當日市場：壓力在尾盤再次加大

2025/10/03

市場指數	VNI	HNX	UPCOM
收盤	1,652.71	269.55	109.79
%日	-0.74	-1.34	0.00
%週	0.46	-1.46	0.13
%月	-1.02	-2.41	-1.09
%年	28.85	15.75	17.70
%從年初開始	31.44	20.13	15.50
成交值（Bil.VND)	22,682	1,540	341
%日	5%	5%	-2%
外資進出			
買進	1,629	26	8
賣出	3,984	70	9
買賣超	-2354.95	-44.43	-1.22
市場漲跌價數			
上漲	89	45	141
下跌	255	98	161
持平	69	161	581
主要指數			
總市值（兆盾）	7,201	458	1,426
P/E	15.01	26.55	15.29
P/B	2.05	1.86	2.27
股息殖利	2.29%	3.19%	4.55%

源：YSVN

市場走勢

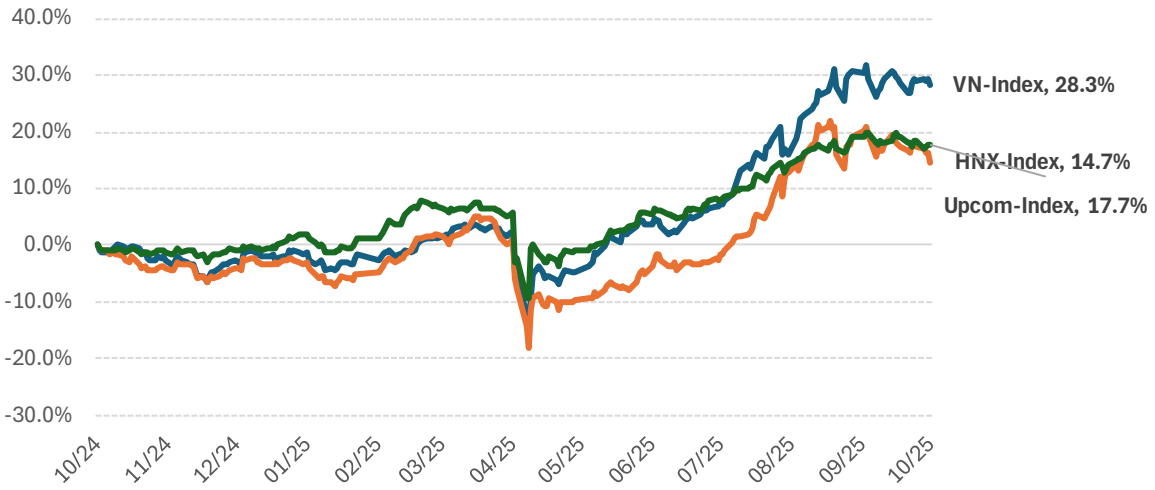
- 市場一度上漲，VN-Index 上漲近 1%，至近 1,880 點，但在尾盤突然被強勁拋售。收盤時，VN-Index 下跌 0.74%、VN30-Index 下跌 0.58%、VNMID-Index 下跌 1.85% 和 VNSML-Index 下跌 0.99%。
- 房地產、銀行、證券、食品飲料等大型行業板塊均下跌，對市場造成壓力，如 VHM（-2.57%）、VPB（-2.43%）、VRE（-4.22%）、VCB（-0.48%）和 FPT（-1.39%）。另一方面，VIC（0.59%）、MBB（1.52%）、TCB（0.78%）、LPB（1.18%）和 VJC（0.55%）等板塊抑制了指數的跌幅。
- 在股票方面，NAF（6.96%）、LSS（6.9%）、CCI（6.85%）和 TNI（6.85%）均上漲相當積極。
- 外資賣超 2 兆 4,010 億越南盾，主要集中在 VHM（3,370 億）、FPT（2,350 億）及 VPB（2,220 億）。相反，LPB（260 億）、CTD（180 億）和 CII（140 億）在買超方面領先。

