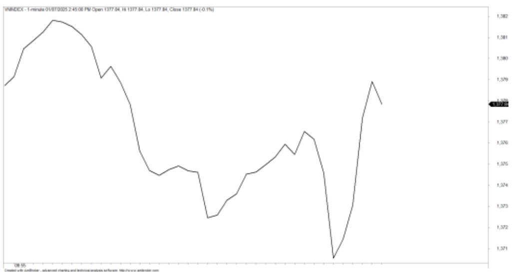
當日市場：市場在午盤處於震盪階段

2025/07/02

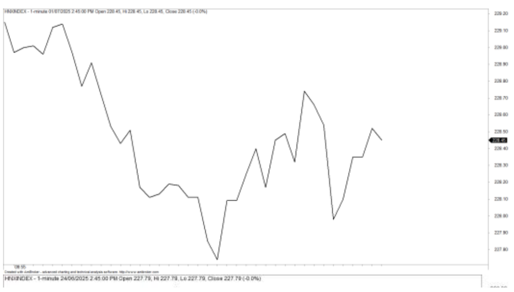
市場走勢			
市場指數	VNI	HNI	UPCOM
收盤	1,377.84	228.45	100.72
%日	0.13%	-0.34%	-0.12%
%週	1.32%	0.79%	1.93%
%月	3.26%	2.69%	2.39%
%年	10.50%	-3.52%	3.38%
成交值(Bil.VND)			
當日	21,034	1,405	486
日均量/週	20,874	1,628	725
日均量/月	20,991	1,686	786
外資進出			
買進	2,090.28	83.87	21.21
賣出	2,455.56	86.60	36.42
買賣超	-365.28	-2.73	-15.21
市場漲跌家數			
上漲	126	72	142
下跌	199	80	165
持平	85	159	596
市場指標			
P/E	13.52	24.94	15.24
總市值 (兆盾)	5,960	360	1,425
股息殖利	7.18%	4.01%	4.86%

資料源: *Bloomberg – YSVN*

VNINDEX



HNXINDEX



市場走勢

市場在當日處於漲跌交替的走勢，儘管 VN-Index 收盤上漲，但下跌股數占主導地位。市場在 1,380 點承受的拋售壓力導致指數收窄漲幅，收於 1,377.84 點。三大市場的成交額比前一交易日小幅增加，達 22 兆 9,250 億越南盾。

其餘指數均收盤下跌，其中 VN30-Index (-0.09%)、VNMID-Index (-0.36%)、VNSML-Index (-0.4%)。現金流集中在銀行業，其中 HDB、MBB、MSB 以及 VIX、VCG 引領市場流動性。

航空、公用事業、銀行、基礎資源板塊在當日上漲，而房地產、證券下跌。

外資賣超超過 3,830 億越南盾，其中 VJC（3,680 億）、HDB（2,190 億）、HPG（940 億）被拋售最多的股票。HVN（700 億）、MSN（610 億）、IDC（590 億）在買超方面領先。

市場短期觀點

我們認為市場可能會在 2025 年 7 月 2 日的交易日中繼續保持上漲勢頭。銀行和保險股在 2025 年 7 月 1 日的交易日中領漲，市場寬度為負。隨著技術指標小幅上漲至超買區域，拋售壓力有增加的跡象，但我們評估短期風險仍然較低，調整階段可能會快速結束。

短期趨勢仍為中性，因此投資者應繼續持有投資組合中 40-50% 的股票比例，並利用調整的機會進行新的購買。

請在 https://ysradar.yuanta.com.vn/查看有關股票的信號。

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

胡志明市交易所 (HSX)

	收盤	漲跌%
VNI	1377.84	0.13%
VN30	1476.16	-0.09%
VN Mid	1988.25	-0.36%
VN Small	1449.16	-0.40%

外資交易	成交值 (Bil.VND)
買進	2090.28
賣出	2455.56
買超/賣超	-365.28

上漲排名/股碼	漲跌(VND)	漲跌%
TLH	360	6.92%
LDG	210	6.91%
ANV	1450	6.86%
TLG	3600	6.84%
NO1	340	4.84%

