

STOCK MARKET

After fluctuating around the 1,290 level, the VN-Index surged to 1,300 today before retreating to close at 1,291.49 points, up more than 4 points compared to the previous session. The market breadth was positive with 12 out of 18 sectors advancing, led by the Communication sector. In terms of foreign trading, today the foreign investors were net buyers on both the HSX and HNX exchanges. VN-Index was not yet able to break through the 1,300 resistance level today. In the upcoming sessions, the index may continue to accumulate around this previous peak.

FUTURES CONTRACTS

Futures contracts increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 26/09/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **+4.01** points, closing at **1291.49** points. HNX-Index **+0.08** points, closing at **235.92** points.
- Pulling the index up: **HDB (+0.77)**, **TPB (+0.60)**, **VNM (+0.57)**, **CTG (+0.53)**, **TCB (+0.52)**.
- Pulling the index down: **VCB (-0.40)**, **HVN (-0.24)**, **HPG (-0.23)**, **ACB (-0.21)**, **FPT (-0.18)**.
- The matched trade value of VN-Index reached VND **20,077 billion**, decreased **-2.32%** compared to the previous session. The total transaction value reached VND 21,754 billion.
- The trading range is 9.56 points. The market had **209** gainers, 87 remaining unchanged, **177** losers.
- Foreign investors' net buying value: VND **957.67 billion** on HOSE, including **TPB (VND 126.57 billion)**, **VNM (VND 115.05 billion)**, **VHM (VND 105.92 billion)**, **HDB (VND 105.11 billion)**, **VCI (VND 85.50 billion)**. Foreign investors were net buyers on HNX with the value of VND 22.33 billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+0.98%**. Positive stocks: **POW (+3.57%)**, **SSI (+3.20%)**, **HSG (+2.73%)**.
- BSC50 **+0.92%**. Positive stocks: **CEO (+3.21%)**, **VCI (+3.19%)**, **MSB (+3.02%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.98%	0.92%	0.82%	0.99%
1 week	1.52%	1.56%	0.96%	1.52%
1 months	0.13%	0.98%	0.68%	1.03%
3 months	-2.05%	-4.72%	-1.61%	-0.60%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,291.49	235.92	93.50
% 1D	0.31%	0.03%	0.00%
TV (bil VND)	20,077	1,088	911
%1D	-2.32%	-21.47%	53.90%
Foreign (bil VND)	957.67	22.33	-6.04

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
TPB	126.57	HPG	-68.47
VNM	115.05	VPB	-47.11
VHM	105.92	POW	-15.57
HDB	105.11	SCS	-15.02
VCI	85.50	MSB	-14.97

Overview of global stock markets

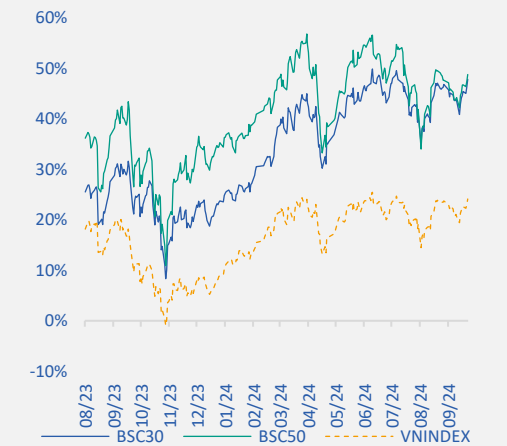
		%D	%W
SPX	5,722	-0.19%	1.85%
FTSE100	8,307	0.46%	-0.27%
Eurostoxx	5,007	1.83%	1.63%
Shanghai	3,000	3.58%	9.65%
Nikkei	38,826	2.41%	6.84%

Source: Bloomberg

	Close	%
Commodities		
Brent	73	-0.10%
Gold	2,661	-0.84%
Exchange rate		
USD/VND	24,800	0.20%
EUR/VND	28,204	-0.20%
JPY/VND	173	-0.57%
Interest rates		
10Y-Gov bond rate	2.68%	-0.01%
1M-interbank rate	4.14%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

