當日市場：房地產股激漲

2025/10/14

市場指數	VNI	HNX	UPCOM
收盤	1,765.12	275.35	112.70
%日	1.01	0.63	0.98
%週	6.18	2.96	2.38
%月	6.35	-0.36	1.12
%年	35.85	18.30	20.57
%從年初開始	37.95	20.31	17.41
成交值（Bil.VND)	44,554	3,416	753
%日	31%	52%	-3%
外資進出			
買進	4,372	198	28
賣出	5,615	125	19
買賣超	-1242.24	72.87	9.56
市場漲跌價數			
上漲	126	57	109
下跌	194	96	189
持平	94	151	584
主要指數			
總市值（兆盾）	7,638	465	1,440
P/E	15.91	26.92	15.44
P/B	2.17	1.88	2.29
股息殖利	3.04%	3.18%	4.37%

源：YSVN

市場走勢

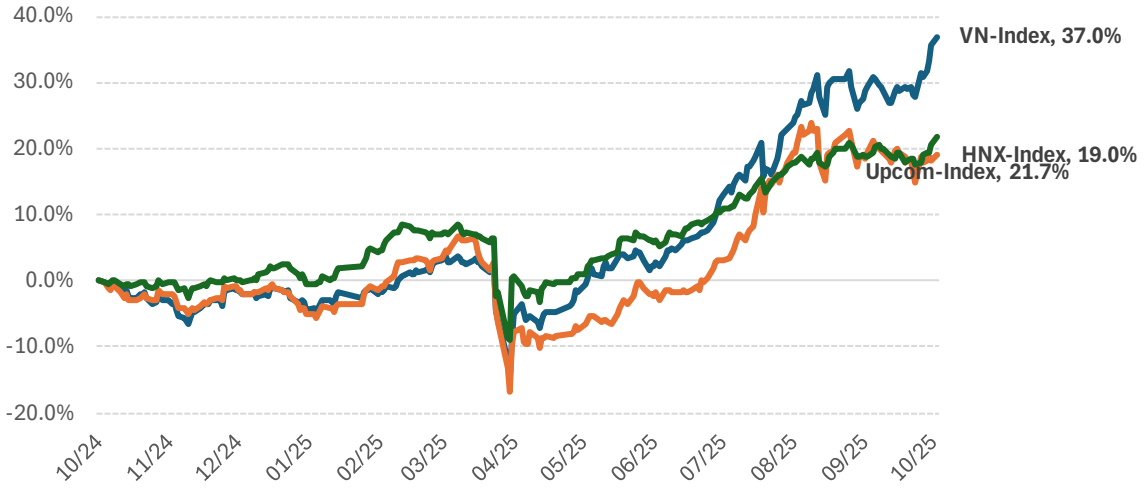
- 面對全球股市的大幅下跌走勢，越南股市表現相當穩定。VN-Index 開盤下跌約 10 點，隨後反轉上漲至尾盤。VN-Index 收盤上漲 1.01%，至 1765.12 點，並創歷史新高。VN30-Index 上漲 1.6%、VNMID-Index 上漲 0.21%、VNSML-Index 下跌 0.2%。
- VIC（6.98%）在連續第二個交易日繼續大幅上漲，並收於 205,400 越南盾，創下歷史新高。此外，TCB（4.96%）、VRE（6.57%）、VJC（6.9%）、VHM（0.98%）和 CTG（1.45%）對指數做出了積極影響。相反，VCB（-1.71%）、HPG（-2.03%）、FPT（-2.19%）和 VPB（-1.25%）是受到負面影響最大的股票。
- HDC、CII、CRV、RYG 均漲停，MDG（5.56%）、HDG（5.37%）和 CTS（5.29%）是當日在 HOSE 上領漲的股票。在房地產板塊中，許多企業公佈了第三季度業績，帶動股價大幅上漲。
- 外資賣超 1 兆 1,600 億越南盾，主要集中在 HPG（3,650 億）、VRE（3,570 億）及 VHM（3,540 億）。相反，VIC（2,730 億）、SHB（1,710 億）和 VNM（1,140 億）在買超方面領先。

