

Thanh khoản tiếp tục cải thiện

Hoạt động giao dịch trong nước

Trong tuần vừa qua, thanh khoản trên thị trường đánh dấu chuỗi ba tuần tăng liên tiếp. Cụ thể, tổng giá trị giao dịch trên toàn thị trường đạt 237 nghìn tỷ đồng, tăng 3.8% so với tuần trước.

Xét theo từng nhóm nhà đầu tư, hoạt động giao dịch ở nhóm cá nhân trong nước và nhóm tổ chức trong nước đều đồng thuận tăng, với mức tăng lần lượt là 2.4% và 1.2% so với tuần liền trước.

Hoạt động giao dịch tự doanh

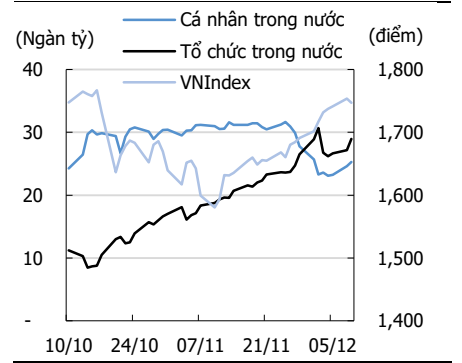
Nhóm tự doanh tiếp tục xu hướng mua ròng nhưng đã hạ nhiệt đáng kể. Cụ thể, tổng giá trị mua ròng lên đạt khoảng 58 tỷ đồng, giảm 93.7% so với tuần trước đó. Đáng chú ý, các mã bị rút vốn nhiều nhất, bao gồm MWG (-434 tỷ đồng), DBD (-151 tỷ đồng), HDB (-78 tỷ đồng), FRT (-72 tỷ đồng) và MBB (-70 tỷ đồng). Ở hướng ngược lại, các mã thu hút lượng vốn vào phần lớn tập trung ở SSI (+212 tỷ đồng), VHM (+172 tỷ đồng), VIX (+168 tỷ đồng), STB (+118 tỷ đồng) và FPT (+108 tỷ đồng).

Hoạt động giao dịch khối ngoại

Sau chuỗi 19 tuần bán ròng liên tiếp, khối ngoại đã đảo chiều mua ròng trở lại, với tổng giá trị bơm ròng trong tuần lên đến 4.4 nghìn tỷ đồng. Trong đó, dòng tiền chủ yếu đến từ VPL (+3.3 nghìn tỷ đồng), MBB (+1.5 nghìn tỷ đồng), MWG (+331 tỷ đồng), VJC (+323 tỷ đồng) và VNM (+306 tỷ đồng).

Ở hướng ngược lại, áp lực bán diễn ra chủ yếu ở các nhóm cổ phiếu vốn hóa lớn như VHM (-388 tỷ đồng), VCB (-334 tỷ đồng), ACB (-327 tỷ đồng), VIX (-209 tỷ đồng) và SSI (-191 tỷ đồng).

Hình 1. Giá trị tích lũy ròng



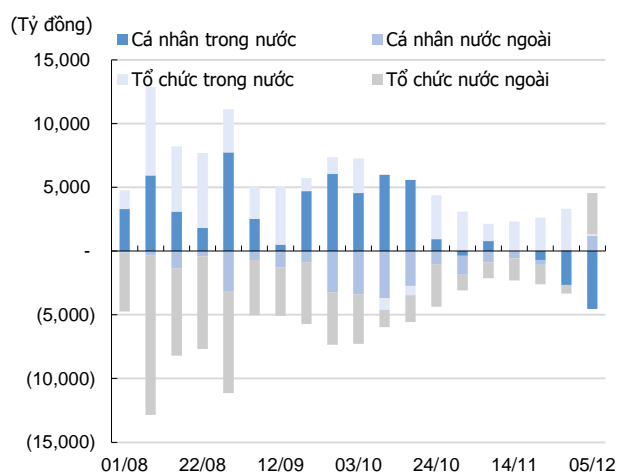
Nguồn: Fiinpro X, KIS Research
Lưu ý: Giá trị tích lũy tính từ tháng 1/23

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

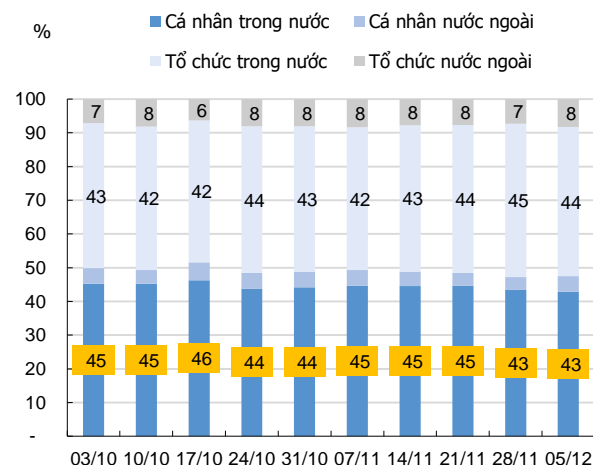
Nhóm nhà đầu tư	Giá trị mua (nghìn tỷ đồng)				Giá trị bán (nghìn tỷ đồng)				Giá trị ròng (nghìn tỷ đồng)			
	1W	1M	3M	YTD	1W	1M	3M	YTD	1W	1M	3M	YTD
Cá nhân nước ngoài	43.5	214.1	827.4	1,848.6	38.2	202.2	799.8	1,801.5	5.3	11.9	27.7	47.1
Cá nhân trong nước	36.5	208.7	867.3	1,866.1	42.5	213.4	843.3	1,823.5	(6.0)	(4.7)	24.1	42.6
Tổ chức nước ngoài	7.2	34.2	126.3	286.7	6.8	39.8	158.2	352.8	0.4	(5.6)	(31.9)	(66.1)
Tổ chức trong nước	3.8	19.3	72.6	131.9	3.6	20.9	92.4	155.4	0.2	(1.6)	(19.8)	(23.6)
Tự doanh	3.2	18.5	67.7	137.7	2.7	17.0	66.3	132.6	0.5	1.5	1.3	5.2

