

當日市場：與世界趨勢下跌同步

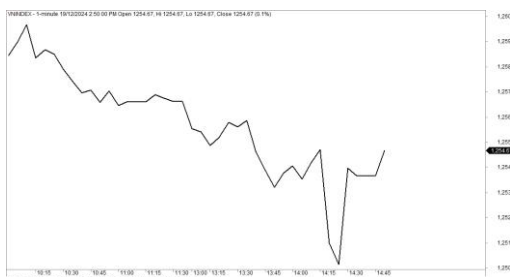
2024/12/20

市場走勢

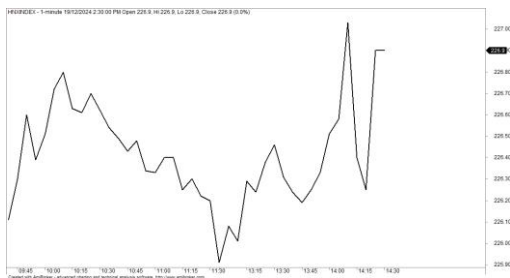
市場指數	VNI	HNI	UPCOM
收盤	1,254.67	227.54	92.73
%日	-0.89%	0.05%	-0.37%
%週	-0.23%	-0.33%	0.36%
%月	4.02%	2.54%	1.56%
%年	15.95%	0.75%	9.65%
<b>成交值(Bil.VND)</b>			
當日	17,792	1,182	1,702
日均量/週	12,498	767	928
日均量/月	13,917	862	791
<b>外資進出</b>			
買進	1,418.09	60.43	17.33
賣出	1,897.69	57.69	22.04
買賣超	-479.60	2.74	-4.71
<b>市場漲跌家數</b>			
上漲	73	57	135
下跌	253	86	167
持平	88	173	601
<b>市場指標</b>			
P/E	13.12	16.42	33.06
總市值 (兆盾)	5,183	336	1,563
股息殖利 <sup>2</sup>	2.24%	3.54%	4.09%

資料源: Bloomberg - YSVN

VNINDEX



HNIINDEX



市場走勢

美國股市在上一交易日出現負面走勢後，市場在盤初的交易日大幅下跌。隨後各類指數逐步復甦並收窄跌幅，VN-Index 收盤下跌 0.89%，止於 1,254.67 點。HNX-Index 上漲 0.05%，Upcom-Index 下跌 0.37%。3 大市場的交易額均增至 20 兆 6,760 億越南盾。

VN30-Index 收盤下跌 1.18%，其中有 2 檔上漲股和 26 檔下跌股。ACB、HPG、HDB、MBB、MSN、SHB、SSB、TCB、TPB、VHM、VIB、VPB、VNM 下跌 1-2%/股。相反，BVH 和 PLX 是指數籃子中小幅上漲的兩檔股票。

儘管紅跌佔主導地位，但大多數股票的跌幅在 1%-2% 附近。在上漲方面，YEG、SAM 漲停，而 NKG (2.35%)、KDH (1.71%)、CSV (2.38%)、SMC (1.52%)、ELC (1.28%)、CMG (1.62%) 等上漲。外資在接近三個交易日出現買賣交替，僅在當日的交易日反轉賣超近 4,830 億越南盾。SSI (1,200 億)、VPB (890 億)、VCB (720 億) 在賣超方面的榜首。相反，FPT (1090 億)、KDH (480 億)、DGC (260 億) 在買超方面領先。