市場短期觀點

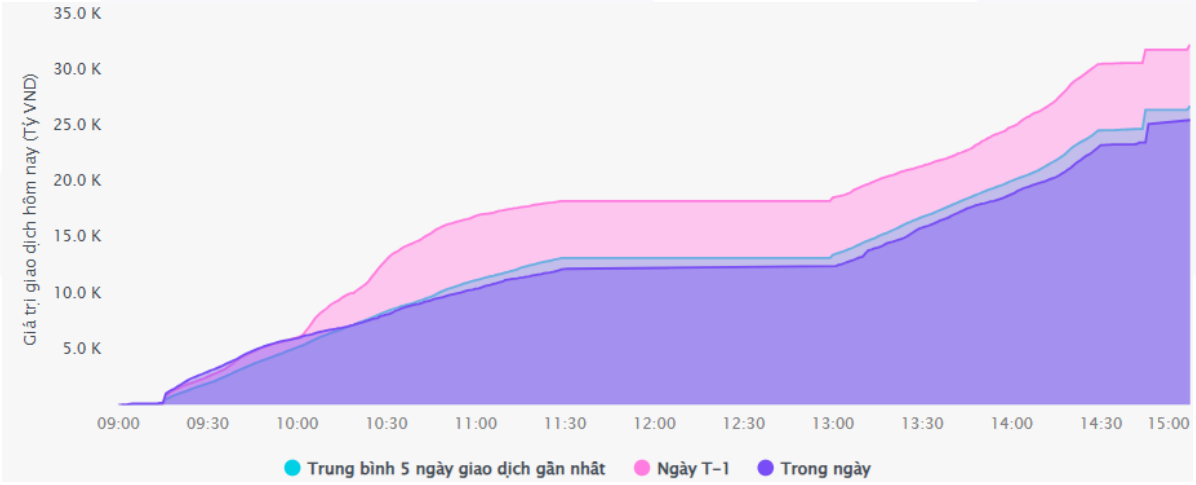
- 我們認為，市場在下一個交易日可能會繼續上漲。同時，流動性再次增加，並可能在未來的幾個交易日均勻分佈於各類股票，但當大型股和中型股的上漲趨勢更加明顯時，則仍可能吸引主要的現金流。此外，橫盤情緒指標顯示投資者情緒仍不明顯。
- 短期策略（1 個月以內）：大盤的短期趨勢仍維持上漲。因此，我們建議投資者可以繼續持有投資組合中 30-50% 的持股比例，並在調整期間逐步增加股票比例。
- 請在https://ysradar.yuanta.com.vn查看有關股票的信號。

