

## 當日市場：VN-Index 在 1,200 點以上出現震盪

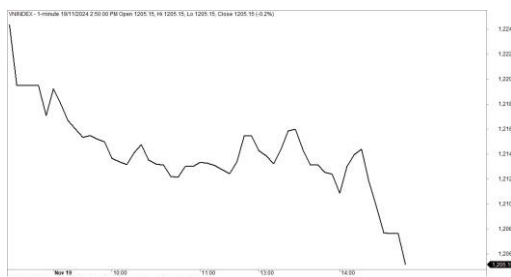
2024/11/20

### 市場走勢

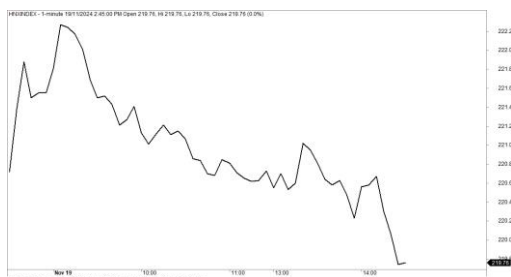
市場指數	VNI	HNI	UPCOM
收盤	1,205.15	219.68	90.30
%日	-0.98%	-0.95%	-1.46%
%週	-2.66%	-2.23%	-0.82%
%月	-5.32%	-3.24%	-1.14%
%年	10.53%	-2.10%	6.53%
<b>成交值(Bil.VND)</b>			
當日	13,244	632	900
日均量/週	15,967	1,041	797
日均量/月	15,188	884	647
<b>外資進出</b>			
買進	1,122.84	23.03	207.22
賣出	2,784.28	60.64	16.49
買賣超	-1,661.45	-37.62	190.73
<b>市場漲跌家數</b>			
上漲	78	53	162
下跌	244	93	150
持平	92	170	591
<b>市場指標</b>			
P/E	12.60	14.96	31.11
總市值 (兆盾)	4,985	313	1,522
股息殖利 <sup>2</sup>	2.82%	3.18%	4.13%

資料源: Bloomberg - YSVN

### VNINDEX



### HNIINDEX



### 市場走勢

經過前一個交易日的復甦後，市場未能維持復甦慣性，所有指數均收跌，VN-Index 收盤下跌 0.98%，止於 1,205.15 點。HNX-Index 下跌 0.95%，Upcom-Index 下跌 1.46%。三大市場的交易額比前一交易日下降，達到 14 兆 7,750 億越南盾。

科技股是對指數下跌壓力最大的股票，其中 FPT (-2.99%)、CMG (-6.93%)。此外，HPG (-1.36%)、BCM (-4.48%)、GVR (-2.41%)、GAS (-1.59%)、MWG (-2.38%)、SSI (-1.85%)、VCB (-1.1%) 引領指數下跌。相反，VHM (3.43%)、BID (0.34%)、CTG (0.15%)、SSB (0.3%) 逆市而行。VN30-Index 的寬度有 6 檔上漲股和 23 檔下跌股。整體而言，大型股的拋售壓力比前幾個交易日出現降溫的跡象。

同時，中小型股更強勁被拋售如 KBC、SZC、VSC、GEX、VIX、HAH、CTR、HVN 等下跌 3% 以上。

外資繼續延續賣超勢頭，價值超過 1 兆 5,080 億越南盾，主要集中在 VHM (3,420 億)、FPT (3,120 億)、HDB (2,080 億)。相反，MCH (2,000 億)、CTG (720 億)、SIP (100 億) 在買超方面的榜首。

### 市場短期觀點

我們認為市場可能會繼續下跌，VN-Index 可能在下一交易日重新測試 1,200 點水平。同時，主要指數仍形成上漲反轉模式，技術指標均下跌至超賣區域，30% 的股票數量達到超賣狀態，顯示市場可能會快速出現復甦期，投資者在下交易日需限制拋售。積極點的是，房地產和零售股也形成上漲反轉模式，顯示市場可能會快速形成底部。

