SEA	-1313	-3.16%
FOC	-2274	-2.71%

市值排名/ 股碼	Bil.VND
VCB	512,519,669
BID	254,809,485
FPT	196,976,164
CTG	177,746,727
VHM	175,263,291

市值排名/ 股碼	Bil.VND
IDC	18,446,996
PVS	16,250,854
MBS	14,496,823
HUT	14,458,694
THD	13,705,999

市值排名/ 股碼	Bil.VND
ACV	253,109,673
VGI	253,028,981
MCH	159,748,575
VEA	59,934,195
BSR	59,256,749

交易量排名/ 股碼	成交值	30 日均
SHB	35,184,361	17,420,290
VPB	25,797,503	20,176,919
SSI	24,877,000	10,400,564
VIX	24,066,900	18,327,935
VHM	23,242,900	19,595,647

交易量排名/ 股碼	成交值	30 日均
SHS	8,790,635	9,993,175
MST	7,682,700	1,255,764
MBS	3,440,251	2,296,186
DL1	3,035,283	886,941
CEO	2,935,175	3,865,892

交易量排名/ 股碼	成交值	30 日均
HNG	4,528,179	3,675,381
CQN	3,603,336	1,487
VCR	3,528,900	2,561,146
BSR	3,418,614	3,529,432
VEA	1,568,911	764,373

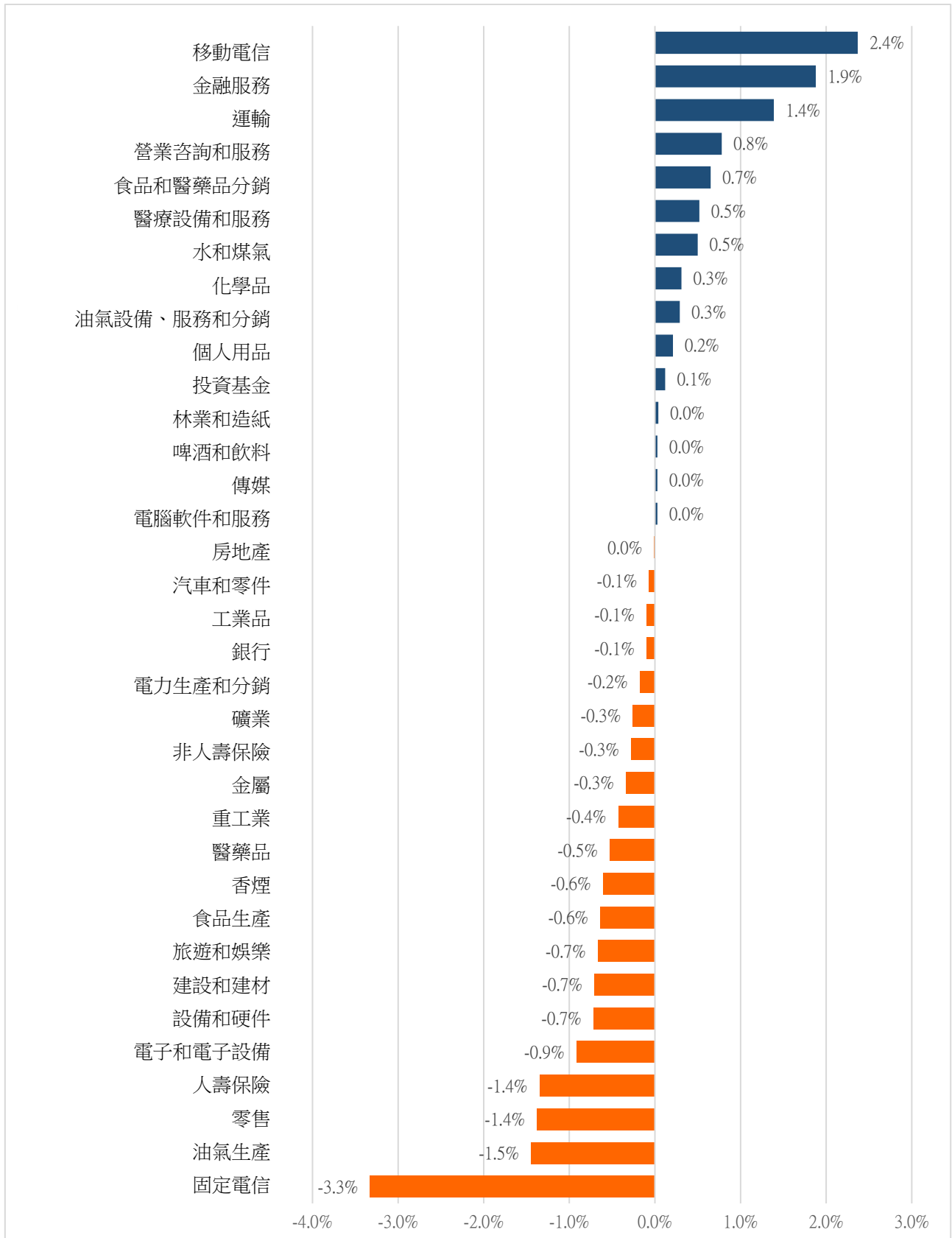
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