市場統計

關鍵指標的製定



HSX 上的市場流動性



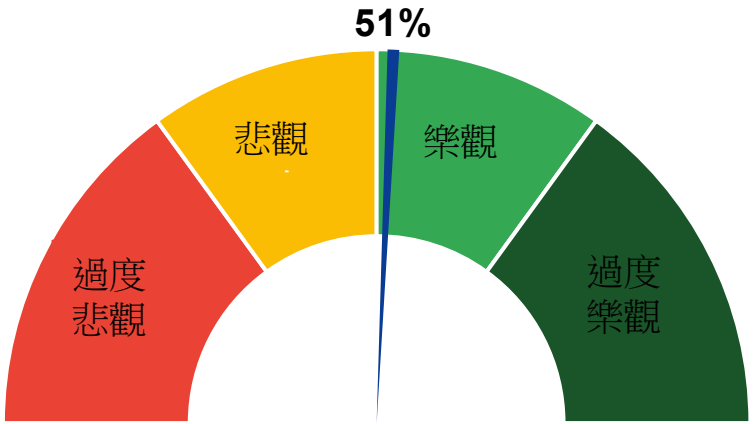
主要指標走勢

	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	支撐區2
VN-Index	**1,765.12**	1.01	4.11	5.87	37.00	39.34	7,716	上漲	上漲	1,700	1,720	1,500	1,300
HNX-Index	**275.35**	0.63	0.24	-0.42	19.01	21.07	468	上漲	上漲	260	306	244	189
Upcom-Index	**112.70**	0.98	3.24	2.37	21.71	18.56	1,447	上漲	上漲	108	116	90	80
VN30-Index	**2,012.28**	1.60	4.86	7.87	47.69	49.64	5,460	上漲	上漲	1,890	1,910	1,500	1,320
VNMidcaps	**2,518.66**	0.21	1.23	-0.67	30.58	32.51	1,295	上漲	上漲	2,560	2,580	2,000	1,500
VNSmallcaps	**1,584.35**	-0.20	-0.69	-1.64	11.47	9.19	303	上漲	上漲	1,660	1,750	1,490	1,300