短期策略 (1 個月以下)：大盤的短期走勢仍維持下跌。因此，我們建議投資者可以在投資組合繼續持有 35-40% 的低股票比例，若投資者沒有保證金壓力，則在此期間沒有需要賣出。同時，投資者需要在接下來的幾個交易日進一步觀察市場走勢，以找新的買點。

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	1205.15	-0.98%
VN30	1259.08	-0.88%
VN Mid	1793.94	-1.60%
VN Small	1360.23	-1.70%

河內交易所 (HSX)

	收盤	漲跌%
HNI	219.68	-0.95%
HN30	461.57	-1.79%
VNX AllSh	1251.58	-1.16%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	90.3	-1.46%

外資交易	成交值 (Bil.VND)
買進	1122.84
賣出	2784.28
買超/賣超	-1661.45

外資交易	成交值 (Bil.VND)
買進	23.03
賣出	60.64
買超/賣超	-37.62

外資交易	成交值 (Bil.VND)
買進	207.22
賣出	16.49
買超/賣超	190.73

上漲排名/ 股碼	漲跌(VND)	漲跌%
VRC	680	6.92%
NO1	800	6.90%
TRC	1850	4.06%
VHM	1400	3.43%
KHP	300	2.52%

上漲排名/ 股碼	漲跌(VND)	漲跌%
TVC	900	8.91%
SGH	2400	7.62%
TFC	2900	7.14%
SGC	4900	4.45%
CTP	1400	3.88%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PHP	1548	4.36%
DDV	560	3.18%
BCR	100	1.96%
ACV	2223	1.87%
MCH	3929	1.81%

下跌排名/ 股碼	漲跌(VND)	漲跌%
CIG	-580	-6.99%
CMG	-4000	-6.93%
CTF	-1800	-6.84%
HAH	-3200	-6.78%
QCG	-900	-6.77%

下跌排名/ 股碼	漲跌(VND)	漲跌%
GKM	-600	-9.52%
NRC	-400	-9.30%
DXP	-700	-5.69%
VCS	-2700	-3.97%
BVS	-1500	-3.91%

下跌排名/ 股碼	漲跌(VND)	漲跌%
AIG	-4785	-8.17%
VEA	-2000	-5.01%
TTN	-744	-4.16%
FOX	-3436	-3.65%
FOC	-2316	-2.84%

市值排名/ 股碼	Bil.VND
VCB	508,607,305
BID	253,384,376
FPT	197,123,271
CTG	178,820,725
VHM	177,658,194

市值排名/ 股碼	Bil.VND
IDC	18,248,996
PVS	16,203,057
MBS	15,043,873
HUT	14,369,443
THD	13,667,499

市值排名/ 股碼	Bil.VND
ACV	259,094,110
VGI	258,940,063
MCH	157,370,314
VEA	59,609,968
BSR	58,394,810

交易量排名/ 股碼	成交值	30 日均
VHM	26,469,700	21,306,498
SHB	24,893,824	18,609,564
HDB	17,007,100	9,441,638
HPG	16,292,800	19,149,233
VIX	14,856,600	19,022,712

交易量排名/ 股碼	成交值	30 日均
SHS	5,366,907	9,629,106
DL1	2,853,926	1,018,206
BAB	2,155,023	654,447
CEO	2,001,644	3,738,301
MBS	1,728,241	2,259,228

交易量排 名/股碼	成交值	30 日均
BCR	2,750,116	1,547,763
DNA	2,690,000	1,391
VGI	2,125,878	1,709,218
DDV	1,928,994	811,070
AMP	1,778,378	247