市場短期觀點

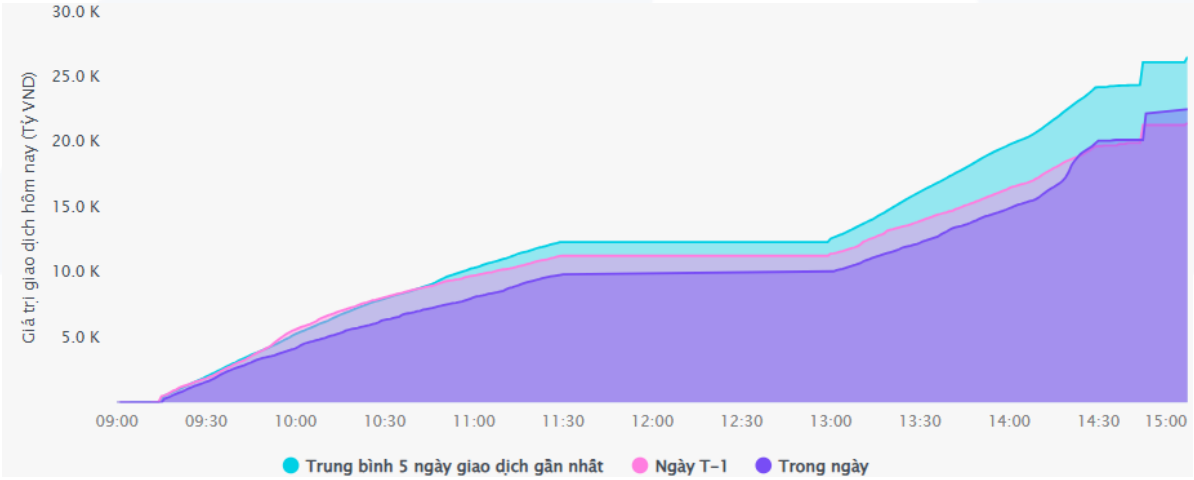
- 我們認為市場可能在下一個交易日重回上漲趨勢。同時，由於市場經歷了較長的調整期，我們預計流動性可能更加積極地改善，中小型股板塊下跌至超賣區域，這顯示低價需求可能在下一個交易日大幅增加。此外，情緒指標持續下跌，顯示投資者對當前市場走勢仍持悲觀態度。
- 短期策略（1 個月以內）：大盤的短期走勢仍維持中性。因此，我們認為投資者可以繼續持有投資組合中 30-50% 的持股比例，並在下一個交易日出現大幅上漲時不應追漲。
- 請在https://ysradar.yuanta.com.vn查看有關股票的信號。

市場統計

關鍵指標的製定



HSX 上的市場流動性



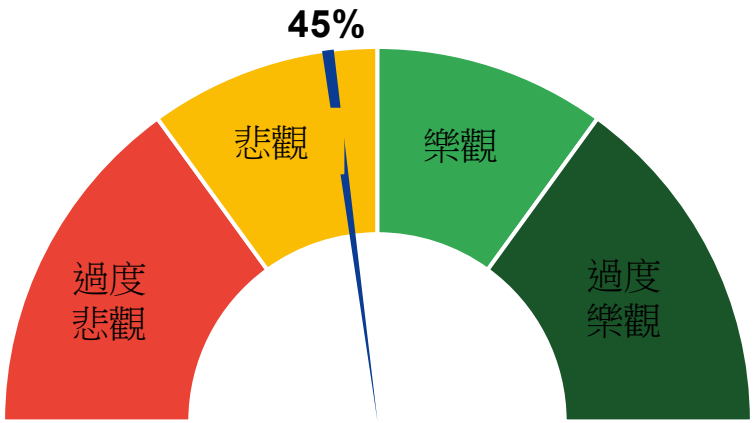
主要指標走勢

	市場走勢							市場趨勢					
	收盤	%日	%週	%月	%年	%從年初開始	總市值（兆盾）	短期趨勢	中期趨勢	阻力區1	阻力區2	支撐區1	
VN-Index	**1,652.71**	-0.74	0.46	-1.02	28.85	31.44	7,201	中性	上漲	1,700	1,720	1,500	1,300
HNX-Index	**269.55**	-1.34	-1.46	-2.41	15.75	20.13	458	中性	上漲	260	306	244	189
Upcom-Index	**109.79**	0.00	0.13	-1.09	17.70	15.50	1,426	中性	上漲	108	116	90	80
VN30-Index	**1,859.80**	-0.58	0.93	0.28	37.66	39.11	5,045	中性	上漲	1,890	1,910	1,500	1,320
VNMidcaps	**2,430.57**	-1.85	-1.14	-3.80	27.27	30.29	1,249	上漲	上漲	2,560	2,580	2,000	1,500
VNSmallcaps	**1,574.16**	-0.99	-1.17	-1.59	10.70	9.57	301	上漲	上漲	1,660	1,750	1,490	1,300