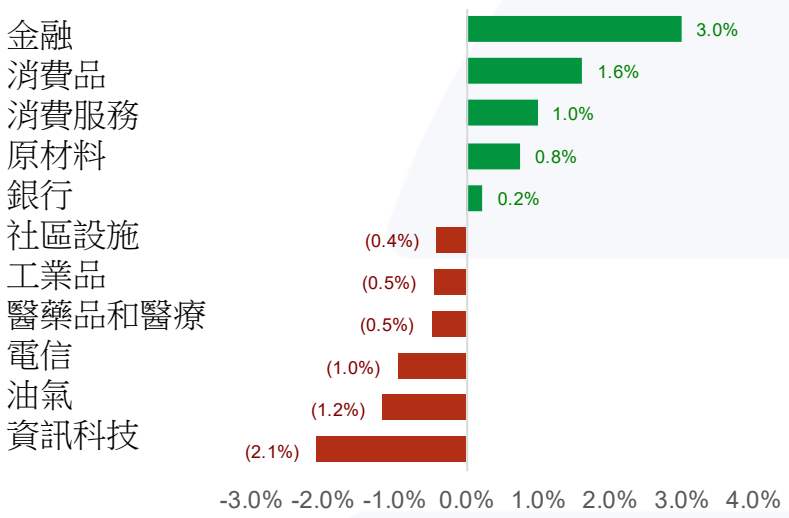
源：YSVN

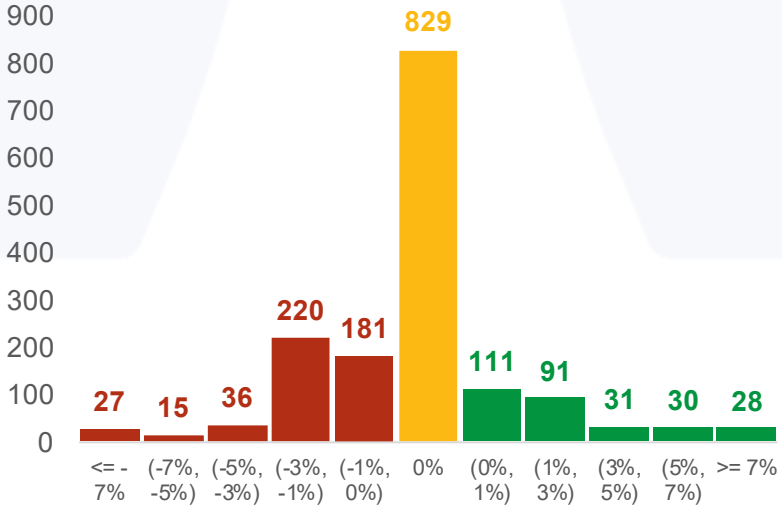
市場情緒

市場情緒指標

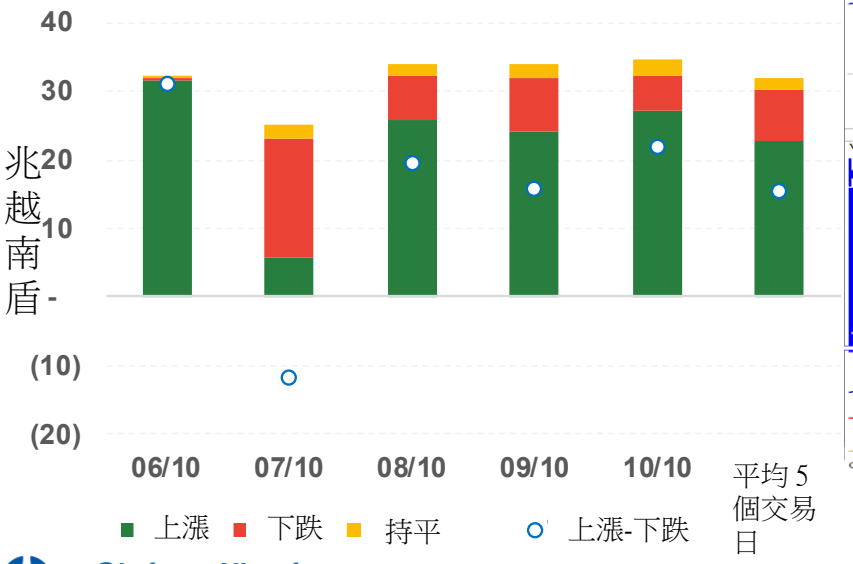


市場寬度





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

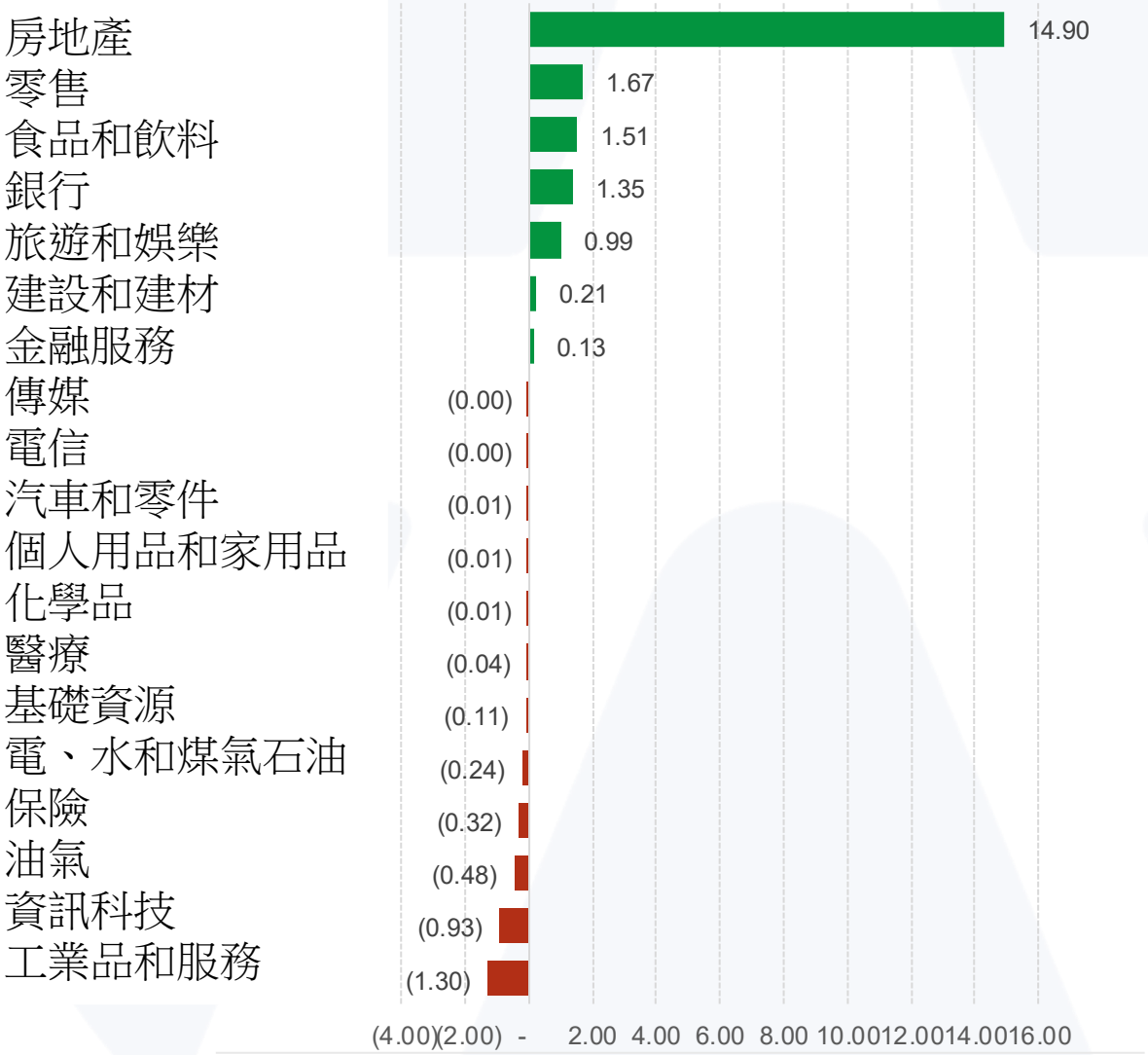
對指數漲跌貢獻最大的 10 檔股票

	VIC	TCB	VRE	VJC	VHM	CTG	VNM	HDB	BSR	BVH	HVN	BID	VPB	FPT	HPG	VCB
Đóng góp	11.90	3.18	1.39	1.27	1.14	0.99	0.77	0.65	(0.25)	(0.29)	(0.36)	(0.49)	(0.73)	(0.83)	(1.06)	(2.12)
%	6.98	4.96	6.57	6.98	0.98	1.45	2.56	2.51	(1.20)	(3.12)	(1.38)	(0.73)	(1.25)	(2.19)	(2.03)	(1.71)

	CEO	SHS	IDC	PGS	HGM	DTD	L40	BKC	EVS	NTP	PVI	VFS	VCS	HUT	NVB	PVS
Đóng góp	1.81	0.37	0.23	0.12	0.10	0.06	0.05	0.04	(0.04)	(0.05)	(0.05)	(0.05)	(0.07)	(0.12)	(0.17)	(0.31)
%	9.85	1.13	1.57	5.49	3.70	4.09	5.26	9.96	(2.78)	(0.94)	(2.01)	(2.26)	(1.44)	(1.16)	(1.35)	(2.74)

	MCH	MSR	VBB	VEF	PGB	AAS	AIG	MZG	HAF	APF	BVB	ABB	VEA	KLB	CC1	QNS
Đóng góp	1.04	0.15	0.06	0.06	0.06	0.06	0.03	0.03	(0.01)	(0.02)	(0.02)	(0.03)	(0.04)	(0.05)	(0.06)	(0.08)
%	5.48	12.93	1.72	4.89	2.37	5.50	3.33	4.79	(11.63)	(4.53)	(0.69)	(0.78)	(1.25)	(1.23)	(1.30)	(1.47)

