

STOCK MARKET

VN-Index traded in the range of 1,265 – 1,270 throughout the day before surging towards the end of the session and closing at 1,276.99 points, up nearly 9 points compared to the previous day. Market breadth tilted positive with 16 out of 18 sectors gaining, led by Construction & Materials and Chemicals. However, foreign investors were net sellers today, offloading over 2.5 trillion VND on the HSX exchange. VN-Index continues to consolidate around the 1,270 level with low liquidity.

FUTURES CONTRACTS

The futures contracts increased in line with the movements of the VN30.

COVERED WARRANTS

During the trading session on 24/09/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **+8.51** points, closing at **1276.99** points. HNX-Index **+0.94** points, closing at **234.32** points.
- Pulling the index up: **BID (+0.77)**, **VHM (+0.64)**, **GVR (+0.59)**, **MBB (+0.59)**, **STB (+0.50)**.
- Pulling the index down: **VNM (-0.10)**, **BMP (-0.07)**, **VCF (-0.06)**, **ITA (-0.04)**, **BWE (-0.03)**.
- The matched trade value of VN-Index reached VND **11,558** billion, increased **10.74%** compared to the previous session. The total transaction value reached VND 17,890 billion.
- The trading range is 10.31 points. The market had **256** gainers, 95 remaining unchanged, **119** losers.
- Foreign investors' net selling value: VND **-2478.84** billion on HOSE, including **VIB (VND -2715.80 billion)**, **VND (VND -46.63 billion)**, **VPB (VND -36.11 billion)**, **HDB (VND -35.26 billion)**, **TPB (VND -26.39 billion)**. Foreign investors were net buyers on HNX with the value of VND **7.40** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.24%**. Positive stocks: **SSI (+1.33%)**, **GMD (+0.77%)**, **DCM (+0.53%)**.
- BSC50 **-0.26%**. Positive stocks: **BMP (+4.32%)**, **QNS (+1.88%)**, **C4G (+1.12%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.24%	-0.26%	-0.28%	-0.37%
1 week	3.21%	3.20%	2.65%	3.48%
1 months	-1.99%	-1.07%	-1.27%	-0.98%
3 months	-0.43%	-3.50%	0.05%	0.67%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,276.99	234.32	93.81
% 1D	0.67%	0.40%	0.17%
TV (bil VND)	11,558	804	472
%1D	10.74%	4.60%	0.86%
Foreign (bil VND)	-2478.84	7.40	-1.34

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MWG	93.98	VIB	-2715.80
MSB	78.43	VND	-46.63
STB	68.36	VPB	-36.11
NAB	51.90	HDB	-35.26
HCM	43.26	TPB	-26.39

Overview of global stock markets

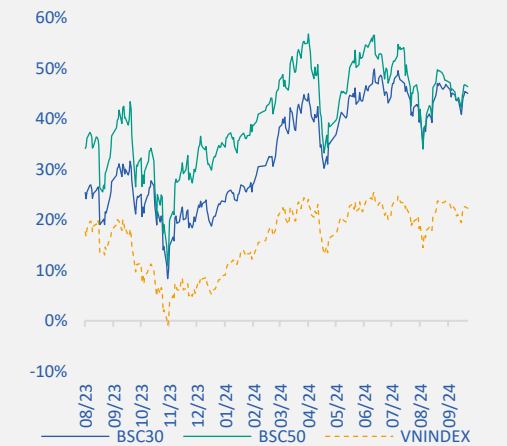
		%D	%W
SPX	5,719	0.28%	1.52%
FTSE100	8,285	0.31%	-0.29%
Eurostoxx	4,943	1.24%	1.65%
Shanghai	2,863	4.15%	5.88%
Nikkei	38,007	0.71%	3.90%

Source: Bloomberg

	Close	%
Commodities		
Brent	74	0.03%
Gold	2,622	-1.16%
Exchange rate		
USD/VND	24,790	-0.04%
EUR/VND	28,109	0.09%
JPY/VND	174	-0.57%
Interst rates		
10Y-Gov bond rate	2.68%	-0.01%
1M-interbank rate	3.72%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