市場短期觀點

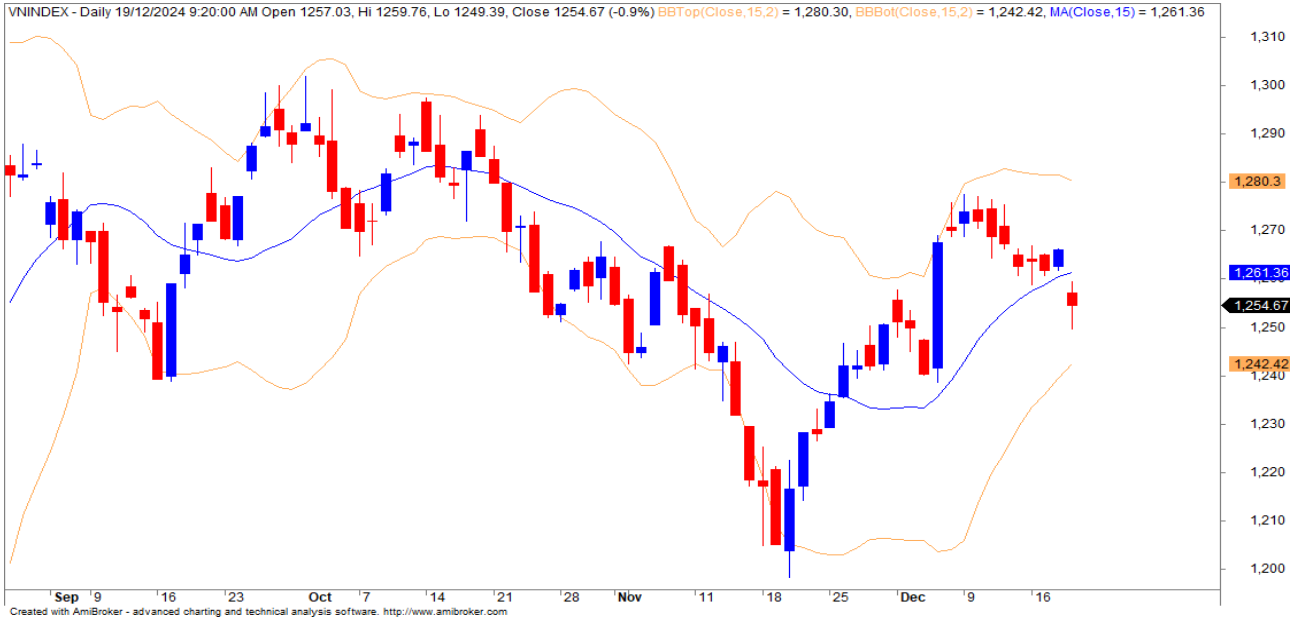
我們認為 VN-Index 在下一交易日可能會繼續在 50 日均線附近震盪。同時，由於等待 ETF 重組交易日的情緒，流動性在盤初的交易日可能仍維持較低水平，市場仍處於短期調整階段，因此現金流可能會在各類股票之間出現分化。在期貨合約到期周和 ETF 投資組合重組中，現金流經常可能會集中於中型股和小型股。當日交易日積極點的是現金流在 HNX 和 Upcom 上的股票出現增加的跡象，顯示現金流沒有撤回的跡象，而是在各類股票之間找機會。

短期策略 (1 個月以內)：大盤的短期走勢仍維持上漲。因此，我們建議投資者在投資組合繼續持有高比例的股票，並在此階段不應賣出。請在 <https://ysradar.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	上漲	中性	1300	1330	870	800
HNX-Index	上漲	中性	260	306	189	160
VN30	上漲	中性	1336	1350	980	960
VNMidcaps	上漲	中性	1280	1250	963	900
VNSmallcaps	上漲	中性	1250	1250	804	750



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胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1254.67	-0.89%
VN30	1314.16	-1.18%
VN Mid	1887.7	-0.83%
VN Small	1435.86	-0.47%

河內交易所 (HSX)