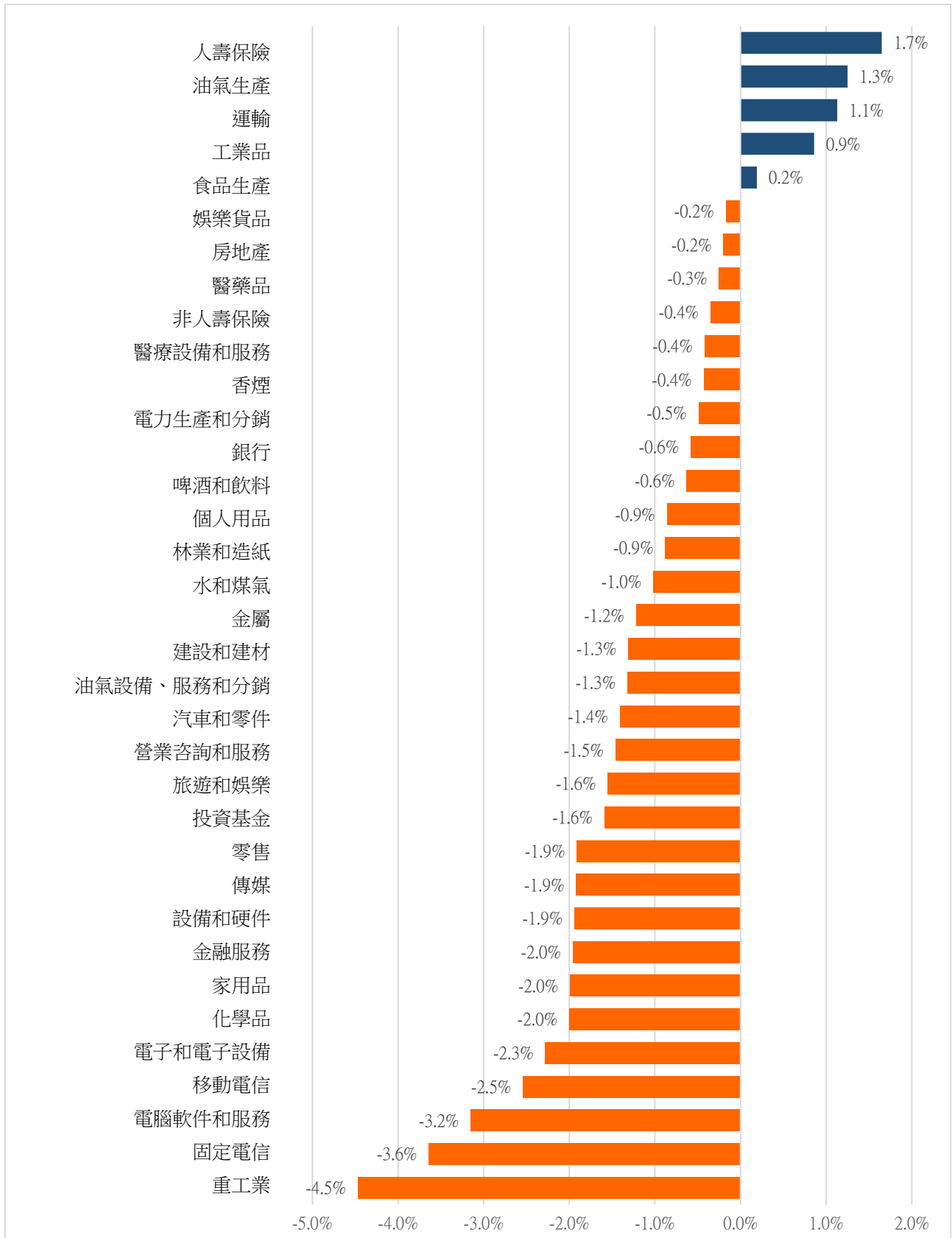
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