Contents

Market outlook	Page 1
Market statistics	Page 2
BSC30	Page 3
BSC50	Page 4
Disclaimer	Page 5

MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
BID	49.25	1.13%	0.77	5.70
VHM	44.25	1.37%	0.64	4.35
GVR	36.15	1.69%	0.59	4.00
MBB	25.25	1.81%	0.59	5.31
STB	31.85	3.41%	0.50	1.89

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	54.00	3.25%	0.25	0.20
IDC	59.30	1.54%	0.22	0.33
MBS	29.50	2.08%	0.19	0.44
VIF	17.80	3.49%	0.16	0.35
SHS	15.30	1.32%	0.12	0.81

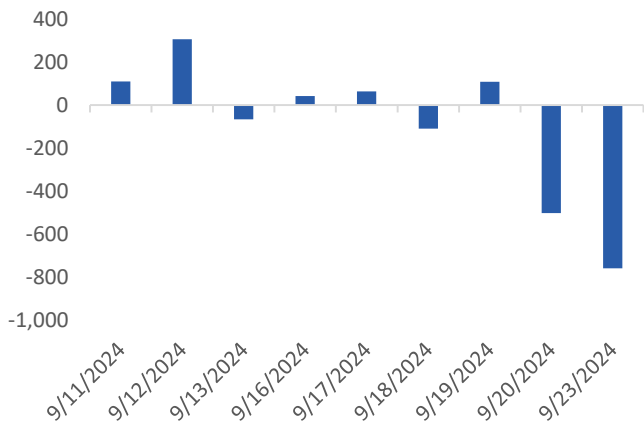
Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
MSH	47.50	6.98%	0.06	0.50
HHV	10.75	6.97%	0.08	9.46
BMC	21.60	6.93%	0.00	0.44
VRC	8.81	6.92%	0.01	0.15
STG	43.95	6.80%	0.07	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BPC	14.40	9.92%	0.01	0.03
DTC	8.90	9.88%	0.01	0.00
HTC	5.60	9.80%	0.02	0.06
PIA	23.90	9.63%	0.14	0.00
PCT	34.00	8.97%	0.05	0.00

Figure 1
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VNM	70.30	-0.28%	-0.10	2.09
BMP	124.50	-2.66%	-0.07	0.08
VCF	210.50	-4.75%	-0.06	0.03
ITA	2.40	-6.98%	-0.04	0.94
BWE	47.30	-1.25%	-0.03	0.22

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
DHT	71.00	-1.11%	-0.05	0.08
GKM	19.90	-9.95%	-0.04	0.03
DL1	7.20	-6.49%	-0.04	0.11
THD	35.70	-0.28%	-0.03	0.38
PMC	85.50	-4.68%	-0.03	0.01

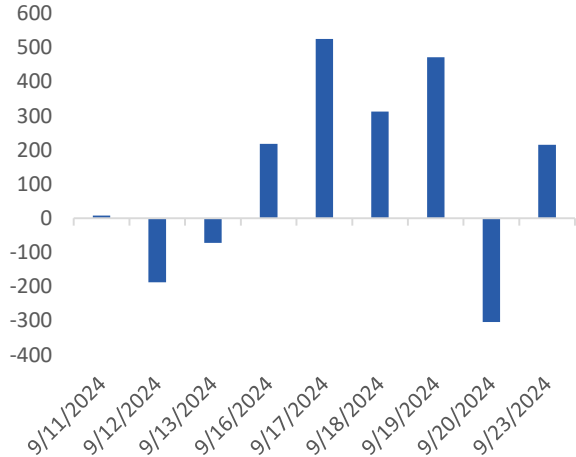
Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HVN	10.00	-6.98%	-0.01	1.92
HAG	10.75	-6.93%	-0.19	35.41
HHS	8.61	-6.92%	-0.05	3.41
NHA	23.55	-6.92%	-0.02	1.42
DXV	4.59	-6.90%	0.00	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
DAE	12.80	-9.86%	-0.01	0.00
HMR	21.10	-9.83%	-0.04	0.20
CMS	18.40	-9.80%	-0.17	0.61
TXM	6.50	-9.72%	-0.02	0.04
MCO	12.20	-9.63%	-0.02	0.05