	收盤	漲跌%
HNI	227.54	0.05%
HN30	483.71	0.08%
VNX AllSh	1312.28	-1.02%

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	92.73	-0.37%

外資交易	成交值 (Bil.VND)
買進	1418.09
賣出	1897.69
買超/賣超	-479.60

外資交易	成交值 (Bil.VND)
買進	60.43
賣出	57.69
買超/賣超	2.74

外資交易	成交值 (Bil.VND)
買進	17.33
賣出	22.04
買超/賣超	-4.71

上漲排名/ 股碼	漲跌(VND)	漲跌%
YEG	1150	6.91%
SAM	470	6.86%
VCA	900	6.77%
TDH	140	6.70%
GEE	1900	6.33%

上漲排名/ 股碼	漲跌(VND)	漲跌%
PGN	1300	10.00%
VMC	700	7.53%
DHT	6300	7.00%
PVB	900	2.98%
VC7	300	2.42%

上漲排名/ 股碼	漲跌(VND)	漲跌%
AVG	3438	14.57%
DNW	3484	11.10%
HAF	1200	8.57%
PSB	412	7.63%
SBD	487	6.58%

下跌排名/ 股碼	漲跌(VND)	漲跌%
ABS	-230	-4.54%
SSB	-750	-4.35%
EVG	-280	-4.29%
SGR	-1500	-3.85%
CIG	-310	-3.56%

下跌排名/ 股碼	漲跌(VND)	漲跌%
L14	-1200	-3.30%
TMB	-2200	-2.86%
TVC	-300	-2.83%
DTD	-700	-2.59%
NRC	-100	-2.17%

下跌排名/ 股碼	漲跌(VND)	漲跌%
MTA	-976	-11.09%
KCB	-980	-8.99%
VCR	-1075	-4.27%
SBS	-107	-2.38%
DVN	-526	-2.18%

市值排名/ 股碼	Bil.VND
VCB	520,344,396
BID	267,065,422
FPT	218,747,988
CTG	194,662,201
HPG	174,937,443

市值排名/ 股碼	Bil.VND
IDC	18,809,996
MBS	16,610,705
KSV	16,380,000
PVS	16,298,650
HUT	14,101,689

市值排名/ 股碼	Bil.VND
VGI	275,504,483
ACV	259,094,110
MCH	166,428,286
BSR	68,539,645
MVN	54,647,164

交易量排名/ 股碼	成交值	30 日均
HPG	35,259,336	20,382,434
SSI	30,712,702	13,764,691
SHB	23,041,001	14,847,067
MSB	23,039,300	9,442,090
VPB	21,327,100	19,510,022

交易量排名/ 股碼	成交值	30 日均
SHS	7,025,717	5,392,479
TNG	5,131,646	1,853,932
PVS	4,820,432	2,189,296
CEO	4,513,323	3,095,465
TIG	3,457,635	2,828,731

交易量排 名/股碼	成交值	30 日均
HNG	19,248,367	4,097,756
BMS	16,587,223	186,859
VSF	15,117,743	2,827,194
BSR	5,530,393	3,646,215
DDV	3,065,391	1,584,209

