

當日市場：指數收於交易日的最高水平

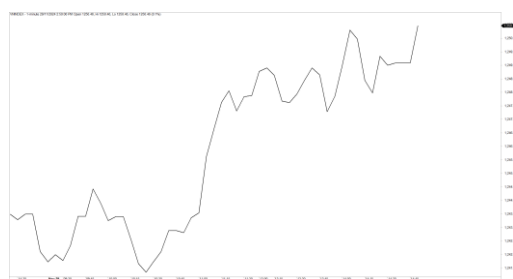
2024/12/02

市場走勢

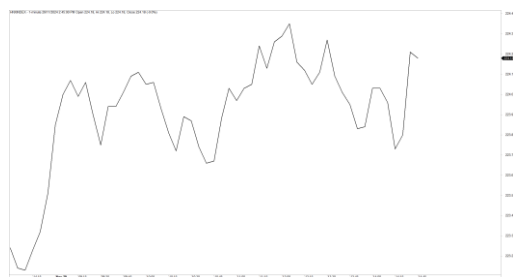
市場指數	VNI	HNI	UPCOM
收盤	1,250.46	224.64	92.74
%日	0.67%	0.48%	0.42%
%週	1.82%	1.51%	1.13%
%月	-0.90%	-0.41%	0.45%
%年	13.39%	-1.05%	9.05%
成交值(Bil.VND)			
當日	13,468	821	585
日均量/週	12,230	696	683
日均量/月	14,318	845	705
外資進出			
買進	1,812.00	36.11	31.56
賣出	1,482.07	21.45	16.46
買賣超	329.92	14.66	15.10
市場漲跌家數			
上漲	190	78	194
下跌	117	58	171
持平	107	180	538
市場指標			
P/E	13.08	15.92	32.01
總市值 (兆盾)	5,162	324	1,558
股息殖利 ²	2.01%	3.16%	3.88%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

市場在經歷了第五個交易日的猶豫和震盪後出現同步，以及 FPT 和銀行股引領。VN-Index 收盤上漲 0.67%，止於 1,250.45 點。HNX-Index 上漲 0.48%，Upcom-Index 上漲 0.42%。3 大市場的交易額仍處於較低水平，小幅增加至 14 兆 8,740 億越南盾。

FPT (3.52%) 在本周末的交易日繼續強勁暴漲，收於 144,300 越南盾，並創下該股票的歷史新高。FPT 的上漲勢頭逐步擴散至整個市場，銀行股再次出現樂觀。BID、OCB、MSB、CTG 小幅上漲，其中 HPG (1.33%)、MSN (1.1%)、SSI (1.03%)、SAB (1.08%) 是積極上漲的檔藍籌股。在下跌方面，沒有檔藍籌股大幅下跌。

保險、服裝、醫藥股處於積極的趨勢，如 BVH、MIG、DBC 漲停，GIL (3.93%)、TCM (2.87%)、DHT (2.38%) 等。

外資在連續第六個交易日買超近 3,600 億越南盾，其中 FPT (2,370 億)、MSN (890 億)、HPG (700 億) 在買超方面領先。另一方面，VRE (750 億)、VHM (530 億)、HDB (470 億) 在賣超方面的榜首。

市場短期觀點

我們認為市場可能會出現調整期，當 VN-Index 觸及 1,260 點的阻力位（相當於 50 日均線）。同時，市場仍處於短期調整階段，因此市場在交易日中可能會出現持續的漲跌，現金流可能會僅逐步復甦，但在當前還無法期待大幅上漲勢頭。積極點的是現金流在各類股票之間出現均勻分化。此外，短期情緒指標大幅上漲，顯示新的買進機會繼續增加。