下跌排名/股碼	漲跌(VND)	漲跌%
DRH	-110	-3.91%
DIG	-600	-3.39%
EVE	-350	-3.18%
SHI	-450	-3.08%
HHS	-450	-2.95%

*備註：市值>5,000 億盾；成交值>15 億盾

市值排名/股碼	Bil.VND
VCB	486,300,290
VIC	365,542,045
VHM	313,395,536
BID	256,981,846
TCB	243,030,900

交易量排名/股碼	成交值	30 日均
SHB	58,548,458	59,164,627
HDB	39,962,747	14,618,716
VIX	28,233,682	34,770,610
MBB	26,515,217	22,245,880
VCG	25,348,753	10,366,801

資料源: BloomBerg & Yuanta Research

河內交易所 (HSX)

	收盤	漲跌%
HNI	228.45	-0.34%
HN30	469.75	-0.51%
VNX AllSh	1427.68	-0.07%

外資交易	成交值 (Bil.VND)
買進	83.87
賣出	86.60
買超/賣超	-2.73

上漲排名/股碼	漲跌(VND)	漲跌%
APS	600	9.84%
API	600	8.70%
IDJ	400	8.51%
HLD	700	5.00%
LHC	2800	3.89%

下跌排名/股碼	漲跌(VND)	漲跌%
VFS	-2400	-9.68%
PVC	-400	-3.39%
CEO	-500	-2.79%
PVS	-800	-2.43%
SVN	-100	-2.22%

市值排名/股碼	Bil.VND
KSV	32,860,000
KSF	19,350,000
PVS	15,342,718
MBS	15,293,304
IDC	15,080,997

交易量排名/股碼	成交值	30 日均
CEO	20,301,999	20,342,564
SHS	7,140,017	14,324,422
PVS	4,913,035	9,316,346
VFS	3,927,833	3,428,457
IDC	3,369,692	1,939,357

資料源: BloomBerg & Yuanta Research

UPCOM 市場 (UPCoM)

	收盤	漲跌%
UPCoM	100.72	-0.12%

外資交易	成交值 (Bil.VND)
買進	21.21
賣出	36.42
買超/賣超	-15.21

上漲排名/股碼	漲跌(VND)	漲跌%
VCR	3263	7.66%
ICN	1671	2.67%
VEF	4721	2.61%
PAT	2028	2.20%
TIN	1044	1.99%