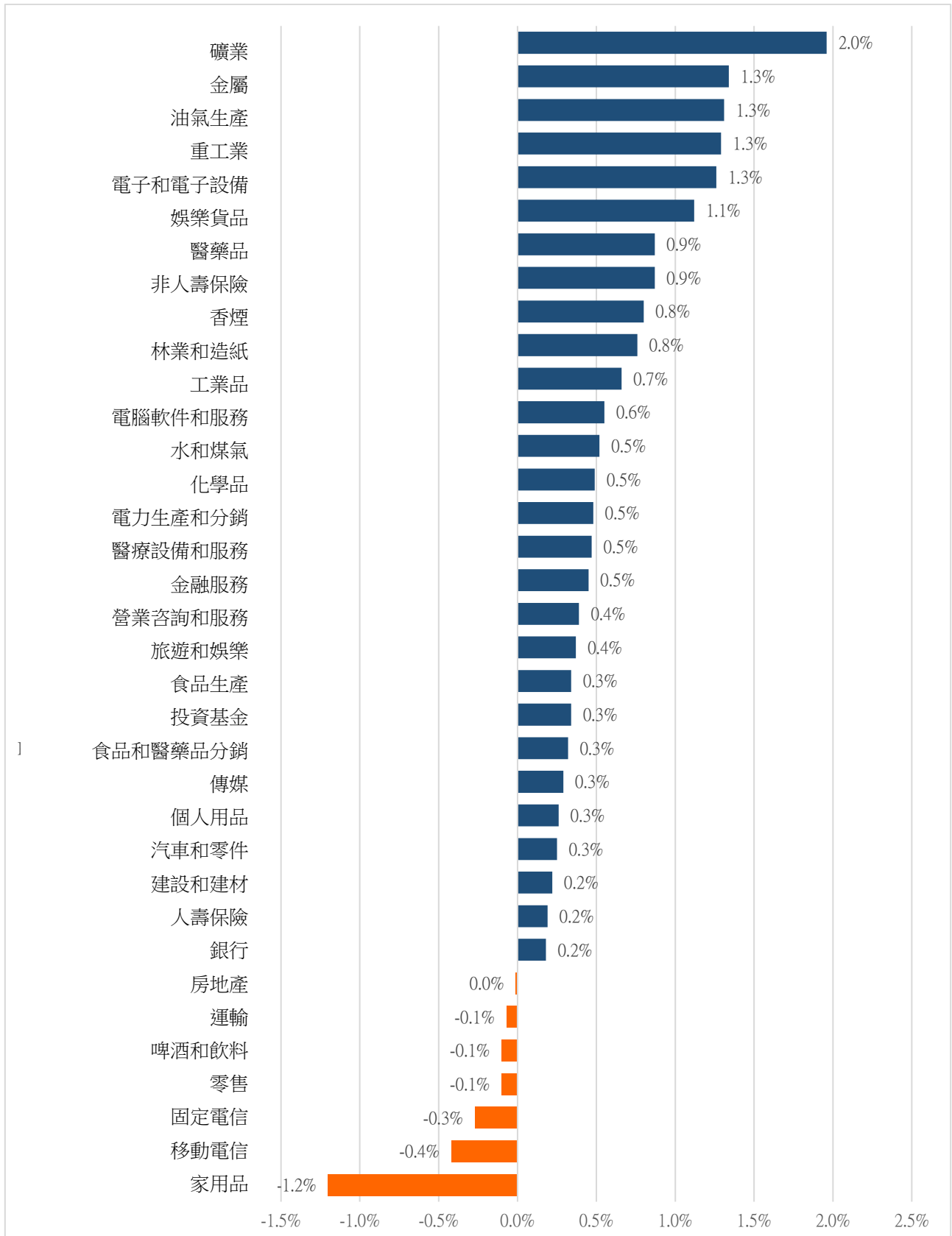
資料源: Bloomberg & Yuanta Research

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### 各行業板塊的交易走勢



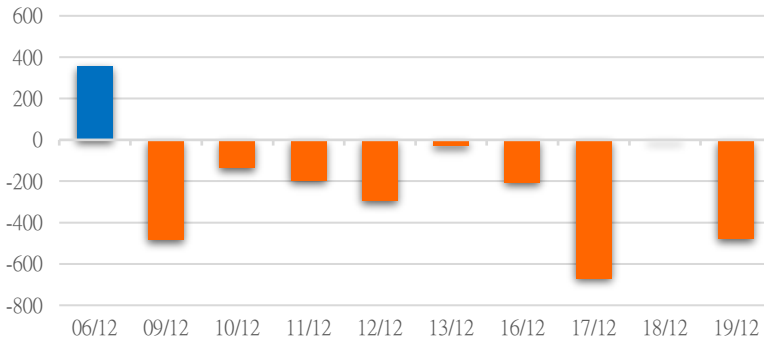
資料源: FinPro - YSVN



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## 外資買進賣統計

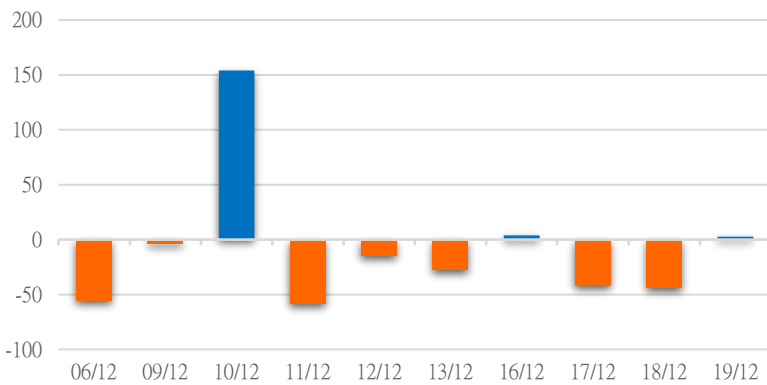
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
FPT	109,380	SSI	-119,712
KDH	48,007	VPB	-89,218
DGC	26,286	VCB	-71,551