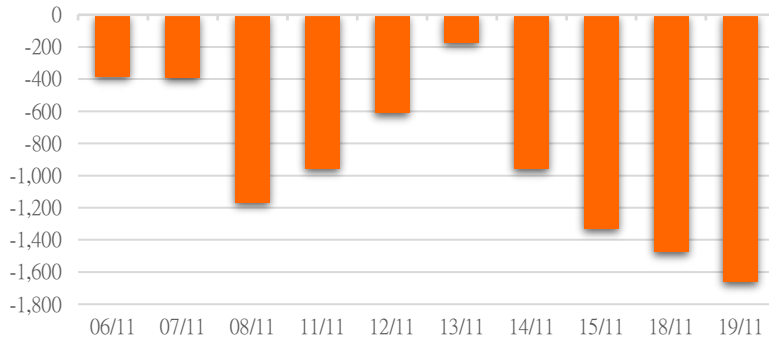
資料源: FiinPro - YSVN



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## 外資買進賣統計

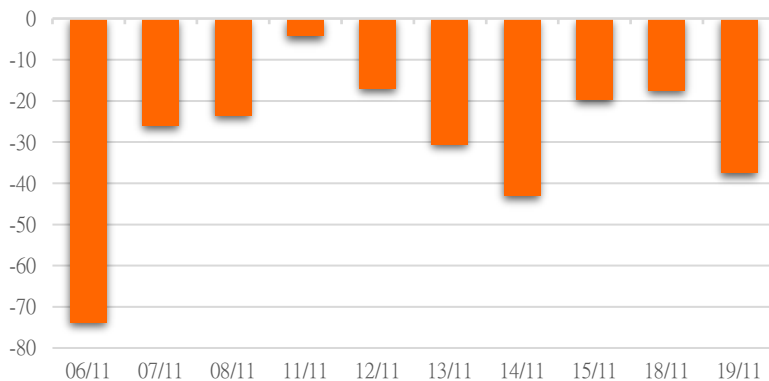
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
CTG	71,717	VHM	-342,126
SIP	9,704	FPT	-312,128
KDH	8,168	HDB	-207,708
GAS	7,316	HPG	-131,448
KBC	7,305	SSI	-108,857

HSX 外資買/賣超的前 5 名

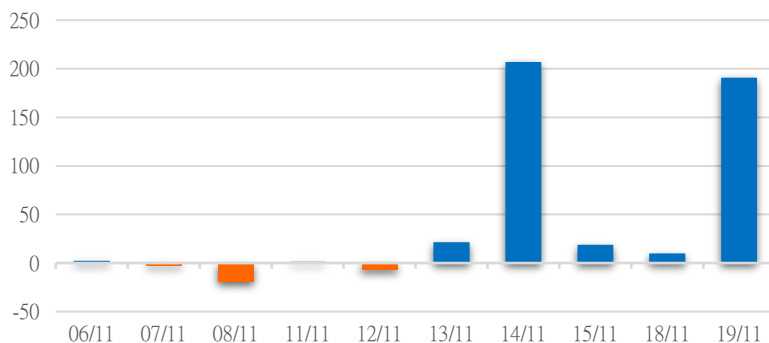
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VFS	1,230	SHS	-27,919
TNG	991	PVS	-6,691
IVS	960	HUT	-1,855
PVI	826	NTP	-1,752
CTP	292	BVS	-1,040

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)
MCH	200,171	ACV	-4,774
QNS	1,616	VEA	-3,867
KLB	420	NTC	-1,939
ABW	324	AIG	-578
ABI	303	DDV	-536

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



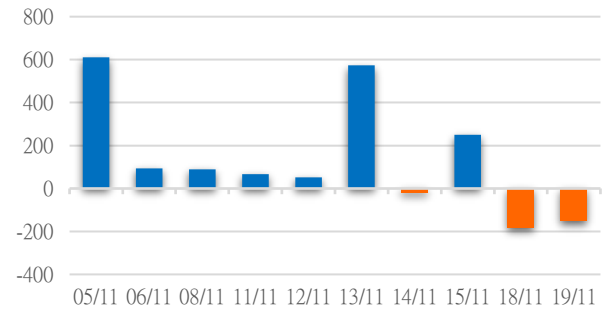
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## 自營統計

