Áp lực bán từ khối ngoại hạ nhiệt

Hoạt động giao dịch trong nước

Trong tuần vừa qua, thanh khoản trên thị trường ghi nhận tăng điểm trở lại. Cụ thể, tổng giá trị giao dịch trên toàn thị trường đạt 165 nghìn tỷ đồng, tăng 17.0% so với tuần trước.

Hoạt động giao dịch tự doanh

Nhóm tự doanh đảo chiều mua ròng trong tuần vừa qua. Cụ thể, tổng giá trị bơm ròng ghi nhận khoảng 503 tỷ đồng. Trong đó, các mã thu hút lượng vốn vào phần lớn tập trung ở VPB (+338 tỷ đồng), HDB (+169 tỷ đồng), TPB (+161 tỷ đồng), MBB (+112 tỷ đồng) và FUEKIV30 (+99 tỷ đồng).

Ở hướng ngược lại, các mã bị rút vốn nhiều nhất, bao gồm MWG (-313 tỷ đồng), FPT (-92 tỷ đồng), BID (-81 tỷ đồng), HPG (-74 tỷ đồng) và FUESSVFL (-60 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 đạt khoảng 870 tỷ đồng, giảm mạnh 67.7% so với tuần trước.

Trong đó, áp lực bán diễn ra chủ yếu ở các nhóm cổ phiếu vốn hóa lớn như MBB (-651 tỷ đồng), VCB (-587 tỷ đồng), ACB (-280 tỷ đồng), GMD (-233 tỷ đồng) và STB (-184 tỷ đồng).

Ở hướng ngược lại, dòng tiền chủ yếu đến từ VIX (+596 tỷ đồng), MSN (+330 tỷ đồng), HPG (+261 tỷ đồng), CTG (+229 tỷ đồng) và VND (+158 tỷ đồng).

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

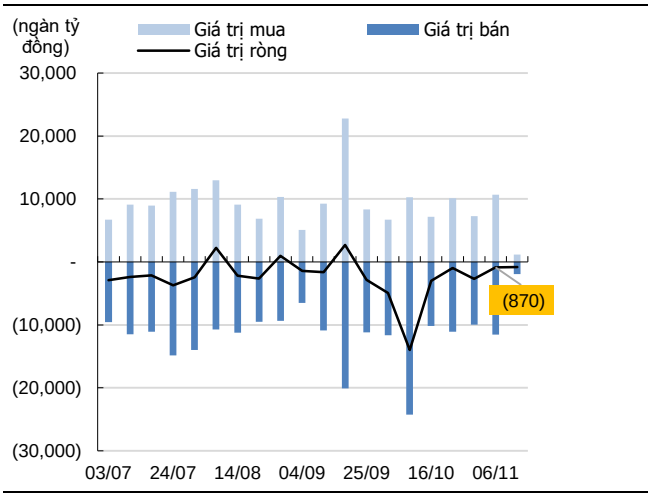
Nhóm nhà đầu tư	Giá trị mua (nghìn tỷ đồng)				Giá trị bán (nghìn tỷ đồng)				Giá trị ròng (nghìn tỷ đồng)			
	1W	1M	3M	1Y	1W	1M	3M	1Y	1W	1M	3M	1Y
ETFs	0.1	0.3	3.3	9.4	0.7	1.1	3.5	16.9	(0.5)	(0.8)	(0.3)	(7.5)
Nước ngoài	10.0	40.0	125.1	676.8	11.1	58.1	159.5	802.7	(1.2)	(18.1)	(34.4)	(126.0)
Tự doanh	4.1	16.2	48.9	234.8	3.6	15.3	46.1	229.3	0.5	0.9	2.8	5.5