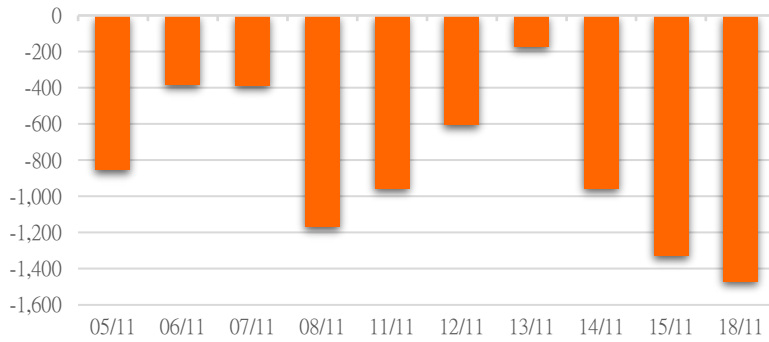
資料源: FiinPro - YSVN



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## 外資買進賣統計

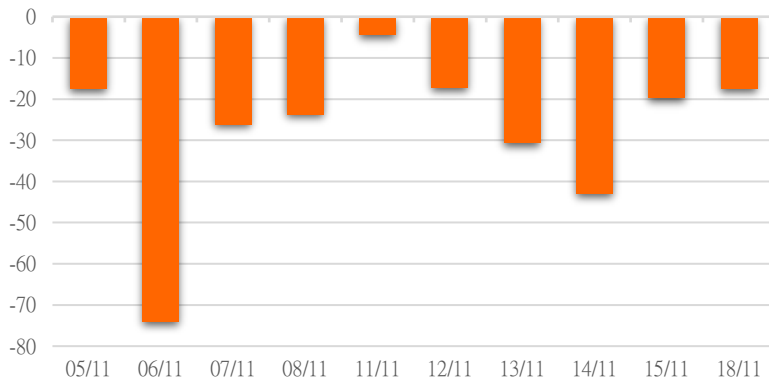
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
STB	32,529	SSI	-268,177
TCB	26,454	VHM	-242,607
GAS	19,898	MWG	-198,077
HCM	17,601	HDB	-145,575
VCI	15,032	VNM	-108,297

HSX 外資買/賣超的前 5 名

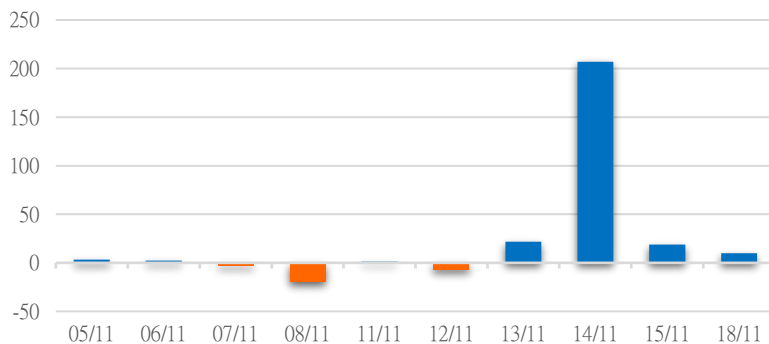
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	10,296	SHS	-20,433
BVS	3,343	IDC	-3,336
VFS	700	DTD	-2,204
CEO	597	TNG	-2,055
IVS	566	VGS	-1,669

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)
OIL	3,519	VAB	-401
QNS	2,627	CST	-243
VEA	1,415	CSI	-149
TTN	1,260	MCH	-143
BSR	509	GDA	-136