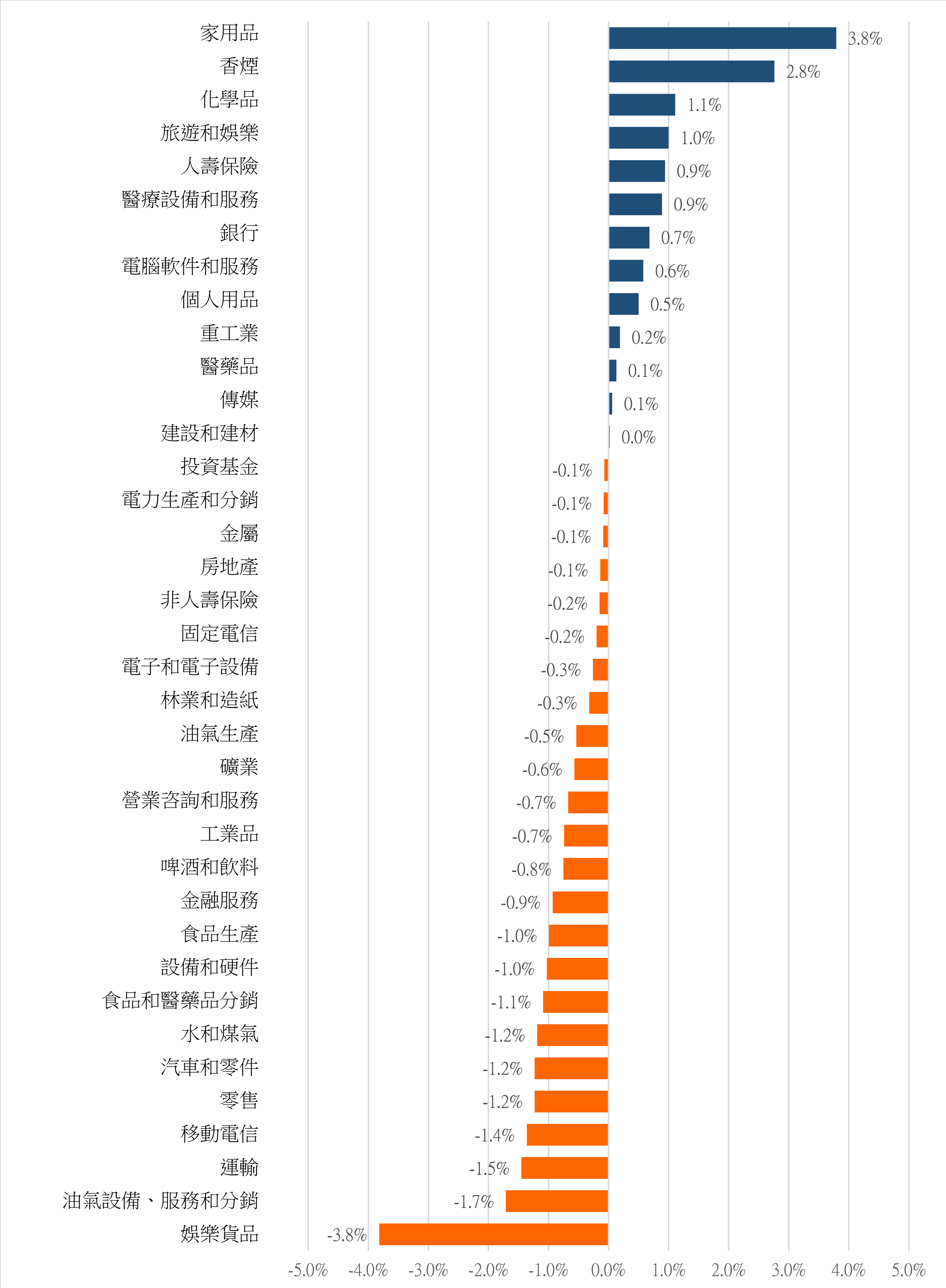
下跌排名/股碼	漲跌(VND)	漲跌%
VGR	-6656	-10.74%
G36	-471	-5.29%
HPP	-3656	-4.39%
MPC	-367	-2.62%
MML	-924	-2.60%

市值排名/股碼	Bil.VND
VGI	223,984,935
ACV	208,625,868
MCH	131,824,421
MVN	71,475,806
VEA	52,077,001

交易量排名/股碼	成交值	30 日均
BVB	2,858,407	3,389,071
G36	2,139,872	1,461,669
ABB	1,855,142	2,759,348
MSR	1,721,412	2,009,011
C4G	1,483,285	1,353,409