證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
E1VFN30	37,204	VPB	35,582
FPT	21,456	TCB	24,855
VHM	14,111	HPG	22,613
HAH	13,780	MWG	20,814
HDG	10,970	CTG	12,673

HSX 自營交易最大前名

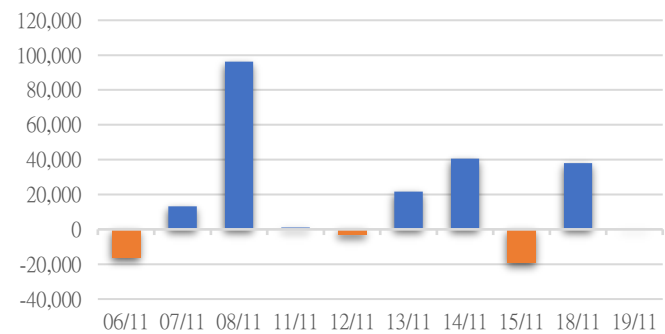
HSX 自營交易每日買/賣超  
(Bil.VND)



證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
		VGS	334

HNX 自營交易最大前名

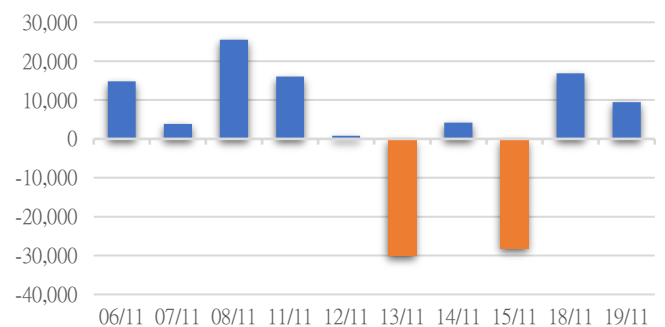
HNX 自營交易每日買/賣超  
(Mіл.VND)



證券代碼	買超金額 (Mіл.VND)	證券代碼	賣超金額 (Mіл.VND)
CLX	6,569.50	SEA	8,407
VGI	6,350.50		
VAB	3,555.00		
MSR	1,400.00		

UPCoM 自營交易最大前名

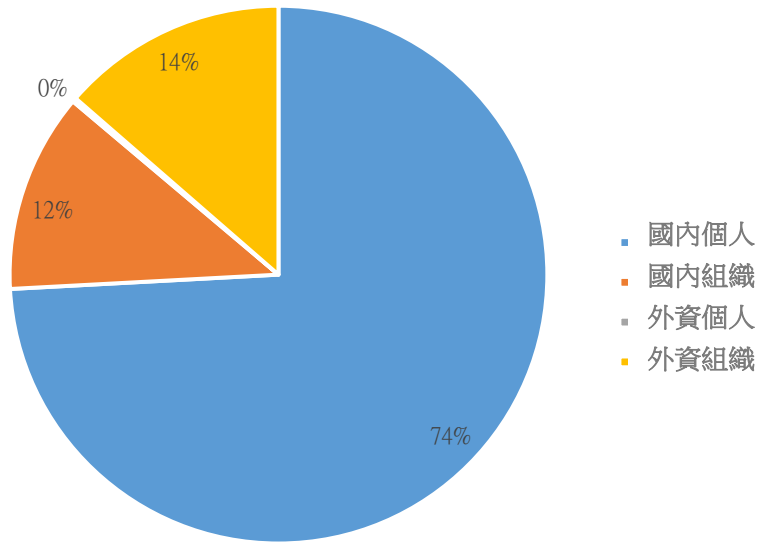
UPCoM 自營交易每日買/賣超  
(Mіл.VND)