Figure 2
Foreign transactions



Source: FiinProX, BSC Research

BSC30 PORTFOLIO

Stocks	Sector	Close (1,000 VND)	% Day	Beta	MC (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	TP (VND)	Foreign ownershi- p	Link
VCB	Bank	91.2	0.30%	0.7	20,729	1.9	5,962	15.3	105,000	23.3%	Link
BID	Bank	49.2	1.10%	1.1	11,417	2.8	4,006	12.3	54,578	17.2%	Link
VPB	Bank	19.2	1.10%	0.9	6,195	29.4	1,461	13.1	23,685	26.1%	Link
TCB	Bank	23.6	0.90%	1.2	6,747	10.6	3,047	7.7	-	20.9%	Link
MBB	Bank	25.2	1.80%	1.0	5,449	18.1	4,018	6.3	24,400	23.2%	Link
STB	Bank	31.8	3.40%	1.2	2,442	32.2	4,340	7.3	31,200	22.9%	Link
CTG	Bank	36.0	0.40%	1.4	7,873	8.1	3,782	9.5	19,100	26.3%	Link
ACB	Bank	25.8	0.60%	0.8	4,686	13.4	3,676	7.0	42,500	30.0%	Link
SSI	Broker	26.6	0.00%	1.3	2,122	9.3	1,882	14.1	45,900	41.3%	Link
IDC	IP	59.3	1.50%	1.1	796	3.8	5,573	10.6	-	24.5%	Link
HPG	Material	25.8	0.60%	1.2	6,724	11.2	1,746	14.8	23,300	23.7%	Link
HSG	Material	20.2	0.20%	1.6	505	4.5	1,844	10.9	79,900	17.3%	Link
VHM	RE	44.2	1.40%	0.9	7,836	12.5	5,350	8.3	38,900	14.2%	Link
KDH	RE	38.5	1.60%	1.2	1,424	5.9	765	50.3	44,100	38.1%	Link
NLG	RE	41.9	0.20%	1.2	656	1.4	1,102	38.0	46,100	48.8%	Link
DGC	Chemicals	115.5	0.40%	1.5	1,784	5.1	7,898	14.6	85,000	18.1%	Link
DCM	Fertilizer	38.2	0.40%	1.2	824	3.2	2,828	13.5	41,000	7.4%	Link
GAS	O&G	73.7	1.00%	0.6	7,021	2.6	4,760	15.5	36,000	1.9%	Link
PVS	O&G	41.6	0.70%	1.0	809	4.9	1,932	21.5	110,500	22.1%	Link
PVD	O&G	27.6	2.60%	1.3	623	7.6	1,155	23.9	45,000	15.6%	Link
POW	Utilities	12.6	0.80%	0.7	1,200	1.2	463	27.2	38,500	4.1%	Link
VHC	Fishery	72.0	0.60%	1.3	657	0.4	3,234	22.3	29,000	29.8%	Link
GMD	Logistics	79.0	0.00%	0.8	998	0.7	4,054	19.5	14,500	48.6%	Link
VNM	Retail	70.3	-3.60%	0.6	5,975	5.9	4,633	15.2	81,700	51.5%	Link
MSN	Retail	74.8	0.50%	1.2	4,602	9.3	466	160.4	27,700	28.6%	Link
MWG	Retail	68.1	1.20%	1.3	4,049	18.4	1,507	45.2	63,800	46.9%	Link
PNJ	Retail	99.4	0.30%	1.0	1,352	3.4	6,132	16.2	83,500	49.0%	Link
DGW	Retail	47.9	0.20%	1.7	423	1.2	2,236	21.4	90,900	25.1%	Link
FPT	Tech	134.5	0.40%	1.1	7,988	11.0	4,890	27.5	57,000	45.2%	Link
CTR	Tech	133.5	3.40%	1.3	621	2.8	4,590	29.1	108,000	9.4%	Link