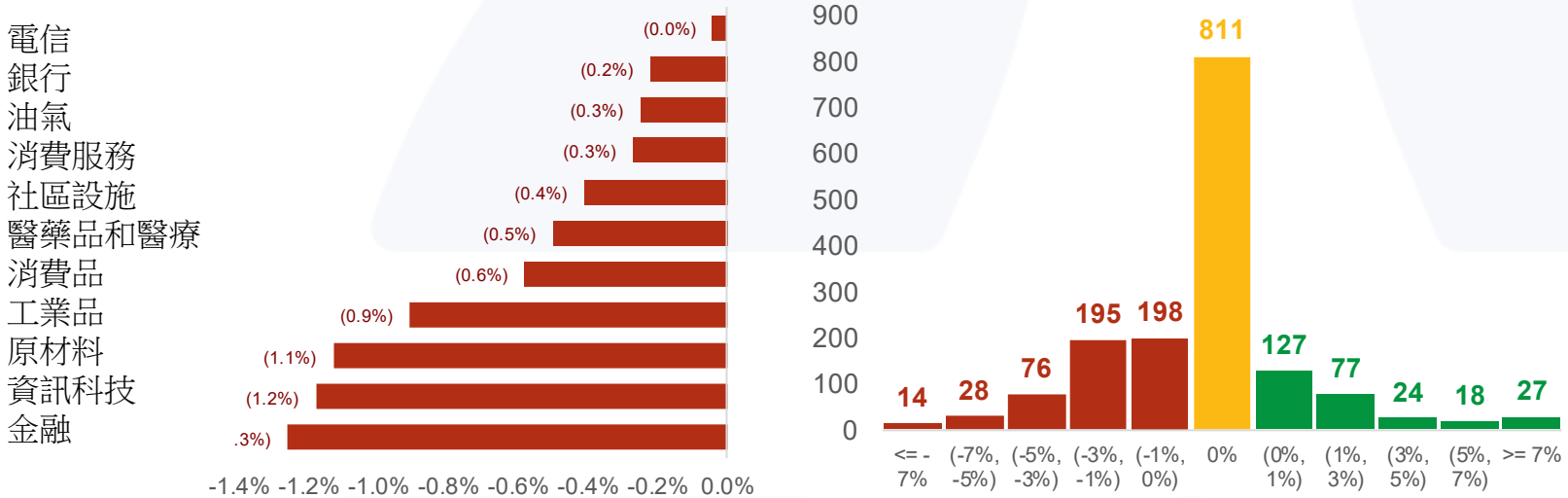
源：YSVN

市場情緒

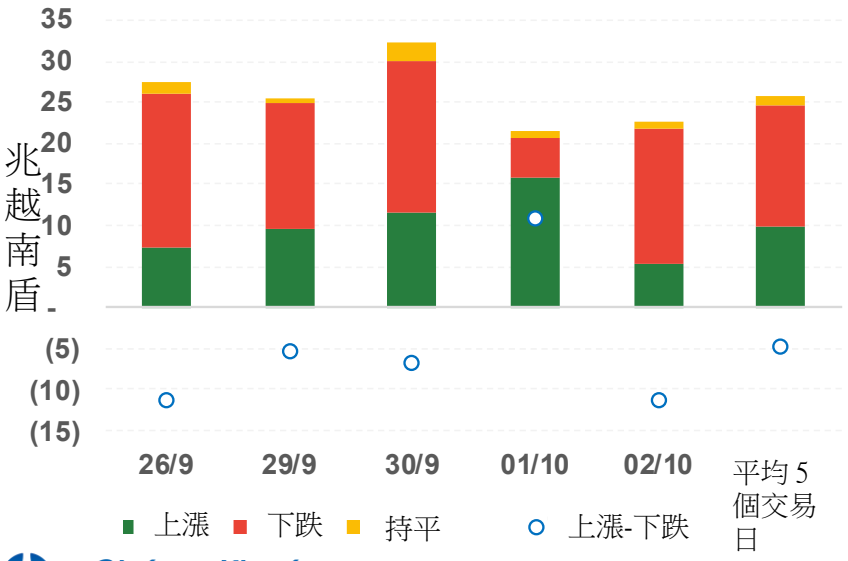
市場情緒指標



市場寬度



現金流分配

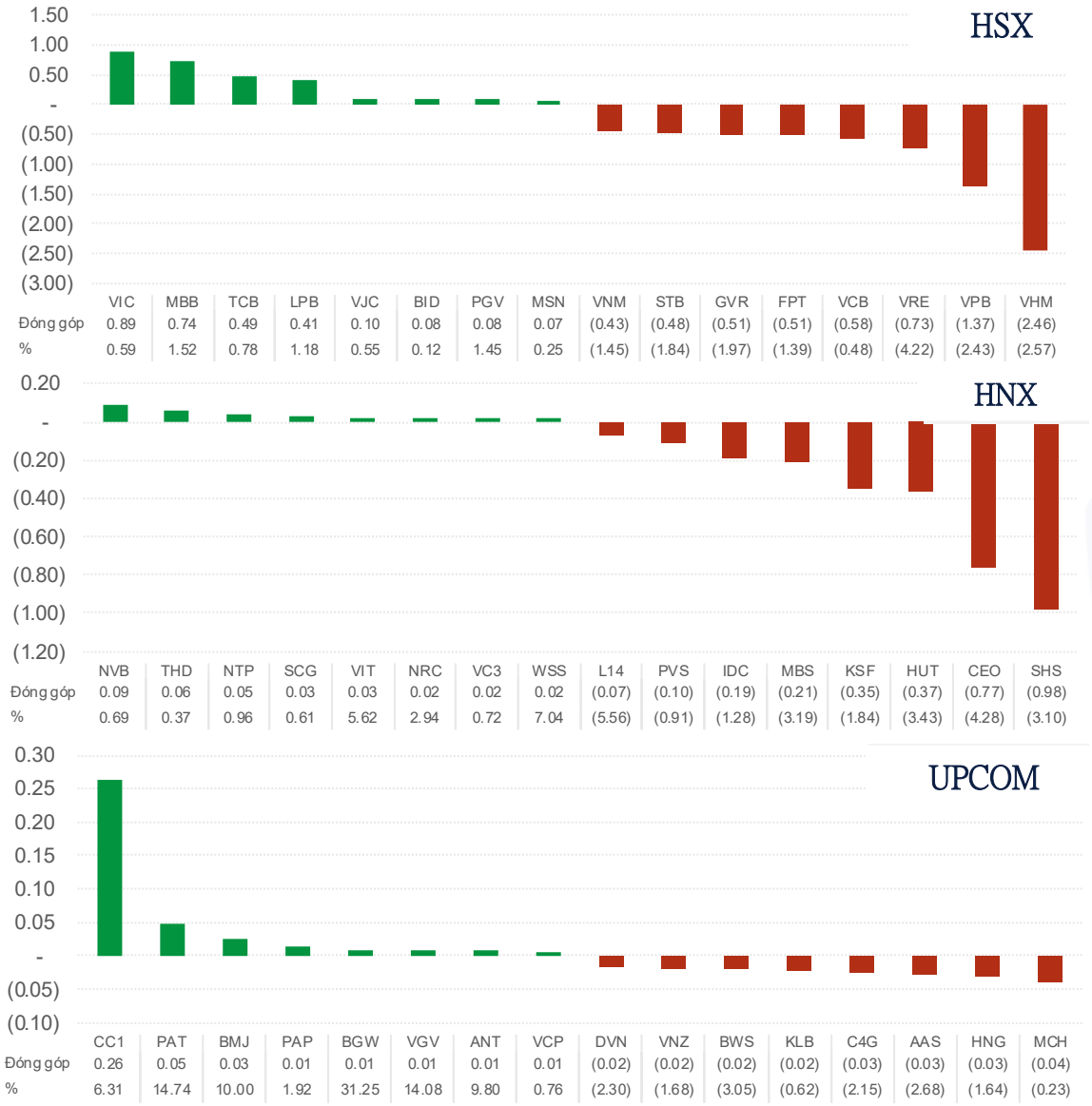


市場情緒指標走勢

源：YSVN

各行業板塊的交易走勢

對指數漲跌貢獻最大的 10 檔股票



對 VN-Index 漲跌貢獻最大的 10 大產業

源：YSVN

行業板塊統計數據

行業板塊波動

行業板塊	%日	%月	%年	%從年初開始	PE	PB	總市值(兆盾)
零售	-0.07	-0.61	17.09	21.54	23.10	3.54	171.15
保險	-0.65	-2.39	36.17	16.31	14.81	1.53	85.46
房地產	-1.18	9.91	113.72	120.51	22.50	2.41	1,825.82
資訊技術	0.32	-7.42	-16.86	-26.24	18.13	3.72	178.90
油氣	0.54	-1.78	2.85	12.61	32.88	1.37	173.06
金融服務	0.51	-7.64	46.46	59.90	25.08	2.14	423.27
電、水和煤氣石油	0.17	-1.68	7.37	9.61	13.80	1.68	438.51