資料源: BloomBerg & Yuanta Research

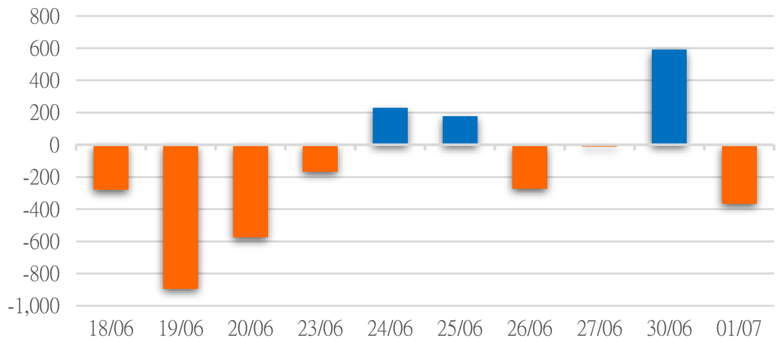
各行業板塊的交易走勢



資料源:: FiinPro – YSVN

外資買進賣統計

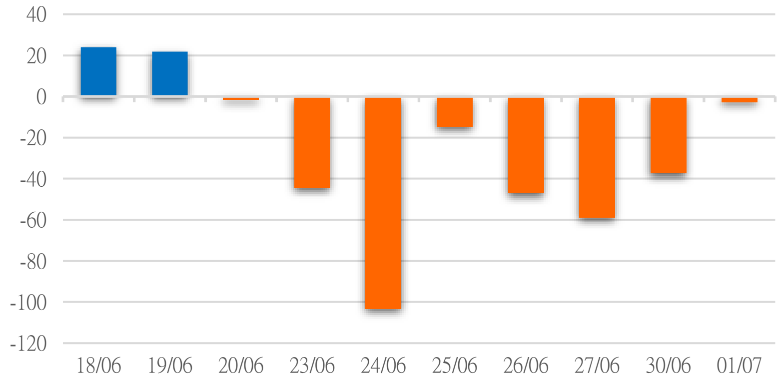
HSX 外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MSN	149,879	HPG	-87,050
NLG	128,512	VHM	-58,384
DBC	105,274	BID	-35,296
VND	99,430	KDH	-32,253
MWG	50,482	SAB	-29,446

HSX 外資買/賣超的前 5 名

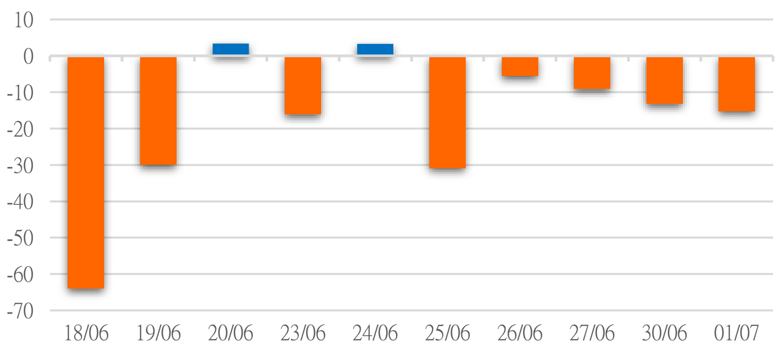
HNX外資每日買/賣超



證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
IDC	12,496	PVS	-44,356
CEO	10,424	MBS	-15,247
LAS	5,451	VFS	-10,073
VGS	4,407	SHS	-3,836
HUT	1,984	TNG	-1,734

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)
ABI	1,777	MCH	-11,580
HPP	1,766	MML	-9,654
DDV	1,720	QNS	-2,330
VEF	1,699	VEA	-1,155
GDA	1,235	TTD	-40

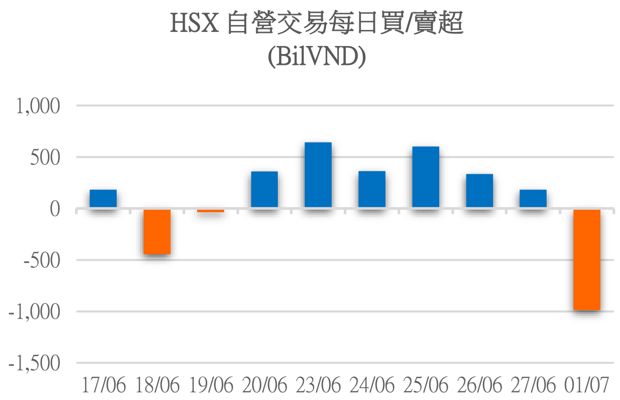
UPCOM 外資買/賣超的前 5 名

源: FiinPro – YSVN

自營統計

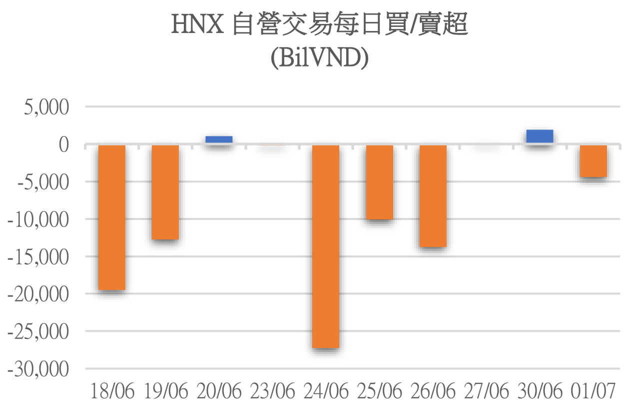
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
TCB	310,250	VHM	37,846
MWG	268,373	VIC	29,570
DGC	95,063	FPT	27,729
PNJ	36,720	VNM	26,864
MSN	23,199	HPG	26,407

