

當日市場：需求在尾盤的交易日更加活躍

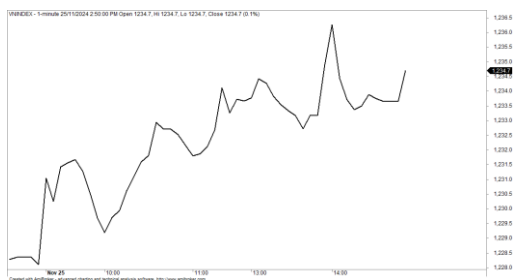
2024/11/26

市場走勢

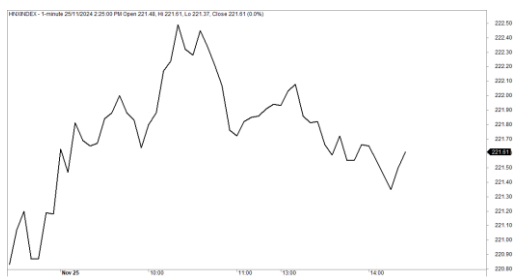
市場指數	VNI	HNI	UPCOM
收盤	1,234.70	222.25	91.82
%日	0.54%	0.43%	0.13%
%週	1.44%	0.21%	0.20%
%月	-1.44%	-1.06%	0.00%
%年	12.70%	-1.70%	8.04%
<b>成交值(Bil.VND)</b>			
當日	11,946	698	395
日均量/週	13,575	744	699
日均量/月	14,750	861	686
<b>外資進出</b>			
買進	1,688.63	93.14	5.03
賣出	1,633.28	27.98	9.34
買賣超	55.35	65.17	-4.31
<b>市場漲跌家數</b>			
上漲	189	77	175
下跌	106	73	156
持平	119	166	572
<b>市場指標</b>			
P/E	12.91	15.05	31.11
總市值 (兆盾)	5,107	314	1,515
股息殖利 <sup>2</sup>	2.08%	3.18%	4.10%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場持續處於震盪狀態，但需求在尾盤的交易日活躍參與。具體而言，VN-Index 收盤上漲 0.54%，止於 1,234.7 點。 HNX-Index 同步上漲 0.43%，而 Upcom-Index 上漲 0.13%。3 大市場的交易額均下降，僅達到 13 兆 400 億越南盾。

寬度繼續積極，漲幅佔主導地位，其中 VN30-Index 有 18 檔上漲股和 5 檔下跌股。 POW 漲停，而 MSN (1.69%)、VHM (2.64%)、VIB (1.65%)、VIC (1.36%)、VJC (1.08%) 等是相當上漲的股票。在下跌方面，拋售壓力緩解，當 SSB、MBB、BID、ACB 和 BCM 下跌，但跌幅不大。

許多中小型股也出現積極走勢，如 HAG (3.42%)、BCG (1.44%)、ORS (3.03%)、REE (3.4%)、DC4 (6.64%)、ITA (4.78%)、TCM (2.38%) 等。

外資繼續買超超過 1,160 億越南盾，其中 MSN (890 億)、CTG (550 億)、PVS (530 億) 在買超方面領先。另一方面，KDC (680 億)、VCB (430 億)、HDB (410 億) 在賣超方面的榜首。

市場短期觀點

我們認為市場可能會繼續上漲，VN-Index 可能會在下一交易日重新測試 20 日均線。同時，市場出現快速進入短期調整階段的跡象，顯示短期風險逐步下跌。短期情緒指標小幅上漲，顯示投資者的悲觀情緒走弱，積極點的是外資在連續第二個交易日反轉買超。

短期策略（1 個月以內）：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% 的股票比例，並可以考慮較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	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	1234.7	0.54%
VN30	1291.94	0.46%
VN Mid	1837.57	0.61%
VN Small	1382.28	0.50%

河內交易所 (HSX)

	收盤	漲跌%
HNI	222.25	0.43%
HN30	471.74	0.81%
VNX AllSh	1282.84	0.49%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	91.82	0.13%

外資交易	成交值 (Bil.VND)
買進	1688.63
賣出	1633.28
買超/賣超	55.35

外資交易	成交值 (Bil.VND)
買進	93.14
賣出	27.98
買超/賣超	65.17

外資交易	成交值 (Bil.VND)
買進	5.03
賣出	9.34
買超/賣超	-4.31

上漲排名/股碼	漲跌(VND)	漲跌%
HTL	2150	6.88%
TV2	2050	6.88%
DC4	850	6.64%
KHP	800	6.64%
POW	750	6.58%