旅遊和娛樂	-0.35	1.61	56.20	36.36	20.21	5.39	348.75
工業品和服務	-0.12	-8.90	0.96	-13.45	16.37	2.55	618.51
個人用品和家用品	0.07	-0.80	0.30	-3.25	10.41	1.35	79.74
化學品	0.32	-3.79	-6.58	0.07	16.23	1.73	243.75
銀行	1.03	-4.91	34.76	35.24	11.06	1.77	2,811.05
汽車和零件	1.15	-18.69	-11.75	-8.77	8.37	1.55	40.55
基礎資源	0.25	3.77	44.03	37.96	20.50	1.61	361.81
食品和飲料	0.85	0.51	8.36	2.53	18.26	2.74	713.54
傳媒	-0.05	9.03	13.60	16.40	68.19	2.27	20.96
電信	0.07	-6.30	8.63	-19.00	28.56	5.32	257.17
建設和建材	0.01	-3.94	1.57	-3.19	11.78	1.58	291.60
醫療	0.15	3.17	16.95	13.09	16.53	1.62	64.56

行業板塊之間的流動性

行業板塊	%日	交易額	1周內平均	1個月平均
汽車和零件	1.2%	391	338	571
銀行	1.0%	6,297	6,966	9,506
食品和飲料	0.9%	1,484	1,585	2,199
油氣	0.5%	247	476	679
金融服務	0.5%	4,363	4,569	6,364
資訊科技	0.3%	713	1,032	1,380
化學品	0.3%	429	502	652
基礎資源	0.3%	1,152	1,799	3,147
電、水和煤氣石油	0.2%	202	324	439
醫療	0.2%	29	91	86
個人用品和家用品	0.1%	109	149	190
電信	0.1%	10	20	30
建設和建材	0.0%	1,173	2,525	2,223
傳媒	-0.1%	28	75	52
零售	-0.1%	507	689	969
工業品和服務	-0.1%	1,507	1,738	1,676
旅遊和娛樂	-0.4%	316	345	427
保險	-0.7%	23	41	57
房地產	-1.2%	4,365	6,545	6,262

源：YSVN

外資買賣統計

HSX

證券代碼	%	買超金額 (Mil.VND)	證券代碼	%	賣超金額 (Mil.VND)
LPB	1.18%	26.1	VHM	-2.57%	(337.1)
CTD	1.37%	17.7	FPT	-1.39%	(234.9)
CII	-4.84%	14.3	VPB	-2.43%	(221.7)
TCB	0.78%	14.0	STB	-1.84%	(172.8)
VJC	0.55%	12.8	MWG	-0.77%	(159.9)