HSG	18,330	PDR	-62,408
DBC	18,185	VHM	-42,693

HSX 外資買/賣超的前 5 名

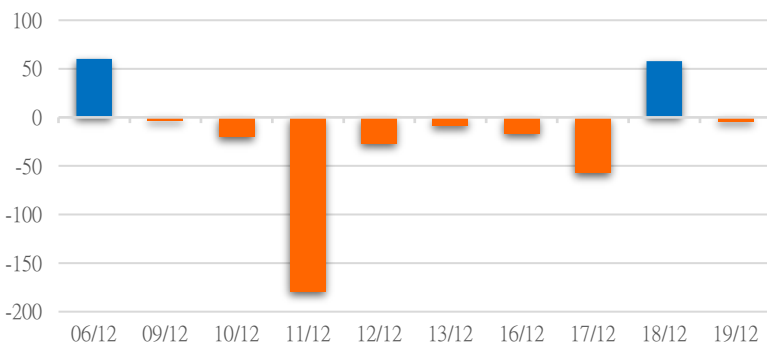
HNX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
PVS	14,865	SHS	-12,619
IDC	9,126	CEO	-11,192
MBS	5,258	NTP	-4,164
TNG	3,423	BVS	-3,377
DHT	1,540	HUT	-2,544

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	8,391	QNS	-8,973
VEA	2,451	ACV	-5,726
GHC	1,196	MCH	-2,170
ABI	552	HNG	-970
MPC	242	BSR	-207