HSX 自營交易最大前名



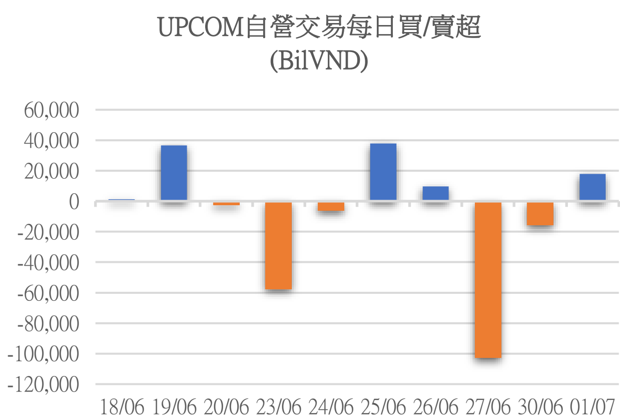
證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
MBS	2,680	NVB	4,563
		TNG	2,150
		DL1	363
		IDC	8

HNX 自營交易最大前名

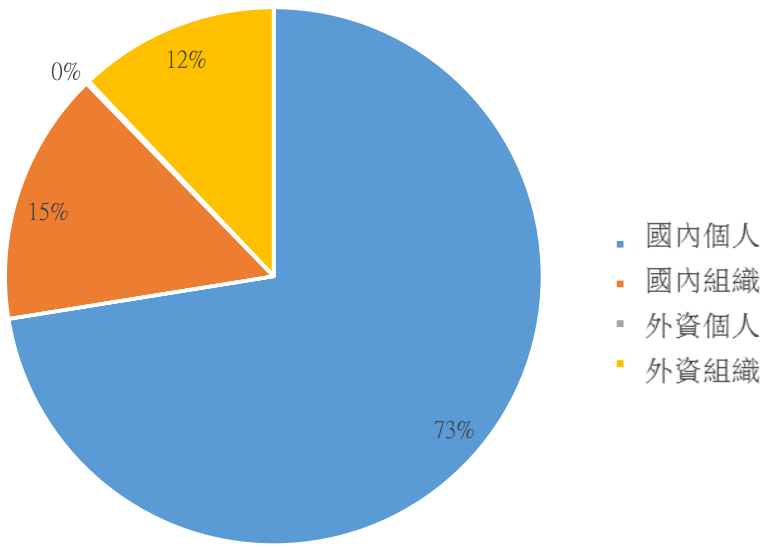


證券代碼	買超金額 (Mil.VND)	證券代碼	賣超金額 (Mil.VND)
ACV	17,895.85		
CKA	6.22		

UPCoM 自營交易最大前名



越南證券市場投資人類別統計

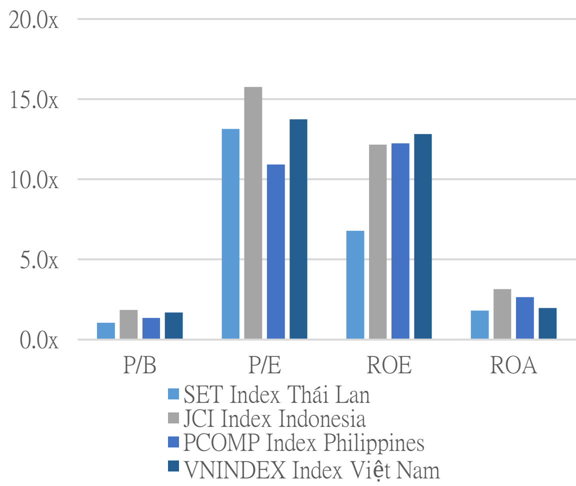


資料源: FiinPro － YSVN

東南亞主要市場數據

		Thailand	Indonesia	Philippines	Vietnam
P/B		1.0x	1.9x	1.4x	1.7x
P/E		13.0x	16.0x	11.0x	13.8x
ROE	%	6.77	12.10	12.25	12.82
ROA	%	1.82	3.13	2.66	1.97
市值	十億美元	417.10	753.08	161.34	226.69
交易價值	百萬美元	1.38	0.75	0.11	0.63
股息率	%	4.45	4.30	3.24	1.88

源： BloomBerg & YSVN



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