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	1.20	7.90	27.37	28.46	24.39	3.74	180.79
保險	-0.69	-0.63	34.21	15.46	14.69	1.52	84.76
房地產	4.72	21.93	142.88	143.89	24.97	2.66	2,033.90
資訊技術	1.83	-4.56	-17.99	-24.28	18.61	3.82	183.61
油氣	1.19	2.17	7.79	18.18	34.44	1.43	181.31
金融服務	0.08	0.23	53.43	63.96	25.44	2.19	433.92
電、水和煤氣石油	0.10	-0.78	7.76	10.07	13.83	1.68	439.46
旅遊和娛樂	2.21	7.28	66.86	45.47	21.66	5.74	371.18
工業品和服務	0.77	-5.64	-1.31	-14.36	16.51	2.58	624.29
個人用品和家用品	0.21	0.04	2.97	-2.19	10.52	1.36	80.75
化學品	0.23	-1.12	-5.24	0.59	16.30	1.74	244.81
銀行	0.51	2.81	39.21	39.95	11.42	1.82	2,902.33
汽車和零件	0.32	-23.33	-16.67	-15.54	8.41	1.56	40.75
基礎資源	1.67	3.11	48.32	42.80	21.17	1.66	373.82
食品和飲料	1.52	4.52	11.52	5.67	18.77	2.82	733.76
傳媒	-0.41	1.93	13.68	15.42	67.57	2.24	20.75
電信	0.09	-4.10	7.29	-18.91	28.58	5.33	257.38
建設和建材	0.47	-2.71	1.77	-3.41	11.73	1.57	290.56
醫療	0.28	1.92	17.30	13.28	16.53	1.62	64.55

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
房地產	4.7%	6,940	5,921	5,853
旅遊和娛樂	2.2%	467	598	466
資訊科技	1.8%	863	814	1,239
基礎資源	1.7%	2,594	2,147	2,454
食品和飲料	1.5%	2,523	2,161	2,102
零售	1.2%	1,078	1,134	960
油氣	1.2%	745	538	576
工業品和服務	0.8%	2,099	1,694	1,634
銀行	0.5%	10,059	9,814	8,599
建設和建材	0.5%	2,373	1,825	2,098
汽車和零件	0.3%	299	299	468
醫療	0.3%	47	101	85
化學品	0.2%	550	498	564
個人用品和家用品	0.2%	158	121	162
電、水和煤氣石油	0.1%	270	259	356
電信	0.1%	27	20	24
金融服務	0.1%	5,917	6,857	5,621
傳媒	-0.4%	25	24	46
保險	-0.7%	41	34	41

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)
VIC	6.98%	273.1	HPG	-2.03%	(365.3)
SHB	0.56%	170.8	VRE	6.57%	(356.8)
VNM	2.56%	113.5	VHM	0.98%	(353.7)
HDB	2.51%	92.9	MBB	-0.36%	(306.5)
MWG	1.22%	86.4	MSN	1.07%	(219.0)