Nguồn: FiinproX, KIS Research

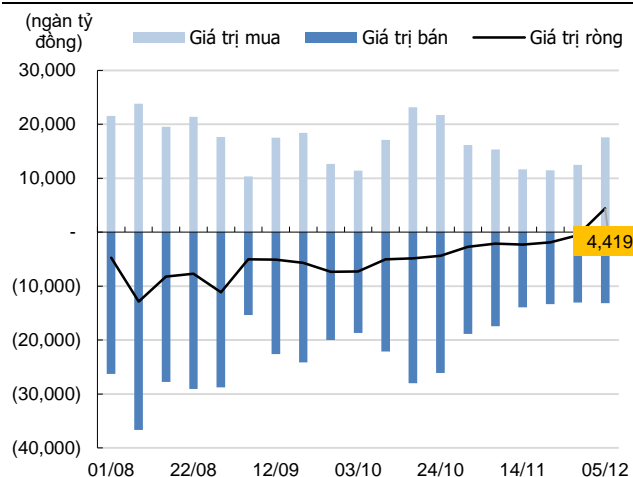
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Hình 2. Diễn biến giao dịch theo nhóm nhà đầu tư

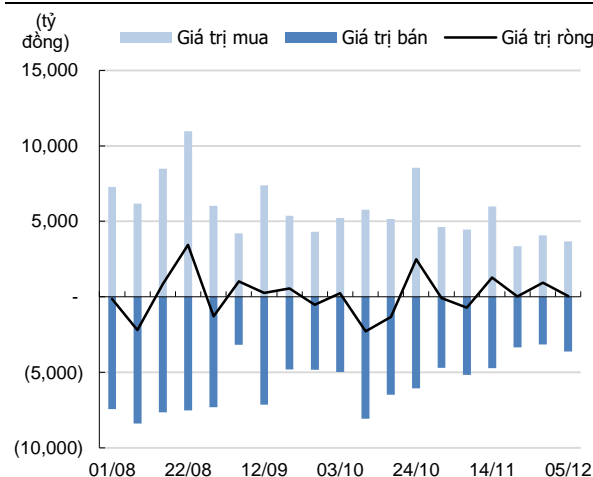
Nguồn: Fiinpro X, KIS Research

Hình 3. Tỷ trọng giá trị giao dịch theo nhóm nhà đầu tư

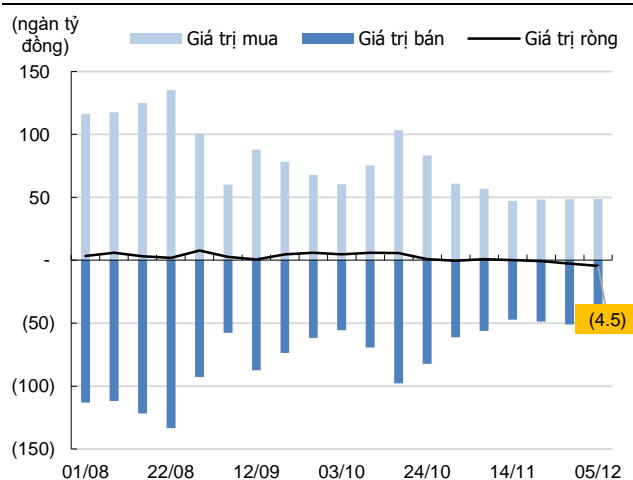
Nguồn: Fiinpro X, KIS Research

Hình 4. Giao dịch từ nhà đầu tư nước ngoài

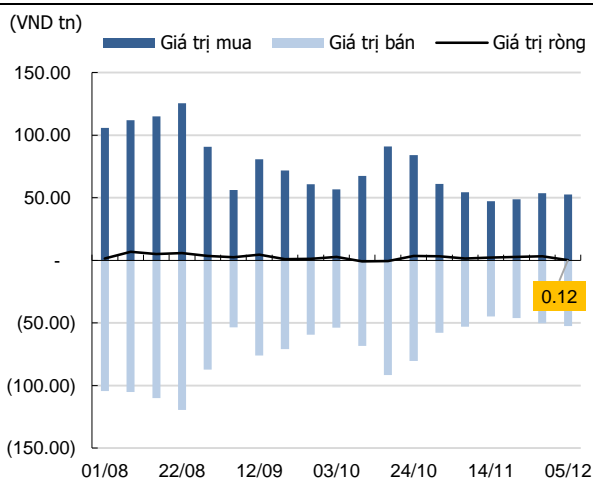
Nguồn: Fiinpro X, KIS Research

Hình 5. Giao dịch tự doanh

Nguồn: Fiinpro X, KIS Research

Hình 6. Giao dịch từ nhà đầu tư cá nhân trong nước

Nguồn: Fiinpro X, KIS Research

Hình 7. Giao dịch từ nhà đầu tư tổ chức trong nước

Nguồn Bloomberg, Fiinpro X, KIS Research

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