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

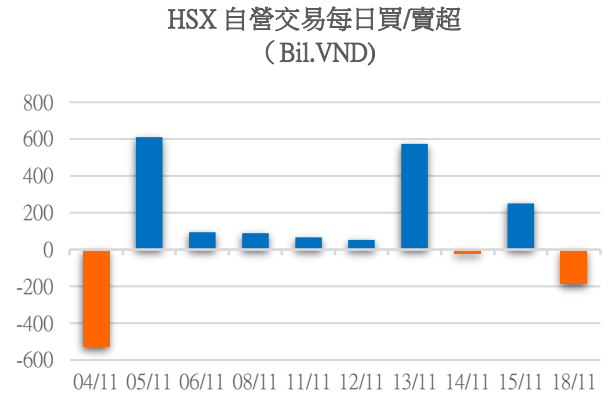


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## 自營統計

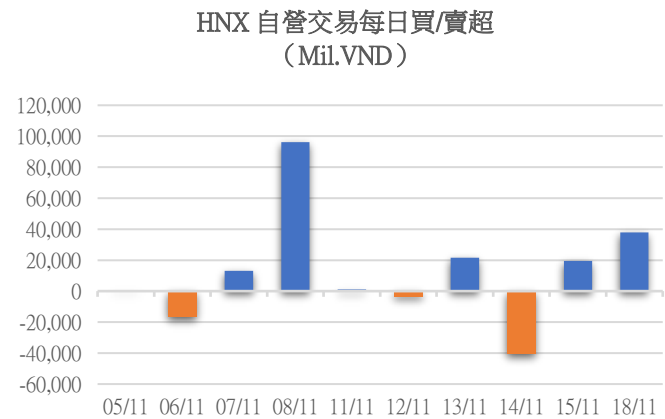
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
DGC	196,961	HPG	42,495
MWG	25,851	STB	40,587
HDG	10,656	VPB	26,840
DGW	1,790	GAS	24,654
GEX	1,149	TCB	24,182

HSX 自營交易最大前名



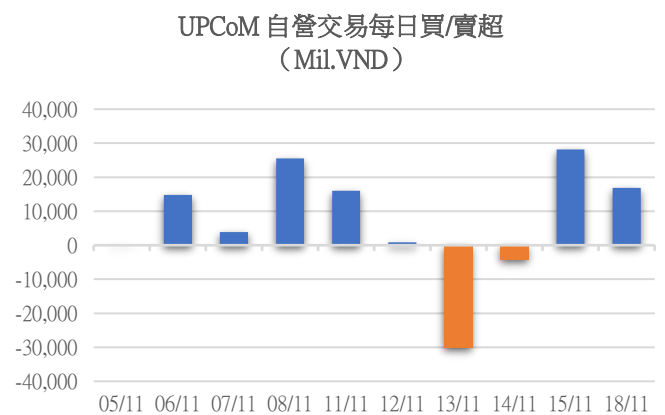
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VIT	39,405	VC2	1,786
PVS	3,374	VGS	1,540
		LAS	1,474
		KHS	1

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)