The BSC30 portfolio includes 30 companies with the largest market capitalization with the largest liquidity on all three Ho Chi Minh Stock Exchange (HOSE), Hanoi Stock Exchange (HNX), and Ho Chi Minh Stock Exchange Decentralized (Upcom). The companies in the BSC30 represent many important economic sectors, including banking, securities, consumer goods, retail, technology, manufacturing, logistics, electricity, and real estate. The stocks in BSC 30 are evaluated and selected by BSC experts based on the criteria of stable business operation, strong finance, effective management, and good competition in the market. Investing in stocks in the BSC30 portfolio is considered a reliable choice for investors who want to invest in Vietnam's stock market. The BSC30 portfolio will be published quarterly by BSC.

BSC50 PORTFOLIO

Stocks	Sectors	Close (1,000 VND)	% Day	Beta	MC (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	P/B	Foreign ownershi- p	ROE (%)
HDB	Bank	27.0	0.00%	0.9	3,198	6.9	4,137	6.5	1.6	19.5%	27.8%
VIB	Bank	19.1	3.20%	1.1	2,314	14.8	3,048	6.3	1.3	20.5%	21.4%
TPB	Bank	15.4	1.00%	1.2	1,655	3.3	2,154	7.1	1.0	28.4%	14.2%
MSB	Bank	11.6	1.30%	1.1	1,226	2.1	2,366	4.9	0.7	29.5%	14.9%
EIB	Bank	17.3	0.60%	0.8	1,310	2.1	1,273	13.6	1.3	2.8%	9.9%
HCM	Broker	30.7	0.80%	1.6	879	8.1	1,397	22.0	2.0	45.3%	10.6%
VCI	Broker	34.5	0.90%	1.7	806	8.1	1,763	19.6	1.7	20.1%	9.6%
VND	Broker	14.8	-0.30%	1.5	916	6.2	1,591	9.3	1.3	13.5%	15.0%
BSI	Broker	49.2	0.70%	1.6	446	0.8	2,165	22.7	2.0	40.0%	9.3%
SHS	Broker	15.3	1.30%	1.7	506	3.4	1,338	11.4	1.1	8.9%	10.5%
CTD	Const	64.1	4.40%	1.3	260	3.4	2,996	21.4	0.7	47.1%	3.6%
HHV	Const	12.2	0.40%	1.6	214	1.4	869	14.0	0.6	7.7%	4.4%
LCG	Const	10.8	0.50%	1.6	85	0.4	766	14.2	0.8	2.1%	5.7%
SZC	IP	37.7	3.30%	1.1	276	3.8	1,549	24.3	2.3	3.2%	12.1%
SIP	IP	73.0	0.40%	1.4	625	0.4	5,931	12.3	3.4	2.0%	29.0%
PHR	IP	60.2	2.00%	1.0	332	0.9	3,028	19.9	2.1	18.5%	12.1%
DIG	RE	22.8	0.70%	1.7	564	6.3	151	150.7	1.8	4.7%	1.1%
CEO	RE	15.6	0.60%	2.0	343	1.6	318	49.0	1.3	4.8%	2.1%
KBC	IP	28.2	6.80%	1.5	880	13.7	300	94.0	1.2	20.5%	1.7%
VGC	IP	44.2	2.20%	1.2	806	3.1	1,776	24.9	2.4	4.7%	8.2%
GVR	IP	36.2	1.70%	1.5	5,880	5.3	693	52.1	2.8	0.5%	6.5%
NKG	Material	21.1	-0.70%	1.6	226	3.4	1,580	13.4	1.0	13.1%	7.4%
BMP	Material	124.5	-2.70%	1.2	414	1.0	11,420	10.9	3.8	82.6%	34.6%
IJC	RE	14.1	0.40%	1.4	217	1.0	683	20.6	1.0	4.6%	6.0%