上漲排名/股碼	漲跌(VND)	漲跌%
VC7	900	9.78%
HMR	1100	9.48%
SGC	5100	4.44%
VTZ	500	3.11%
AAV	200	3.03%

上漲排名/股碼	漲跌(VND)	漲跌%
PSB	328	5.96%
VCP	1042	4.36%
AVG	1586	4.20%
DRI	498	4.02%
VBB	349	3.42%

下跌排名/股碼	漲跌(VND)	漲跌%
NO1	-900	-6.77%
QCG	-750	-6.38%
TCO	-1300	-5.96%
BTP	-250	-2.19%
PAC	-700	-1.92%

下跌排名/股碼	漲跌(VND)	漲跌%
KSV	-4900	-9.84%
CTP	-1900	-5.43%
C69	-200	-3.17%
DHT	-1800	-2.20%
MST	-100	-1.64%

下跌排名/股碼	漲跌(VND)	漲跌%
ANT	-1992	-9.81%
NDC	-10015	-7.70%
DGT	-413	-6.26%
MFS	-834	-2.56%
HNG	-120	-2.31%

市值排名/股碼	Bil.VND
VCB	506,371,668
BID	260,509,921
FPT	196,976,164
CTG	187,949,711
VHM	181,141,688

市值排名/股碼	Bil.VND
IDC	17,885,996
PVS	15,916,277
MBS	14,770,348
HUT	14,190,940
THD	13,667,499

市值排名/股碼	Bil.VND
ACV	261,127,382
VGI	252,462,832
MCH	158,623,212
BSR	59,957,462
MVN	52,306,017

交易量排名/股碼	成交值	30 日均
POW	19,114,000	4,431,801
HPG	18,869,401	19,411,629
MSB	16,069,900	12,648,537
DXG	14,799,800	18,231,011
VIX	14,241,300	18,191,442

交易量排名/股碼	成交值	30 日均
PVS	3,411,539	1,937,801
CEO	3,379,152	3,606,553
MST	3,322,503	1,722,828
TIG	3,296,599	1,446,538
SHS	3,001,199	8,638,554

交易量排名/股碼	成交值	30 日均
BSR	2,063,762	2,934,131
DDV	1,499,709	932,500
VCR	1,411,400	2,445,546
HNG	1,339,016	4,361,813
DRI	1,099,695	464,763

資料源: Bloomberg & Yuanta Research

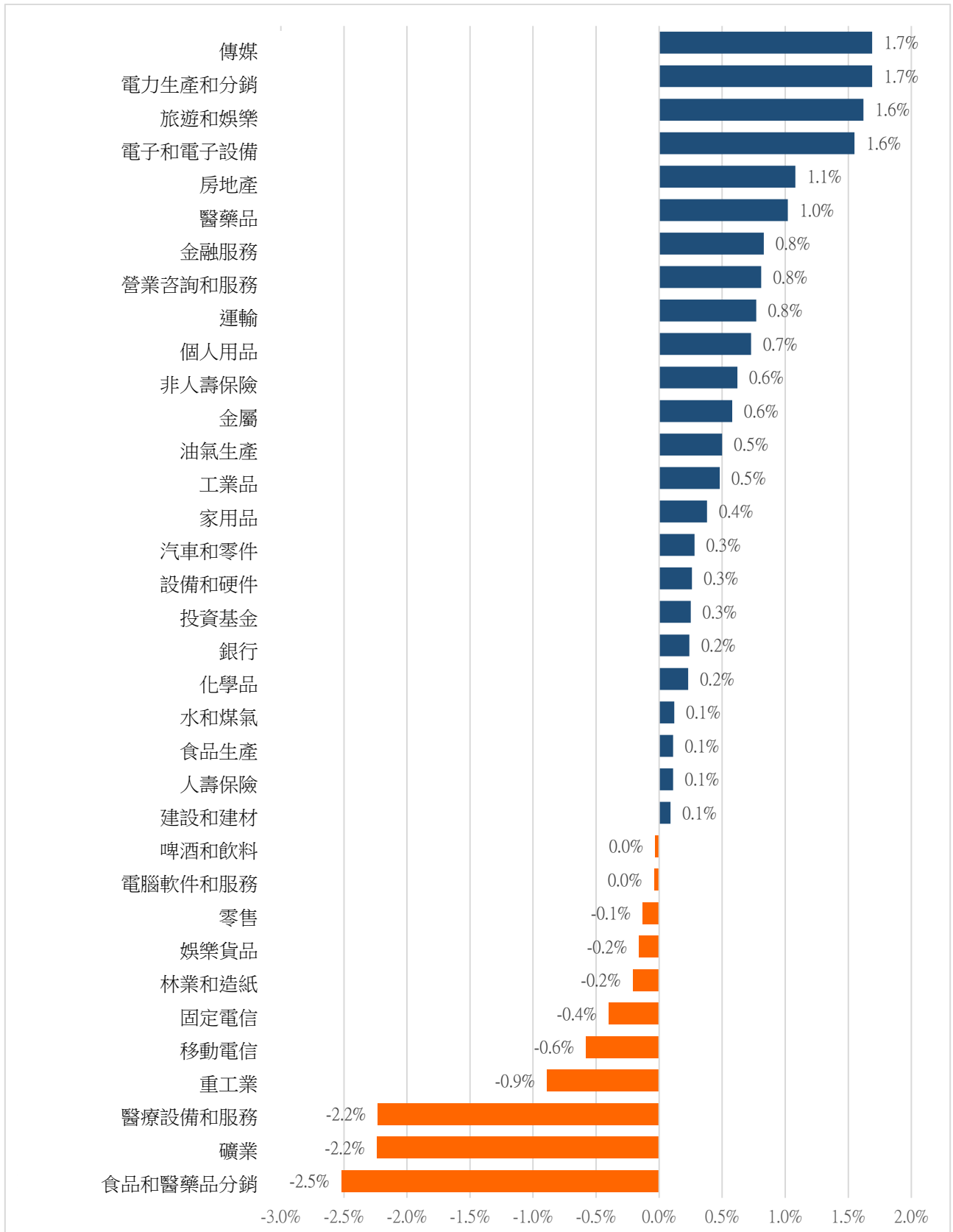
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### 各行業板塊的交易走勢