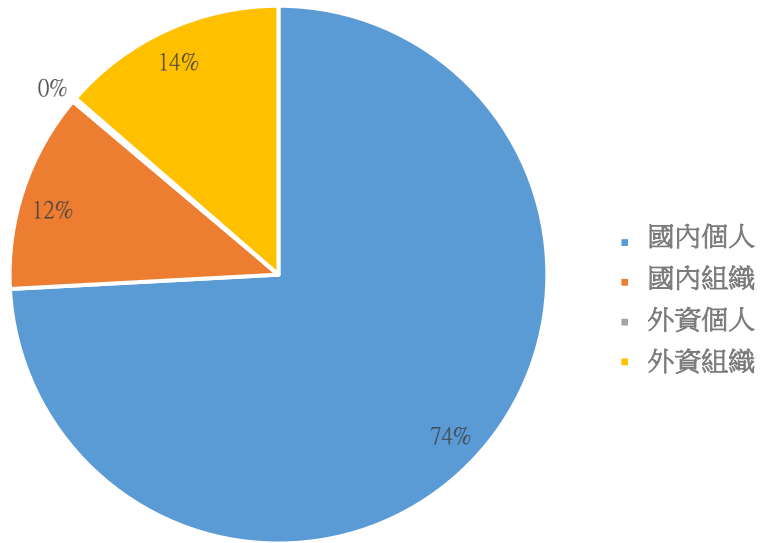
UPCoM 自營交易最大前名





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### 越南證券市場投資人類別統計

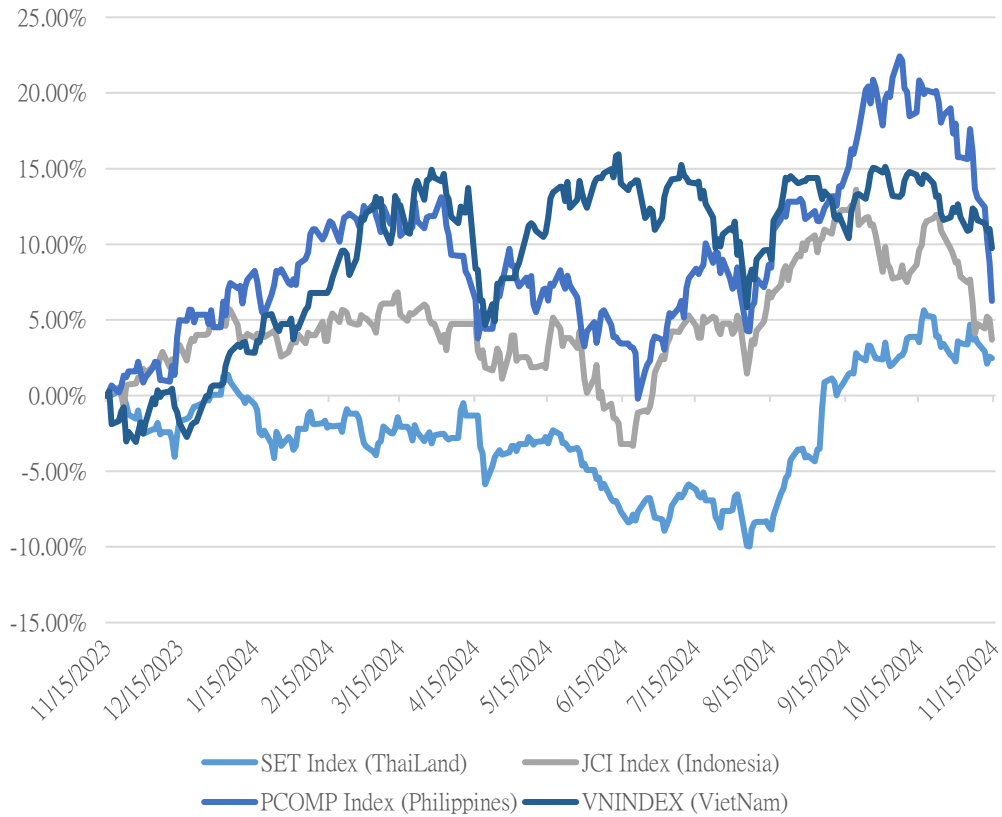


資料源: FiinPro - YSVN



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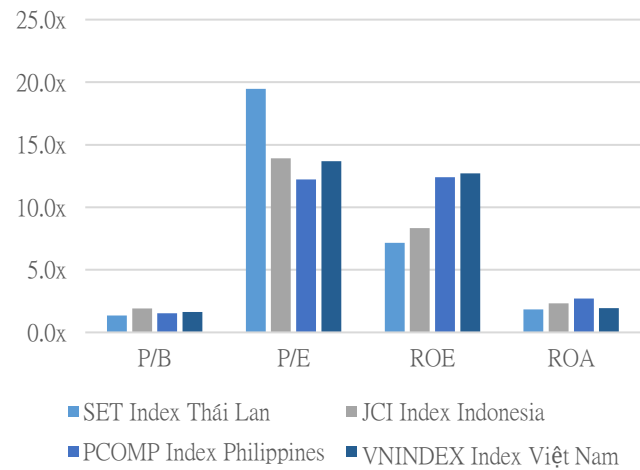
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	1.9x	1.5x	1.6x
P/E		19.5x	13.9x	12.2x	13.7x
ROE	%	7.16	8.34	12.40	12.71
ROA	%	1.84	2.32	2.70	1.93
Vốn hóa	Tỷ USD	513.76	763.04	156.52	197.82
GTGD	Triệu USD	1.31	0.56	0.09	0.63
LS cổ tức	%	3.26	3.31	2.77	1.88

源: Bloomberg & YSVN







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## 聯繫方式

### 個人研究分析部

電話號碼: +84 28 3622 6868 分機碼: 3826

電子郵件: [research.re@yuanta.com.vn](mailto:research.re@yuanta.com.vn)

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