UPCOM 外資買/賣超的前 5 名

源: FiinPro - YSVN

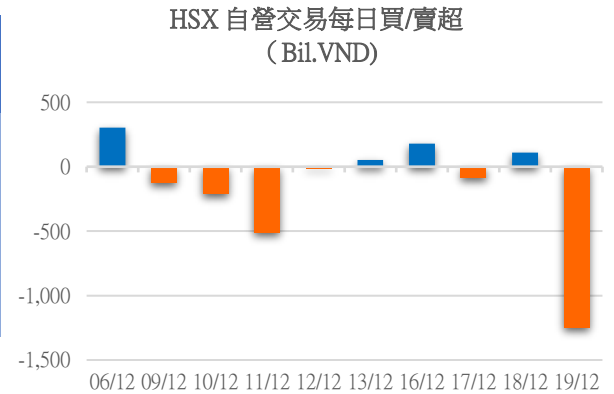


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## 自營統計

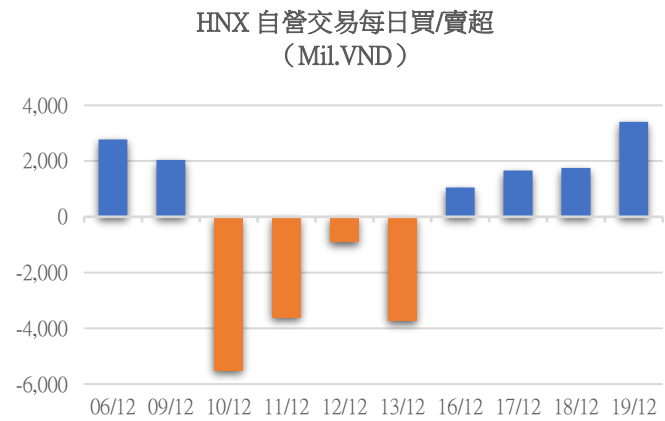
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
FUEMAVND	12,233	FPT	184,113
E1VFN30	12,021	EIB	143,377
FUEVFN30	9,603	TCB	90,152
HAH	8,698	VPB	77,806
CTR	7,290	HPG	77,720

HSX 自營交易最大前名



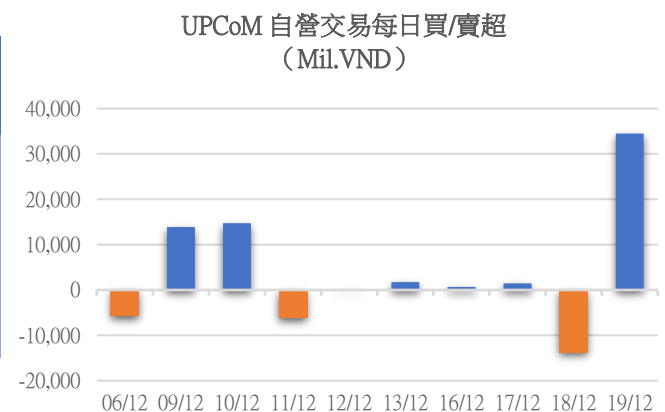
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TNG	3,114	PVS	348
GKM	887	KHS	250

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)
BSR	33,212.50	VGT	1,147
PHP	1,922.64		
FOX	471.95		

