Áp lực bán từ khối ngoại gia tăng

Hoạt động giao dịch trong nước

Trong tuần vừa qua, thanh khoản trên thị trường đảo chiều giảm điểm. Cụ thể, tổng giá trị giao dịch trên toàn thị trường đạt 144 nghìn tỷ đồng, giảm 9.2% so với tuần trước.

Hoạt động giao dịch tự doanh

Nhóm tự doanh đảo chiều bán ròng trong tuần vừa qua. Cụ thể, tổng giá trị rút ròng ghi nhận khoảng 609 tỷ đồng. Trong đó, các mã bị rút vốn nhiều nhất, bao gồm MBB (-358 tỷ đồng), GEE (-280 tỷ đồng), EIB (-192 tỷ đồng), VCB (-85 tỷ đồng) và STB (-71 tỷ đồng). Ở hướng ngược lại, các mã thu hút lượng vốn vào phần lớn tập trung ở MWG (+382 tỷ đồng), VPB (+232 tỷ đồng), TCB (+66 tỷ đồng), PVT (+44 tỷ đồng) và FRT (+23 tỷ đồng).

Hoạt động giao dịch khối ngoại

Trong tuần vừa qua, nhóm khối ngoại tiếp tục rút ròng. Cụ thể, tổng giá trị bán ròng lên đến 2.6 nghìn tỷ đồng, tăng mạnh 178.8% so với tuần trước.

Trong đó, áp lực bán diễn ra chủ yếu ở các nhóm cổ phiếu vốn hóa lớn như FPT (-781 tỷ đồng), VPL (-353 tỷ đồng), VIC (-286 tỷ đồng), ACB (-227 tỷ đồng) và GMD (-211 tỷ đồng).

Ở hướng ngược lại, dòng tiền chủ yếu đến từ TCB (+181 tỷ đồng), MSN (+172 tỷ đồng), VCB (+131 tỷ đồng), SHB (+67 tỷ đồng) và BVH (+61 tỷ đồng).

Bảng 1: Hoạt động giao dịch theo nhóm nhà đầu tư

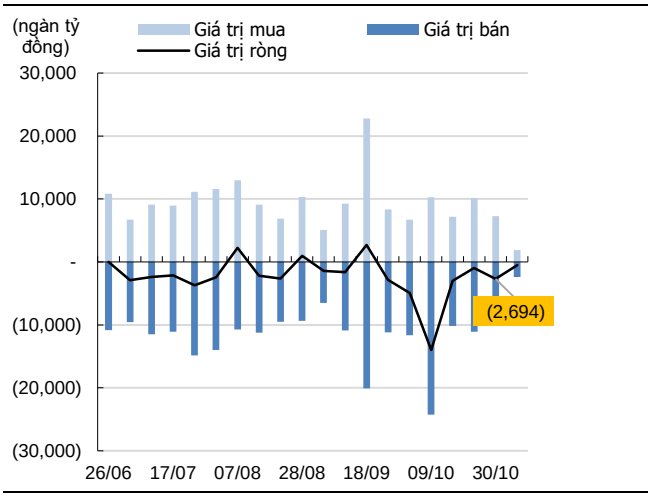
Nhóm nhà đầu tư	Giá trị mua (nghìn tỷ đồng)				Giá trị bán (nghìn tỷ đồng)				Giá trị ròng (nghìn tỷ đồng)			
	1W	1M	3M	1Y	1W	1M	3M	1Y	1W	1M	3M	1Y
ETFs	0.0	0.2	3.1	9.3	0.1	0.7	2.9	16.3	(0.1)	(0.5)	0.2	(7.0)
Nước ngoài	8.0	38.0	88.9	682.1	10.3	62.5	118.3	809.1	(2.3)	(24.5)	(29.4)	(126.9)
Tự doanh	3.5	17.8	48.7	236.1	4.1	17.7	47.9	232.1	(0.6)	0.1	0.8	4.0

Nguồn: FiinproX, KIS Research

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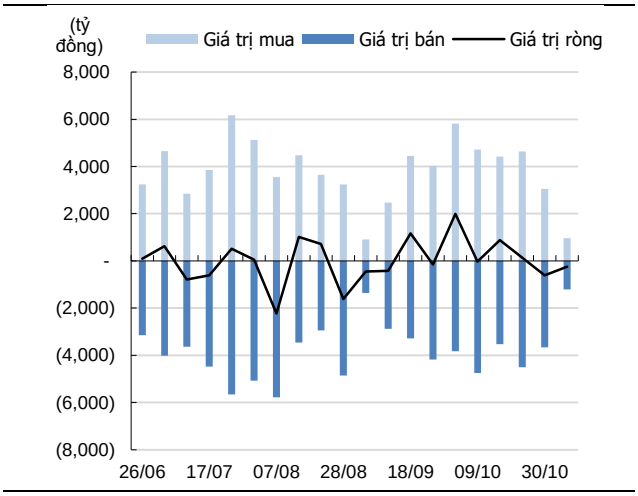
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Hình 1. Giao dịch từ nhà đầu tư nước ngoại