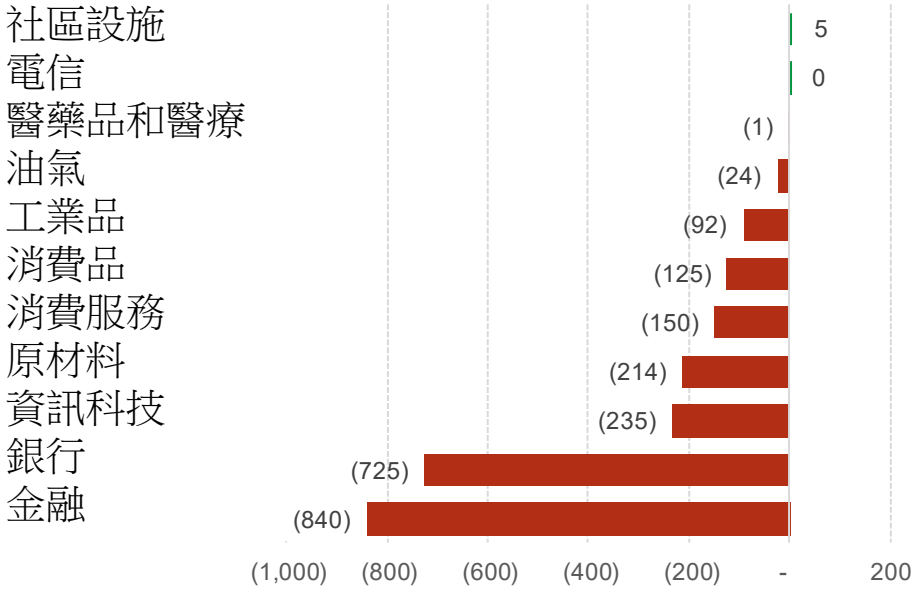
HNX

證券代碼	%	買超金額 (Mil.VND)	證券代碼	%	賣超金額 (Mil.VND)
NTP	0.96%	10.1	SHS	-3.10%	(24.1)
VFS	-1.06%	1.1	IDC	-1.28%	(9.3)
CLH	0.00%	1.1	HUT	-3.43%	(7.9)
SGC	-2.71%	1.0	NRC	2.94%	(3.3)
SLS	-0.52%	0.5	DTD	-2.27%	(3.1)

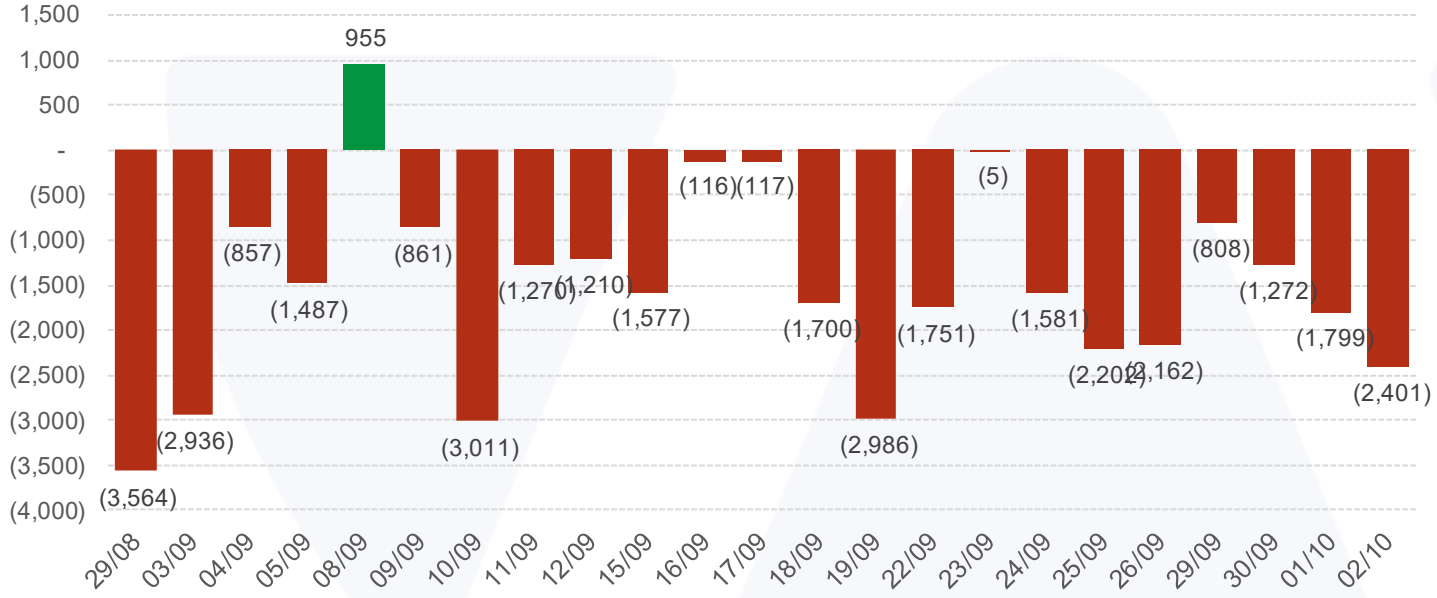
UPCOM

證券代碼	%	買超金額 (Mil.VND)	證券代碼	%	賣超金額 (Mil.VND)
VEA	0.15%	2.6	MCH	-0.54%	(5.6)
F88	-0.54%	1.2	VVS	5.27%	(0.2)
SBB	-3.03%	0.9	AAS	-0.45%	(0.2)
ABB	0.93%	0.3	PAT	3.14%	(0.2)
MSR	1.58%	0.1	ACV	-0.40%	(0.1)