短期策略（1 個月以內）：大盤的短期趨勢從中性調整至上漲。因此，我們建議投資者繼續逐步增加比例至較高水平。

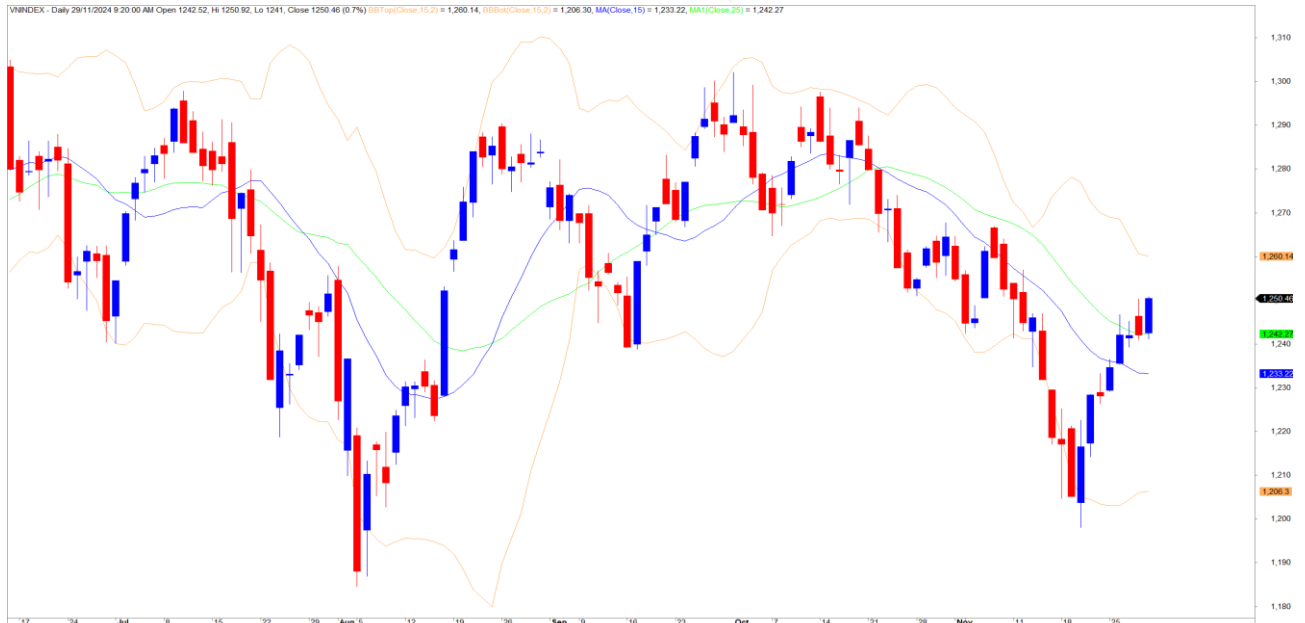
中期策略（1-5 個月）：VN-Index 比前一周收盤上漲 1.8%，價格走勢圖可能突破 50 周均線。同時，大盤的中期趨勢仍維持中性。因此，我們建議投資者繼續持有均衡的股票比例。

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



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1250.46	0.67%
VN30	1311.26	0.75%
VN Mid	1858.33	0.45%
VN Small	1403.08	0.44%

河內交易所 (HSX)

	收盤	漲跌%
HNI	224.64	0.48%
HN30	479.79	0.88%
VNX AllSh	1301.88	0.69%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	92.74	0.42%

外資交易	成交值 (Bil.VND)
買進	1812.00
賣出	1482.07
買超/賣超	329.92

外資交易	成交值 (Bil.VND)
買進	36.11
賣出	21.45
買超/賣超	14.66

外資交易	成交值 (Bil.VND)
買進	31.56
賣出	16.46
買超/賣超	15.10

上漲排名/ 股碼	漲跌(VND)	漲跌%
BVH	3100	6.98%
DBD	3600	6.82%
BWE	3050	6.78%
MIG	1150	6.78%
BIC	1750	5.29%

上漲排名/ 股碼	漲跌(VND)	漲跌%
IDV	2100	5.45%
TIG	500	3.85%
KSV	1400	3.06%
PVI	1300	2.70%
DHT	2100	2.38%

上漲排名/ 股碼	漲跌(VND)	漲跌%
MSR	505	4.47%
VGI	3671	4.23%
TTN	628	3.51%
FOX	3104	3.29%
VGT	403	2.96%

下跌排名/ 股碼	漲跌(VND)	漲跌%
NOI	-600	-5.61%
YEG	-300	-2.64%
NHA	-750	-2.60%
RAL	-2500	-2.07%
DLG	-40	-2.05%

下跌排名/ 股碼	漲跌(VND)	漲跌%
C69	-200	-3.03%
NRC	-100	-2.44%
DL1	-100	-1.96%
VC2	-100	-1.08%
VFS	-100	-0.68%

下跌排名/ 股碼	漲跌(VND)	漲跌%
CQN	-1654	-4.85%
AVG	-1292	-4.72%
HBC	-119	-2.29%
MZG	-186	-1.74%
BCR	-78	-1.53%