Nguồn: Fiinpro X, KIS Research

Hình 2. Giao dịch tự doanh



Nguồn: Fiinpro X, KIS Research

Bảng 2. Top CP mua ròng của tự doanh (đồng, %tuần, tỷ đồng)

Mã	Sàn	%	Mua	Bán	Ròng
MWG	Dịch vụ Tiêu dùng	(2.0)	573.1	(190.9)	382.2
VPB	Ngân hàng	(4.8)	317.8	(85.4)	232.4
TCB	Ngân hàng	(5.3)	567.1	(500.6)	66.5
PVT	Công nghiệp	(10.3)	113.7	(68.9)	44.8
FRT	Dịch vụ Tiêu dùng	(0.9)	47.9	(24.4)	23.5
DBC	Hàng Tiêu dùng	(6.4)	18.2	(1.9)	16.3
VIB	Ngân hàng	(2.8)	23.6	(14.8)	8.8
HAH	Công nghiệp	(3.2)	7.8	(0.5)	7.2
ACB	Ngân hàng	(1.4)	93.2	(87.0)	6.3
TCX	#N/A	(6.5)	7.1	(4.2)	3.0

Nguồn: FiinproX, KIS Research

Bảng 3. Top CP bán ròng của tự doanh (đồng, %tuần, tỷ đồng)

Mã	Ngành	%	Mua	Bán	Ròng
MBB	Ngân hàng	(2.5)	39.8	(397.8)	(358.1)
GEE	Công nghiệp	(8.6)	0.0	(280.0)	(280.0)
EIB	Ngân hàng	(9.8)	0.3	(193.2)	(192.9)
VCB	Ngân hàng	(0.9)	39.3	(124.9)	(85.6)
STB	Ngân hàng	(3.2)	62.0	(133.6)	(71.6)
MSN	Hàng Tiêu dùng	(5.7)	88.1	(144.3)	(56.2)
GAS	Tiện ích Cộng đồng	(0.4)	28.7	(73.1)	(44.5)
NT2	Tiện ích Cộng đồng	(2.6)	0.3	(37.9)	(37.7)
CTG	Ngân hàng	(2.1)	13.9	(45.0)	(31.0)
GMD	Công nghiệp	(7.7)	4.3	(33.5)	(29.2)

Nguồn: FiinproX, KIS Research

Bảng 4. Top 10 CP mua ròng của khối ngoại (đồng, %tuần, tỷ đồng)

Mã	Ngành	%	Mua	Bán	Ròng
TCB	Ngân hàng	(5.3)	742.9	(561.2)	181.7
MSN	Hàng Tiêu dùng	(5.7)	376.6	(203.9)	172.7
VCB	Ngân hàng	(0.9)	270.6	(138.8)	131.8
SHB	Ngân hàng	(2.3)	100.2	(32.5)	67.7
BVH	Tài chính	0.0	90.5	(28.9)	61.6
HPG	Nguyên vật liệu	0.2	337.2	(276.1)	61.1
VPB	Ngân hàng	(4.8)	339.9	(292.9)	47.0
DCM	Nguyên vật liệu	(6.2)	63.3	(17.1)	46.2
FRT	Dịch vụ Tiêu dùng	(0.9)	119.7	(77.5)	42.2
GAS	Tiện ích Cộng đồng	(0.4)	126.9	(89.1)	37.8

Nguồn: FiinproX, KIS Research

Bảng 5. Top 10 CP bán ròng của khối ngoại (đồng, %tuần, tỷ đồng)

Mã	Ngành	%	Mua	Bán	Ròng
FPT	Công nghệ Thông tin	(7.5)	245.8	(1,027.8)	(782.0)
VPL	#N/A	4.8	26.5	(379.6)	(353.1)
VIC	Tài chính	1.9	438.4	(724.7)	(286.3)
ACB	Ngân hàng	(1.4)	424.3	(651.3)	(227.1)
GMD	Công nghiệp	(7.7)	103.5	(315.3)	(211.8)
SSI	Tài chính	(3.3)	10.2	(160.8)	(150.6)
BID	Ngân hàng	(2.5)	56.3	(181.0)	(124.7)
MSB	Ngân hàng	1.9	66.1	(182.5)	(116.4)
STB	Ngân hàng	(3.2)	97.6	(209.5)	(112.0)
LPB	Ngân hàng	(10.6)	26.9	(137.8)	(110.9)

Nguồn: FiinproX, KIS Research

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