按行業板塊的外資交易



最近上個月的外資交易



單位：十億越南盾

源：YSVN

自營統計

3 大市場買進賣出自營交易

HSX

證券代碼	收盤	差異	買超金額	證券代碼	收盤	差異	賣超金額
VHM	98,600	-2.57%	103.9	VSC	28,050	-4.75%	(37.0)
MBB	26,800	1.52%	58.7	LPB	51,600	1.18%	(21.9)
SHB	17,000	0.29%	51.2	VRE	31,750	-4.22%	(20.9)
MWG	77,100	-0.77%	38.8	VIC	171,000	0.59%	(16.4)
VPB	30,150	-2.43%	22.2	VNM	61,200	-1.45%	(10.2)

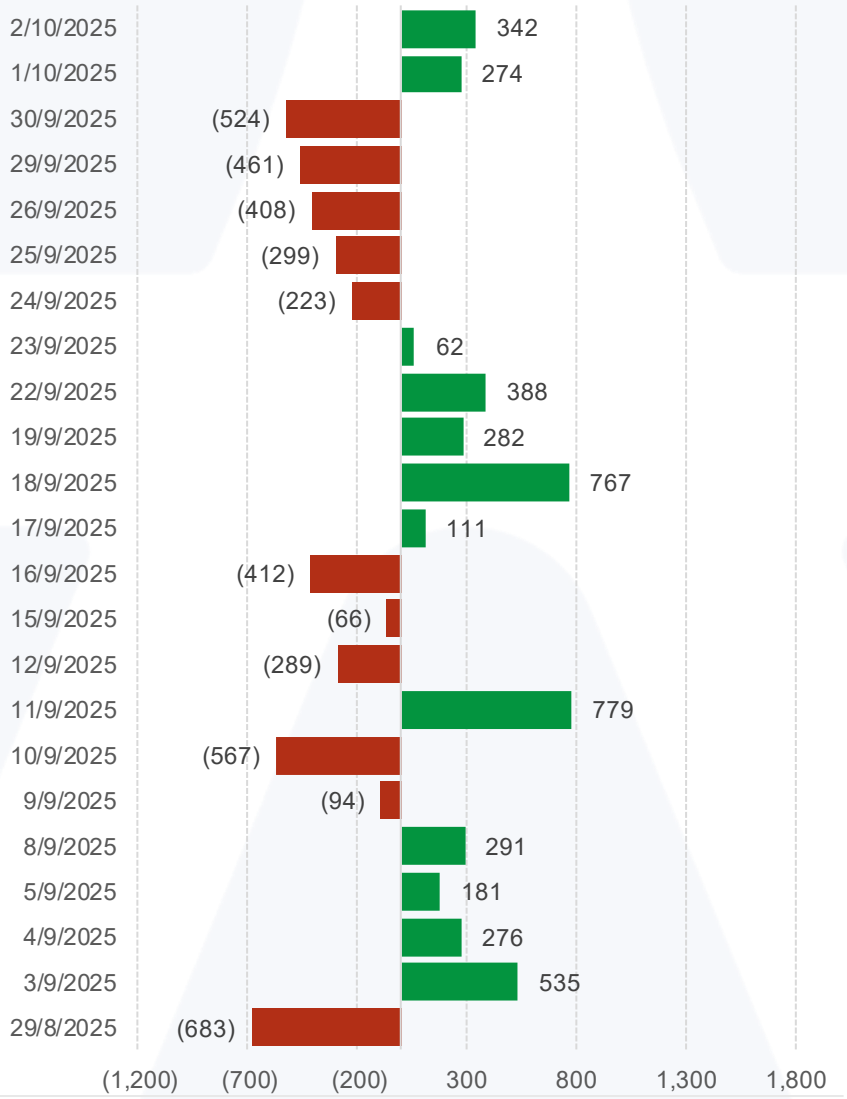
HNX

證券代碼	收盤	差異	買超金額	證券代碼	收盤	差異	賣超金額
IDC	38,600	-1.28%	0.1	PVS	32,500	-0.91%	(9.0)
			-	MBS	33,400	-3.19%	(2.7)
			-				-
			-				-
			-				-

UPCOM

證券代碼	收盤	差異	買超金額	證券代碼	收盤	差異	賣超金額
			-				-
			-				-
			-				-
			-				-
			-				-

最近 1 個月的淨自營交易



單位：十億越南盾

源：YSVN

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