市值排名/ 股碼	Bil.VND
VCB	517,549,851
BID	262,790,095
FPT	205,067,044
CTG	190,097,708
HPG	168,861,005

市值排名/ 股碼	Bil.VND
IDC	18,083,996
PVS	16,203,057
MBS	14,989,168
HUT	14,101,689
THD	13,859,999

市值排名/ 股碼	Bil.VND
ACV	270,094,241
VGI	264,157,155
MCH	158,689,154
BSR	60,707,782
MVN	52,890,704

交易量排名/ 股碼	成交值	30 日均
HPG	21,025,552	19,878,892
SHB	20,652,801	17,529,181
VIX	16,329,421	17,859,157
FPT	13,518,080	4,845,946
DXG	13,264,582	17,510,502

交易量排名/ 股碼	成交值	30 日均
TIG	5,171,719	1,659,963
LIG	5,130,818	278,585
MBS	3,993,080	2,252,700
TNG	3,424,713	1,908,327
SHS	3,263,016	7,842,308

交易量排名/ 股碼	成交值	30 日均
HNG	3,011,058	3,708,794
VGI	1,897,209	1,855,195
VGT	1,831,824	1,116,384
HBC	1,790,909	874,642
DCS	1,632,850	221,022

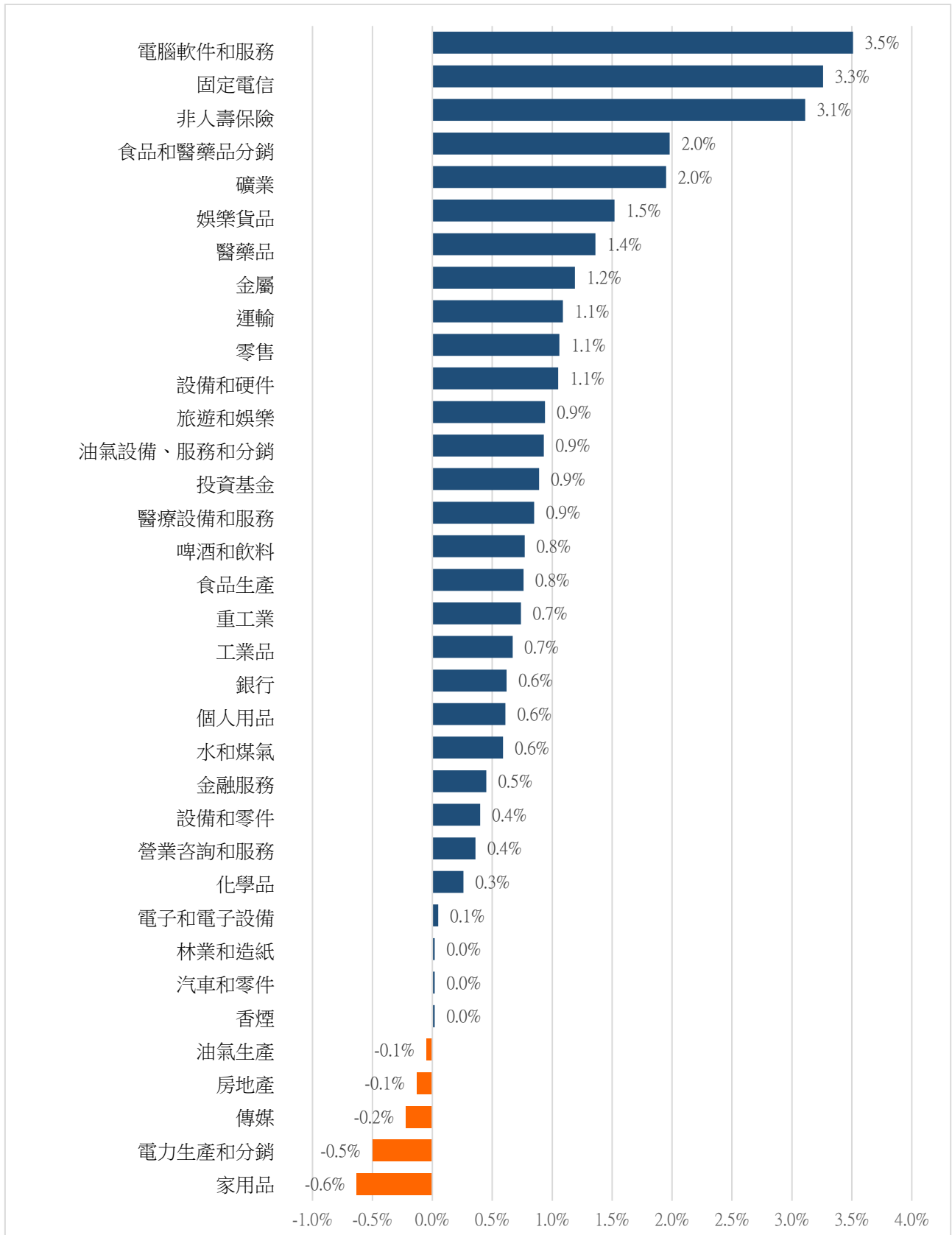
資料源: Bloomberg & Yuanta Research

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各行業板塊的交易走勢



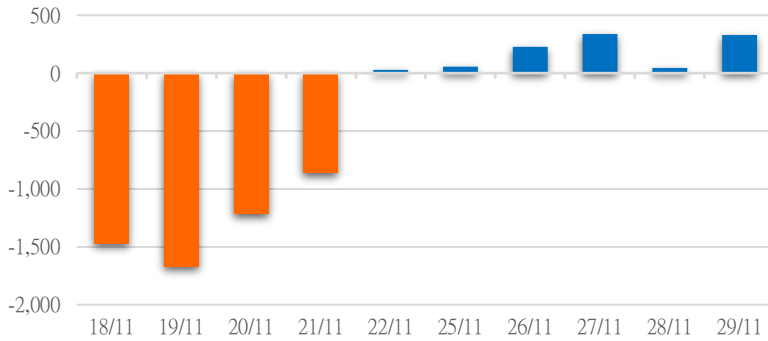
資料源: FinPro - YSVN



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外資買進賣統計

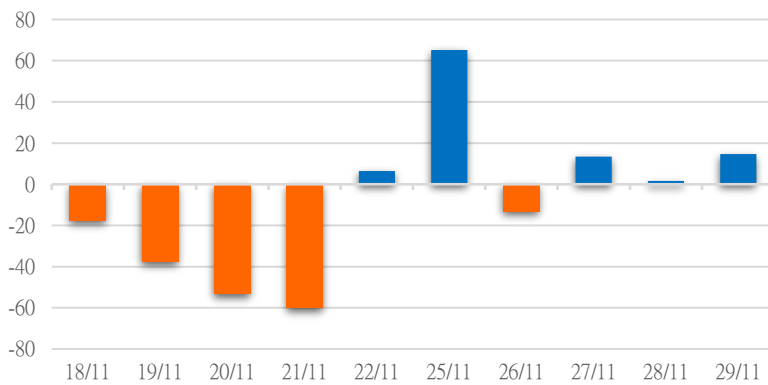
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
FPT	237,030	VRE	-74,994
MSN	88,508	VHM	-53,199
HPG	69,557	HDB	-46,577
CTR	64,185	VCB	-27,085
PNJ	53,964	TCB	-20,247

HSX 外資買/賣超的前 5 名

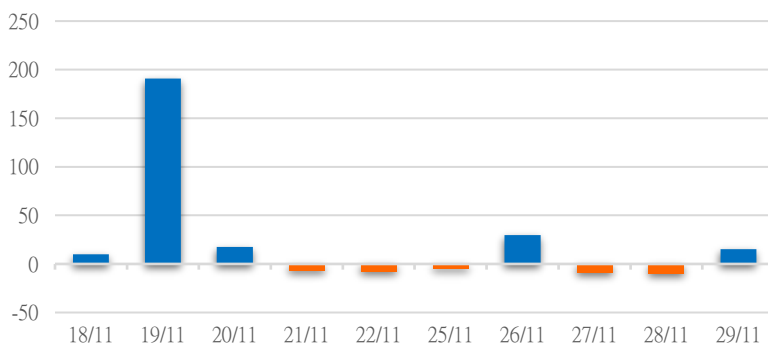
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MBS	8,067	TNG	-4,035
IDC	4,636	IDV	-1,272
PVS	4,422	VGS	-596
DTD	1,439	VC3	-498
TIG	1,207	PSW	-262