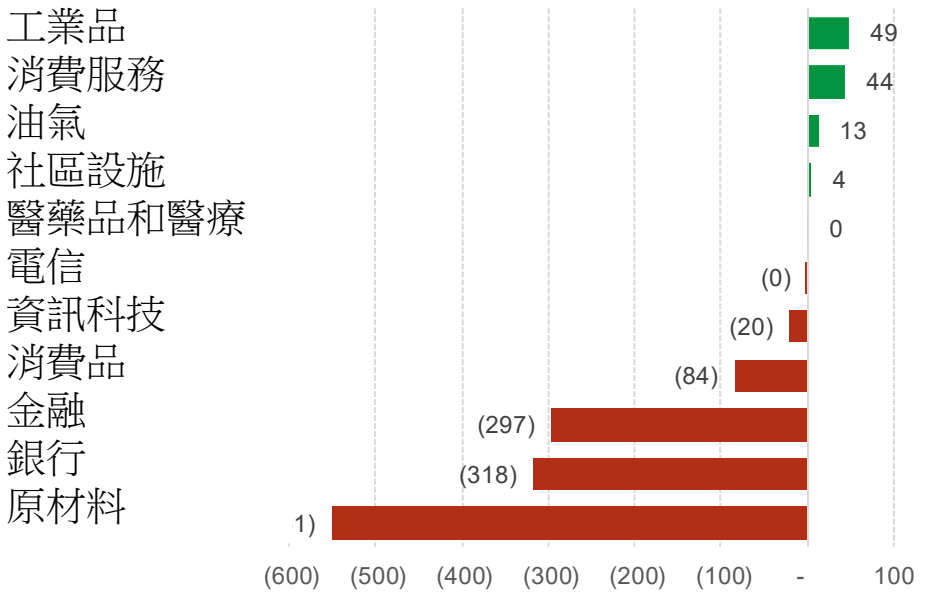
HNX

證券代碼	%	買超金額 (Mil.VND)	證券代碼	%	賣超金額 (Mil.VND)
CEO	9.85%	139.7	SHS	1.13%	(43.2)
DTD	4.09%	2.0	PVS	-2.74%	(11.0)
HUT	-1.16%	0.9	VFS	-2.26%	(4.0)
TIG	1.19%	0.6	IDC	1.57%	(3.6)
L14	3.15%	0.6	MBS	-0.57%	(3.4)

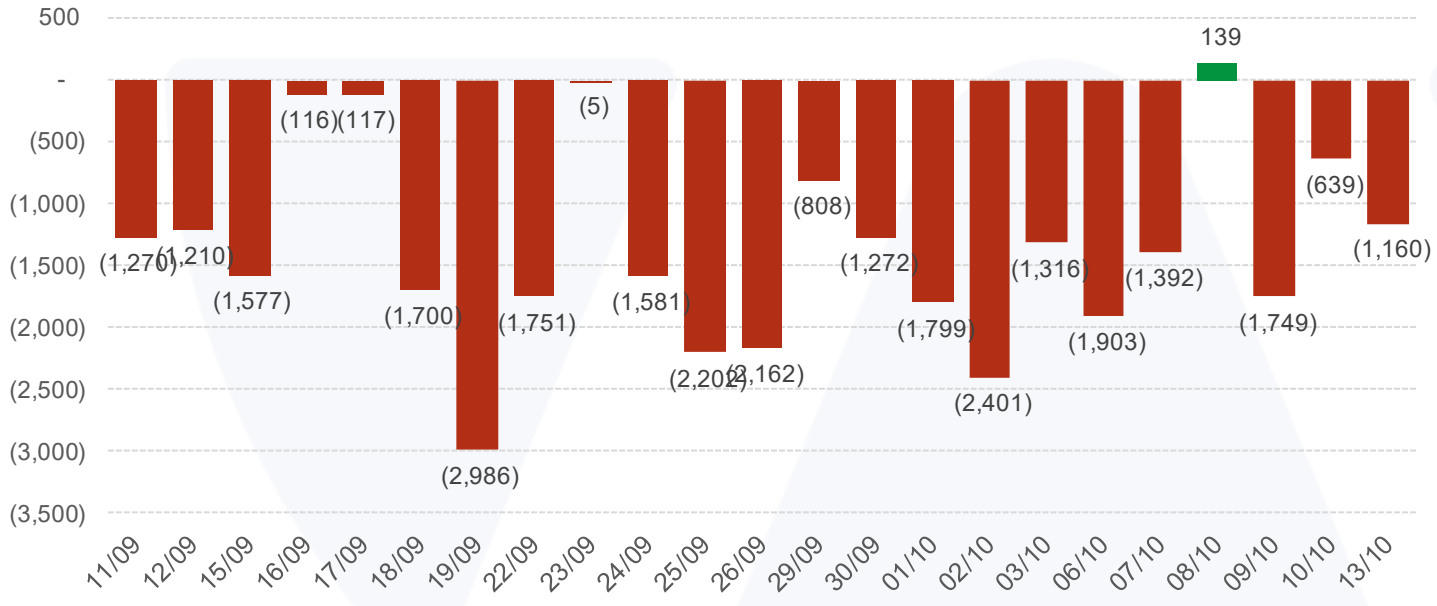
UPCOM

證券代碼	%	買超金額 (Mil.VND)	證券代碼	%	賣超金額 (Mil.VND)
MCH	6.11%	17.6	QNS	-0.69%	(7.6)
ABB	-0.24%	1.9	ACV	-1.55%	(3.2)
HNG	-1.69%	1.1	PAT	0.13%	(0.5)
GCF	-0.03%	0.2	MML	2.57%	(0.4)
CSI	-0.91%	0.2	TTN	-2.57%	(0.2)