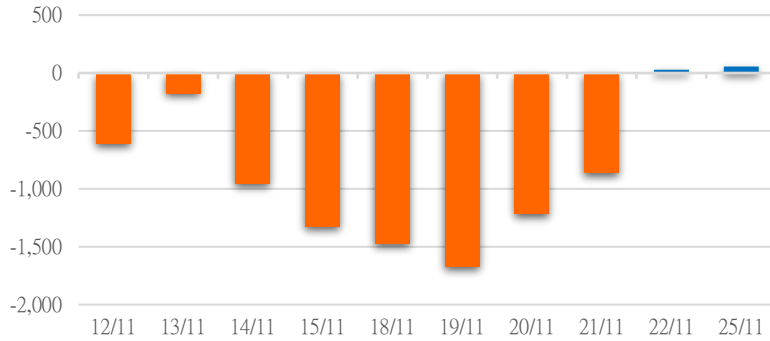
資料源: FiinPro - YSVN



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## 外資買進賣統計

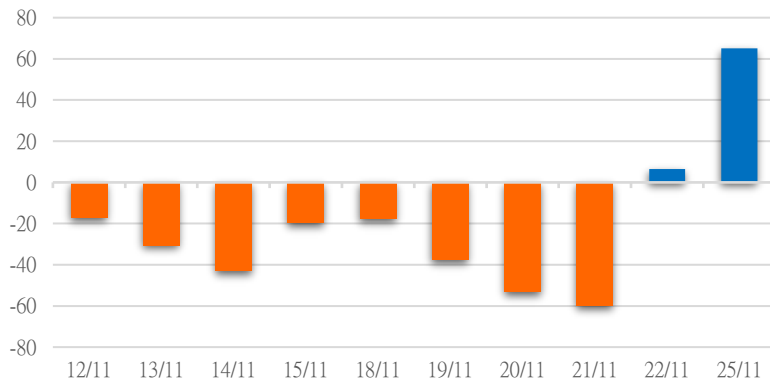
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MSN	89,443	KDC	-68,228
CTG	55,284	VCB	-43,200
KBC	52,181	HDB	-41,289
VHM	45,885	VIB	-39,113
TCM	32,980	CMG	-33,177

HSX 外資買/賣超的前 5 名

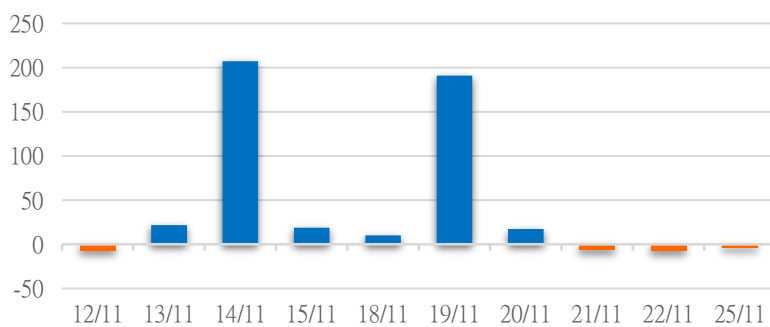
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	52,853	CEO	-13,395
DHT	18,711	VGS	-3,363
IDC	8,556	BVS	-763
TNG	2,482	LAS	-674
VC3	1,043	MBS	-561