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	11,812	VGI	-480
HPP	1,248	AAS	-120
MPC	909	BSR	-59
QNS	595	MSR	-36
VTK	347	GHC	-31

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN



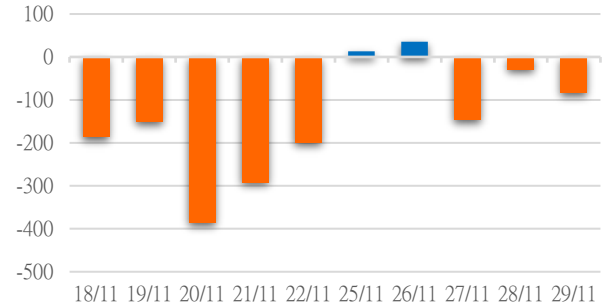
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自營統計

證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
VTP	40,542	PNJ	67,653
FPT	17,936	FUEMAV30	36,459
HPG	11,797	SSI	26,288
TCB	9,900	VIB	22,307
DCM	7,368	BMP	9,797

HSX 自營交易最大前名

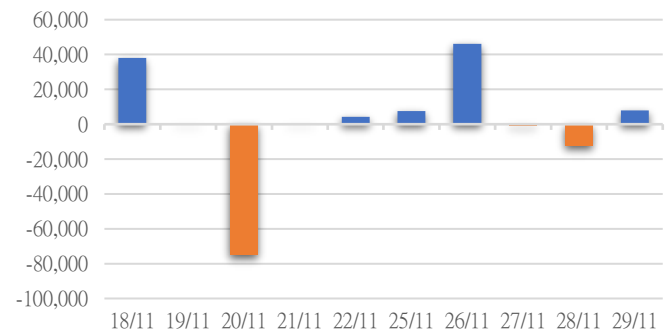
HSX 自營交易每日買/賣超
(Bil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	7,525	TNG	1,232
MBS	1,272	GDW	132
NTP	422		

HNX 自營交易最大前名

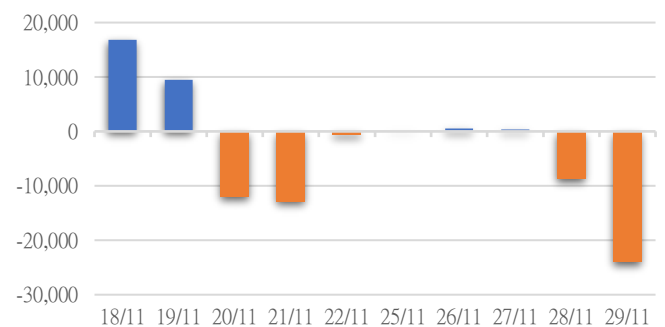
HNX 自營交易每日買/賣超
(Mil.VND)



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
QNS	229.40	VGI	15,390
		SEA	8,120
		MCH	644
		FOX	97
		VCT	1

UPCoM 自營交易最大前名

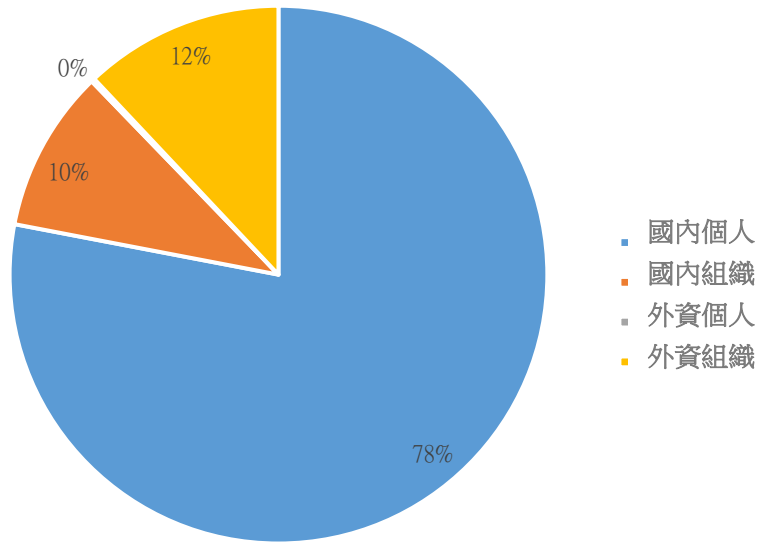
UPCoM 自營交易每日買/賣超
(Mil.VND)