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### 越南證券市場投資人類別統計

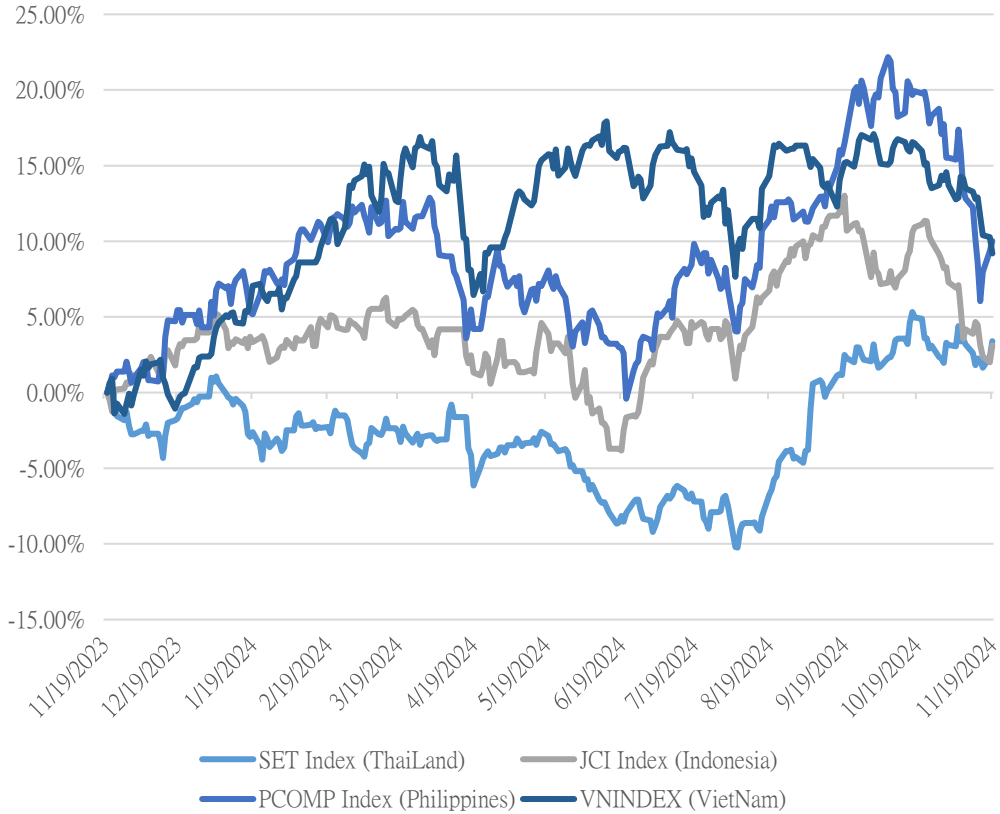


資料源: FiinPro - YSVN



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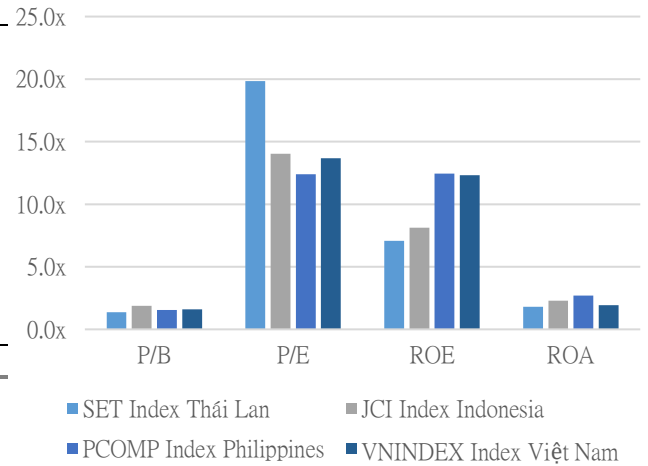
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	1.9x	1.6x	1.6x
P/E		19.8x	14.0x	12.4x	13.7x
ROE	%	7.07	8.12	12.44	12.31
ROA	%	1.82	2.29	2.70	1.93
Vốn hóa	Tỷ USD	520.93	758.91	157.77	197.57
GTGD	Triệu USD	1.02	0.61	0.07	0.52
LS cổ tức	%	3.22	3.27	2.76	1.89

源: Bloomberg & YSVN



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





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