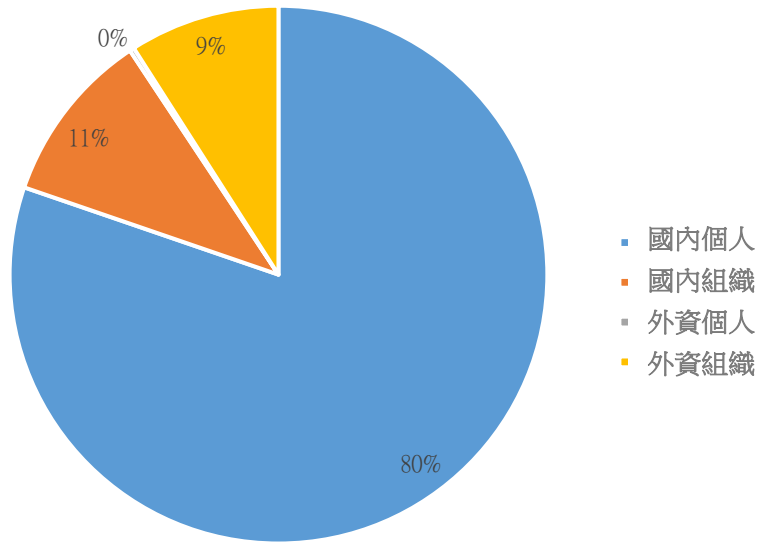
UPCoM 自營交易最大前名





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### 越南證券市場投資人類別統計

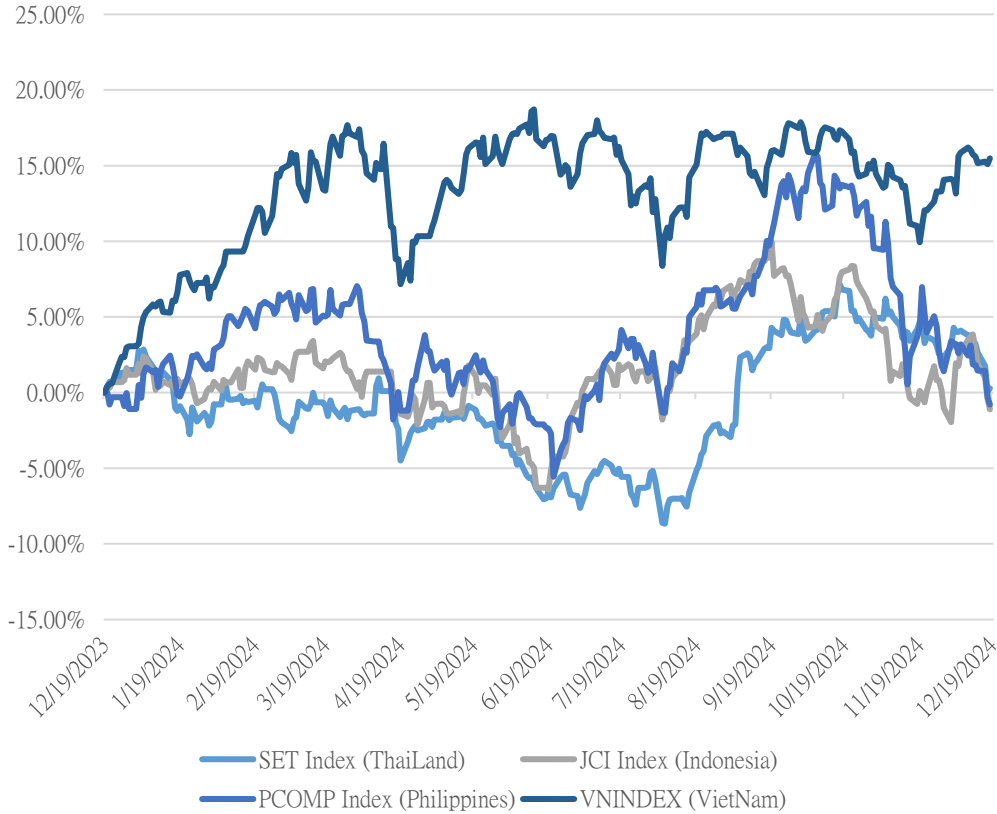


資料源: FiinPro - YSVN



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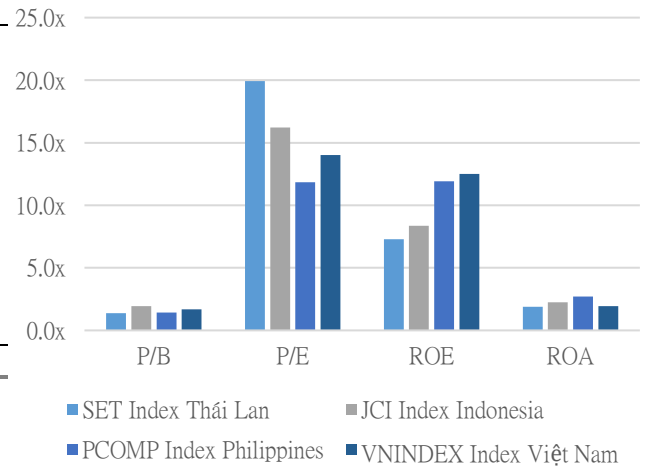
### 東南亞主要市場走勢比較



東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.4x	1.9x	1.4x	1.7x
P/E		19.9x	16.2x	11.9x	14.0x
ROE	%	7.29	8.35	11.92	12.52
ROA	%	1.90	2.25	2.70	1.93
Vốn hóa	Tỷ USD	504.00	756.88	150.66	204.69
GTGD	Triệu USD	1.32	0.50	0.06	0.35
LS cổ tức	%	3.48	3.87	2.98	1.86

源: Bloomberg & YSVN



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





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