DXG	RE	15.8	1.60%	1.6	463	4.9	249	63.5	1.1	15.4%	1.9%
VRE	RE	19.0	0.30%	1.3	1,760	4.6	1,975	9.6	1.1	22.2%	11.9%
PDR	RE	22.6	1.60%	1.7	801	7.9	557	40.5	1.8	6.4%	5.0%
DIG	RE	22.8	0.70%	1.7	564	6.3	151	150.7	1.8	4.7%	1.1%
HUT	Const	16.6	0.00%	1.0	602	0.5	64	261.6	1.7	1.5%	1.7%
C4G	Const	9.0	0.00%	1.2	-	0.1	503	17.9	0.8	0.0%	4.8%
CSV	Chemicals	39.4	0.10%	2.0	177	1.9	4,748	8.3	1.2	3.8%	15.2%
DHC	Chemicals	37.4	-0.10%	1.2	123	0.1	3,067	12.2	1.6	39.2%	13.3%
DRC	Tyre	31.4	-1.10%	0.8	152	1.0	2,509	12.5	2.0	11.7%	16.5%
PC1	Utlilities	28.8	0.00%	1.3	364	1.6	1,203	23.9	1.7	13.8%	6.1%
HDG	Utlilities	28.8	1.80%	1.3	394	3.2	1,958	14.7	1.6	15.7%	11.8%
GEX	Utlilities	21.1	1.70%	1.5	738	4.9	1,245	16.9	1.4	8.3%	7.0%
QTP	Utlilities	14.4	0.00%	0.6	-	0.1	1,357	10.6	1.2	1.2%	11.2%
PLX	O&G	45.2	-0.10%	0.9	2,336	2.2	2,879	15.7	2.3	18.2%	13.8%
BSR	O&G	24.0	0.40%	1.0	-	4.7	2,408	10.0	1.3	0.7%	13.4%
PLC	O&G	24.9	0.40%	1.5	82	0.0	734	33.9	1.6	0.5%	4.7%
ANV	Fishery	31.9	-0.20%	1.6	173	0.6	114	280.6	1.5	1.0%	1.2%
PTB	Material	62.0	0.00%	0.8	169	0.2	4,899	12.7	1.5	24.9%	11.9%
VSC	Logistics	17.3	0.60%	1.3	202	1.3	713	24.3	1.1	3.1%	7.3%
HAH	Logistics	40.4	0.60%	1.2	200	2.2	2,800	14.4	1.8	7.7%	10.6%
VTP	Logistics	80.0	0.60%	1.5	396	7.1	2,893	27.7	6.1	6.9%	22.8%
DBC	Retail	29.8	0.20%	1.6	405	4.3	979	30.4	1.5	12.1%	5.0%
FRT	Retail	178.9	0.00%	0.7	991	1.8	(414)	-431.7	14.6	36.1%	11.8%
QNS	Retail	48.7	-0.40%	0.6	-	0.5	6,678	7.3	2.0	13.8%	28.7%
TNG	Textile	26.0	0.00%	1.3	130	1.3	2,254	11.5	1.6	19.5%	14.7%
PVT	Logistics	28.0	1.10%	1.1	405	0.8	2,805	10.0	1.4	13.2%	14.2%
DPM	Fertilizer	35.6	0.00%	1.2	567	2.1	1,703	20.9	1.2	8.8%	5.5%
REE	Utlilities	66.6	-0.10%	1.1	1,276	1.2	3,804	17.5	1.8	49.0%	10.0%

The BSC50 portfolio includes 50 companies selected based on liquidity criteria among the 100 best liquid stocks on all three exchanges. These stocks have a higher beta than BSC30, but are still among the top companies in Banking, Securities, Insurance, Construction, Real Estate, Materials, Logisitic, O&G, F&B, Retail, Industrial Production, and Utilities (Electricity, Water), etc. BSC 50 is evaluated quarterly by BSC experts to ensure that the stocks still meet the given criteria. The BSC50 listing is suitable for bull market periods and has potential for investors looking for short-term trading opportunities.

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