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	1,313	ACV	-5,498
KLB	849	OIL	-1,334
QNS	823	VGI	-824
ABI	350	DDV	-206
GHC	151	AGX	-140

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



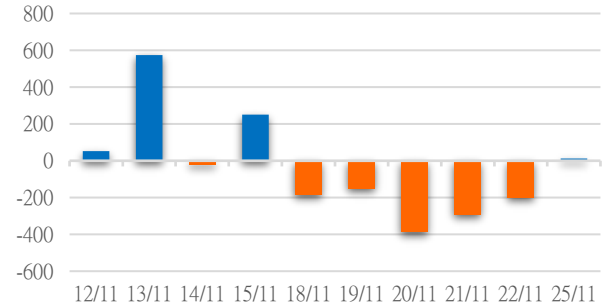
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## 自營統計

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
BWE	175,895	FRT	26,092
FUEMAVND	63,213	VPB	23,146
E1VFN30	33,116	TCB	22,901
SBT	9,398	HDG	20,483
GEX	1,949	MWG	16,560

HSX 自營交易最大前名

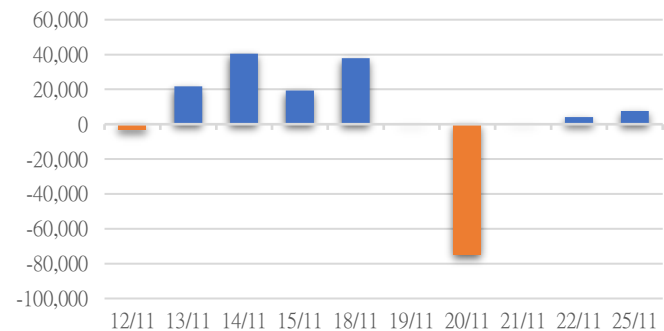
HSX 自營交易每日買/賣超  
( Bil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	7,765	KHS	343
IDC	109	NHC	2
		ALT	0

HNX 自營交易最大前名

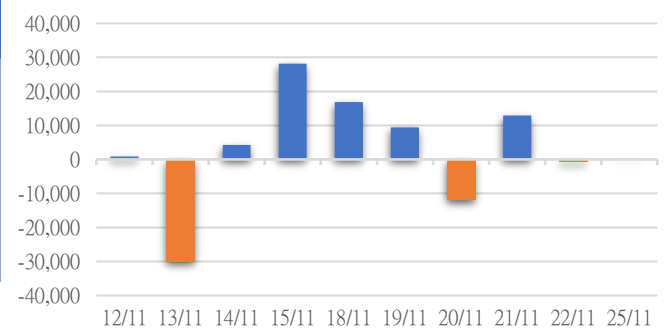
HNX 自營交易每日買/賣超  
( Mil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
ACV	1,810.00	BSR	1,930
FOX	183.00	VFC	8
		SII	1

UPCoM 自營交易最大前名

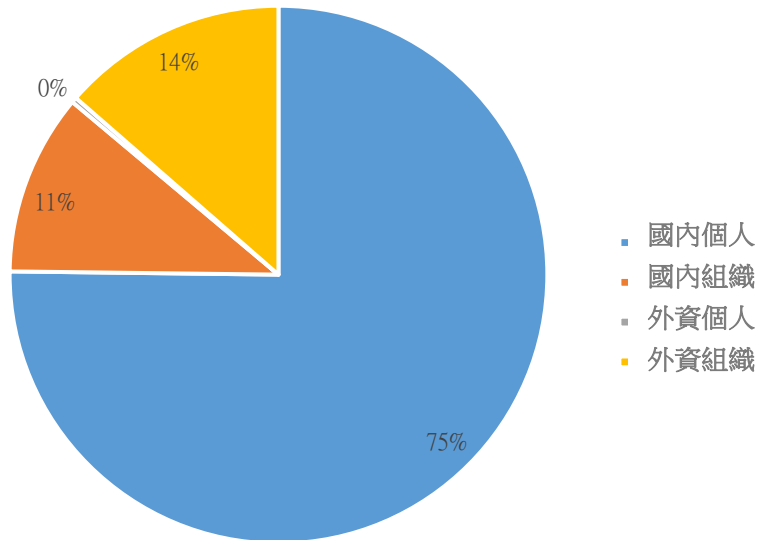
UPCoM 自營交易每日買/賣超  
( Mil.VND)