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	124,200	0.98%	79.7	**FPT**	94,000	-2.19%	(225.2)
VIC	205,400	6.98%	58.7	**HDB**	32,650	2.51%	(152.5)
ACB	26,750	-0.74%	45.3	**MWG**	83,000	1.22%	(83.5)
VPB	31,700	-1.25%	27.7	**STB**	61,000	0.99%	(57.8)
E1VFVN30	35,350	1.55%	10.4	**TCB**	41,300	4.96%	(45.8)

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
			-				-
			-				-
			-				-
			-				-
			-				-

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
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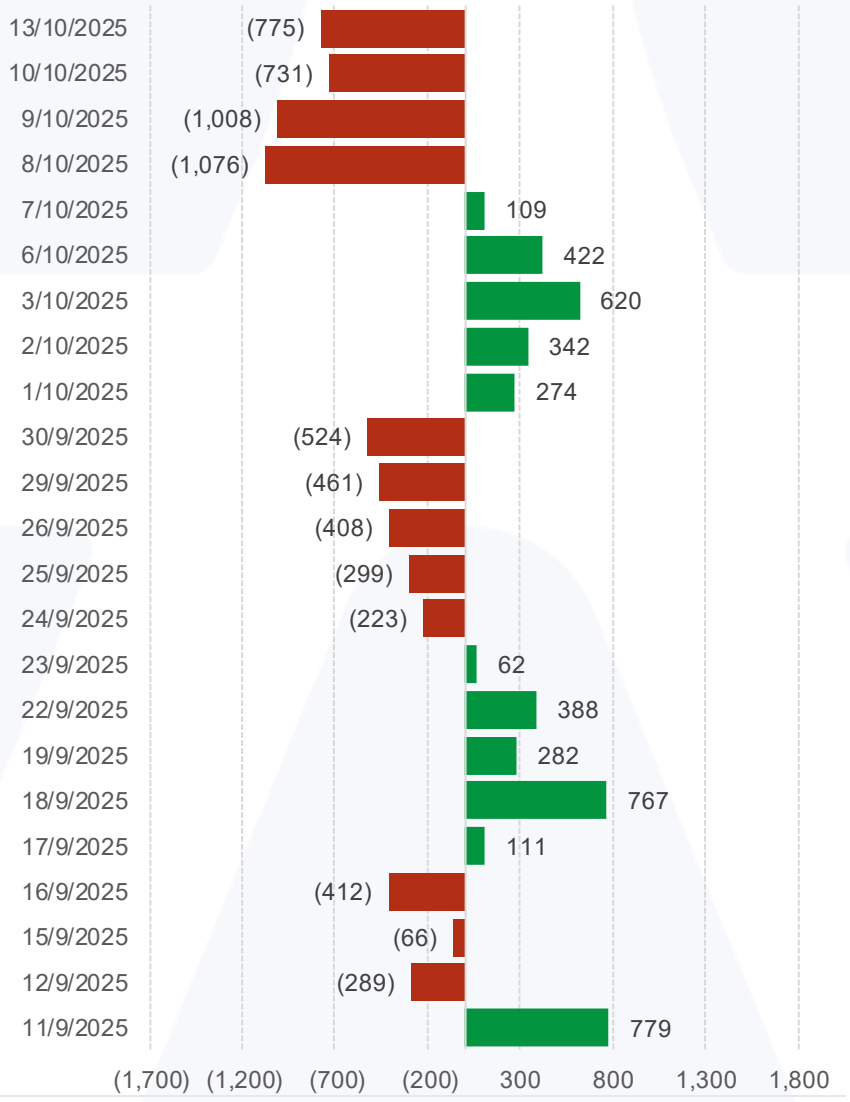
			-				-
			-				-
			-				-
			-				-

最近 1 個月的淨自營交易



單位：十億越南盾

源：YSVN

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