Nguồn: FiinproX, KIS Research

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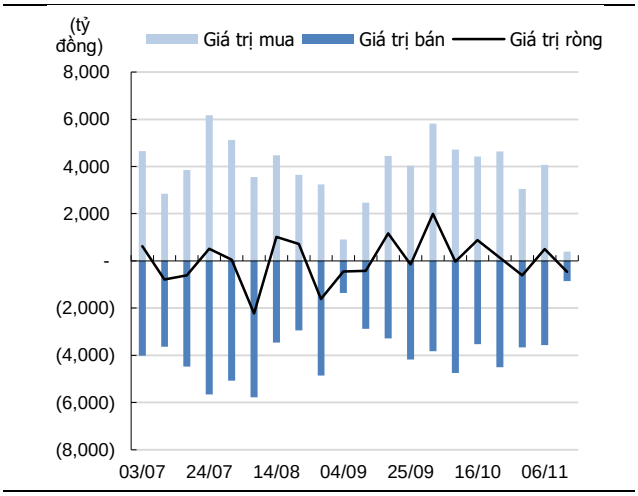
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Hình 1. Giao dịch từ nhà đầu tư nước ngoại



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
VPB	Ngân hàng	(3.9)	458.1	(119.3)	338.7
HDB	Ngân hàng	0.4	246.9	(77.6)	169.4
TPB	Ngân hàng	0.4	166.7	(5.2)	161.5
MBB	Ngân hàng	(0.3)	184.9	(72.6)	112.3
FUEKIV30	Tài chính	(1.6)	100.1	(0.9)	99.2
MSN	Hàng Tiêu dùng	4.3	174.6	(89.6)	85.0
POW	Tiện ích Cộng đồng	1.2	74.7	0.0	74.7
TCB	Ngân hàng	0.2	382.6	(335.1)	47.4
CTG	Ngân hàng	5.1	78.2	(30.9)	47.3
VCB	Ngân hàng	(4.8)	160.6	(125.1)	35.5

Nguồn: FiinproX, KIS Research

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

Mã	Ngành	%	Mua	Bán	Ròng
MWG	Dịch vụ Tiêu dùng	(0.4)	342.8	(656.2)	(313.3)
FPT	Công nghệ Thông tin	(3.6)	198.7	(290.9)	(92.2)
BID	Ngân hàng	(4.3)	9.9	(91.0)	(81.1)
HPG	Nguyên vật liệu	1.0	328.8	(403.4)	(74.6)
FUESSVFL	Tài chính	4.6	2.3	(63.0)	(60.8)
FUESSV50	Tài chính	(6.0)	0.0	(59.2)	(59.2)
E1VFVN30	Tài chính	(0.4)	27.9	(63.5)	(35.6)
HHV	Công nghiệp	2.8	0.0	(27.4)	(27.3)
STB	Ngân hàng	5.6	98.7	(125.9)	(27.2)
VIC	Tài chính	(2.7)	95.6	(119.6)	(24.0)

Nguồn: FiinproX, KIS Research

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

Mã	Ngành	%	Mua	Bán	Ròng
VIX	Tài chính	11.3	799.1	(202.9)	596.2
MSN	Hàng Tiêu dùng	4.3	699.2	(369.0)	330.2
HPG	Nguyên vật liệu	1.0	516.8	(255.7)	261.1
CTG	Ngân hàng	5.1	506.9	(277.5)	229.4
VND	Tài chính	11.6	239.5	(81.0)	158.5
SHB	Ngân hàng	0.9	249.2	(103.4)	145.8
VIB	Ngân hàng	1.4	118.0	(13.4)	104.6
VNM	Hàng Tiêu dùng	1.6	284.2	(198.5)	85.8
KDH	Tài chính	8.6	250.2	(168.9)	81.3
BVH	Tài chính	(8.0)	109.8	(35.6)	74.2

Nguồn: FiinproX, KIS Research

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

Mã	Ngành	%	Mua	Bán	Ròng
MBB	Ngân hàng	(0.3)	221.9	(873.0)	(651.0)
VCB	Ngân hàng	(4.8)	150.6	(738.2)	(587.6)
ACB	Ngân hàng	(3.1)	266.4	(546.5)	(280.1)
GMD	Công nghiệp	0.2	94.3	(328.1)	(233.8)
STB	Ngân hàng	5.6	161.6	(346.6)	(184.9)
HDB	Ngân hàng	0.4	173.4	(328.9)	(155.5)
VPL	#N/A	3.1	40.7	(192.0)	(151.3)
BID	Ngân hàng	(4.3)	26.3	(167.6)	(141.3)
FPT	Công nghệ Thông tin	(3.6)	535.8	(672.5)	(136.6)
BSR	Dầu khí	(4.9)	85.2	(215.8)	(130.6)

Nguồn: FiinproX, KIS Research

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