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### 越南證券市場投資人類別統計

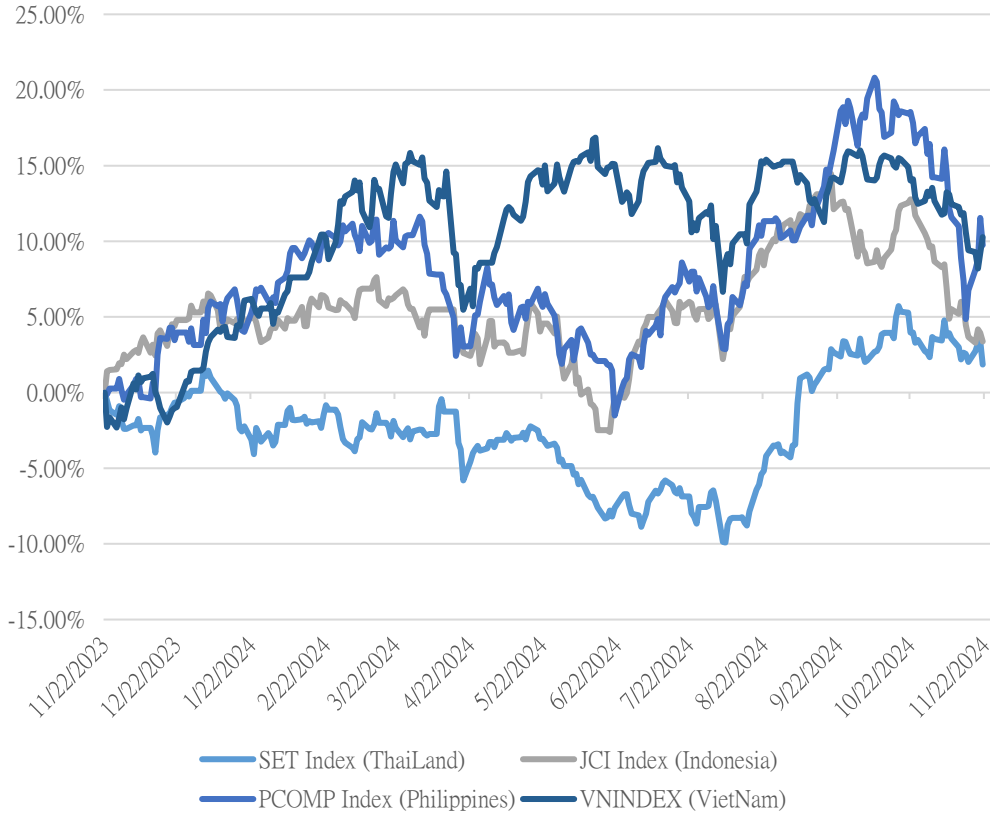


資料源: FiinPro - YSVN



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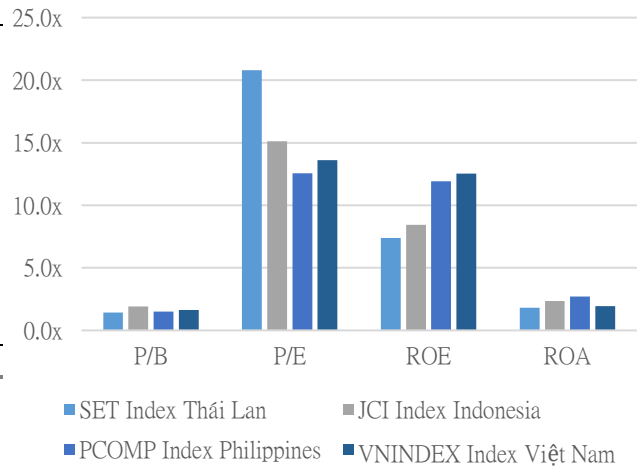
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	1.9x	1.5x	1.6x
P/E		20.8x	15.1x	12.6x	13.6x
ROE	%	7.38	8.45	11.92	12.53
ROA	%	1.81	2.35	2.70	1.93
Vốn hóa	Tỷ USD	516.58	756.63	159.65	199.22
GTGD	Triệu USD	1.12	0.56	0.06	0.41
LS cổ tức	%	3.27	3.28	2.77	1.86

源: Bloomberg & YSVN



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





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