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越南證券市場投資人類別統計

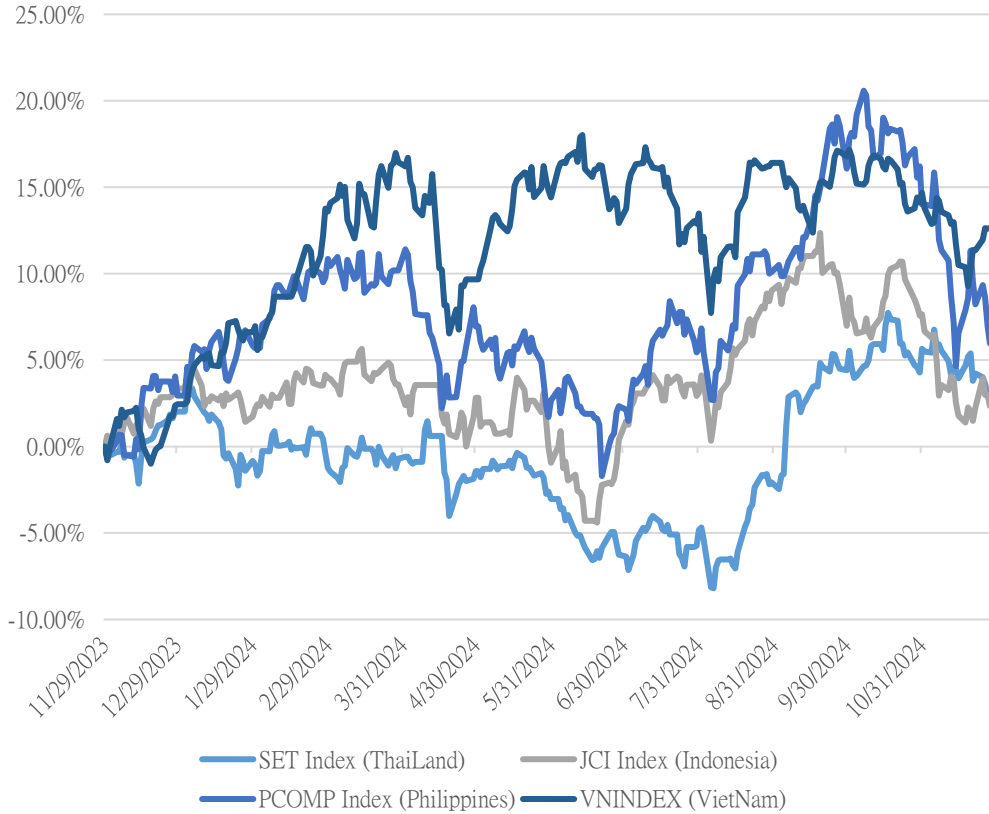


資料源: FiinPro - YSVN



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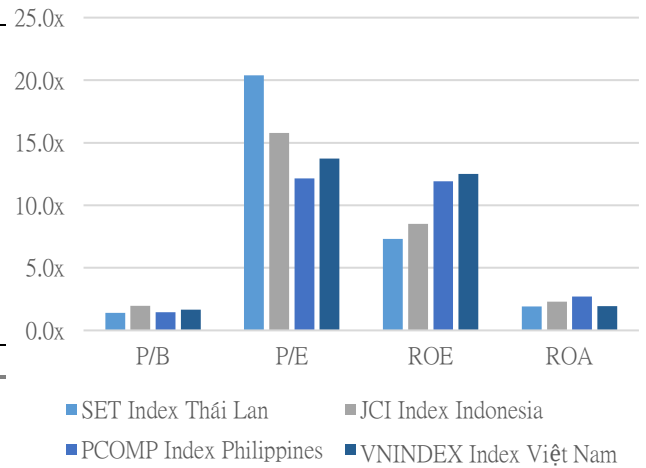
東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	2.0x	1.5x	1.6x
P/E		20.4x	15.8x	12.2x	13.7x
ROE	%	7.31	8.53	11.92	12.50
ROA	%	1.90	2.31	2.70	1.93
Vốn hóa	Tỷ USD	517.65	766.57	155.58	201.67
GTGD	Triệu USD	0.98	0.50	0.07	0.37
LS cổ tức	%	3.34	3.23	2.84	1.84

源: Bloomberg & YSVN



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



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