Contents

Market outlook	Page 1
Market statistics	Page 2
Futures market	Page 3
BSC30	Page 4
BSC50	Page 5
Disclaimer	Page 6

MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
HDB	28.30	3.85%	0.77	2.91
TPB	16.65	6.73%	0.60	2.20
VNM	70.70	1.58%	0.57	2.09
CTG	36.40	1.11%	0.53	5.37
TCB	24.10	1.26%	0.52	7.05

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
DTK	13.30	6.40%	0.42	0.68
DNP	24.50	8.89%	0.22	0.14
PTI	32.50	3.50%	0.07	0.08
MBS	31.40	0.64%	0.06	0.44
SHS	15.70	0.64%	0.06	0.81

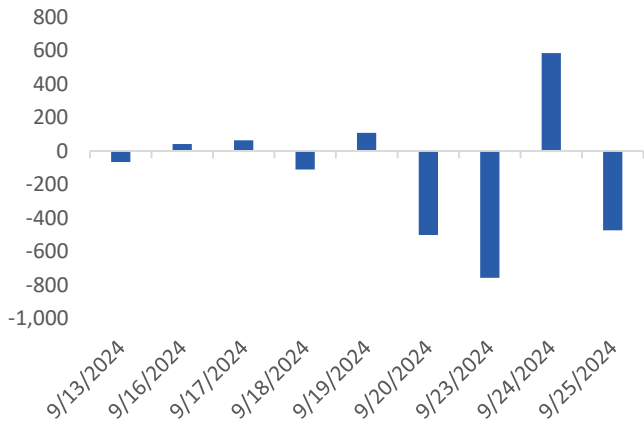
Top 5 gainers on the HSX

	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)
VCB	92.50	-0.32%	-0.40	5.59
HVN	21.25	-2.07%	-0.24	2.21
HPG	26.05	-0.57%	-0.23	6.40
ACB	26.00	-0.76%	-0.21	4.47
FPT	134.30	-0.37%	-0.18	1.46

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
KSV	54.40	-1.98%	-0.16	0.20
PVS	41.20	-0.96%	-0.14	0.48
PGS	32.00	-6.71%	-0.08	0.05
NTP	64.90	-0.92%	-0.06	0.13
KSF	40.50	-0.49%	-0.04	0.30

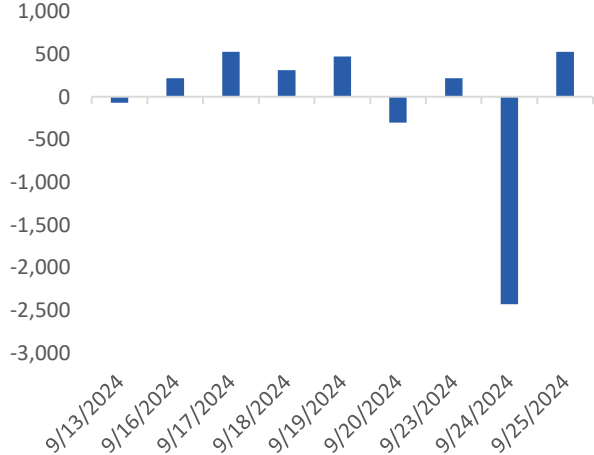
Top 5 losers on the HSX

	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	92.5	-0.30%	0.7	21,024	6.8	5,962	15.5	105,000	23.3%	Link
BID	Bank	50.0	0.00%	1.1	11,591	8.6	4,006	12.5	54,578	17.2%	Link
VPB	Bank	19.6	0.80%	0.9	6,324	43.9	1,461	13.4	23,685	26.1%	Link
TCB	Bank	24.1	1.30%	1.2	6,905	25.7	3,047	7.9	-	20.9%	Link
MBB	Bank	25.7	-0.20%	1.0	5,546	27.7	4,018	6.4	24,400	23.2%	Link
STB	Bank	32.8	0.20%	1.2	2,511	34.4	4,340	7.5	31,200	22.9%	Link
CTG	Bank	36.4	1.10%	1.4	7,949	33.8	3,782	9.6	19,100	26.3%	Link
ACB	Bank	26.0	-0.80%	0.8	4,723	19.2	3,676	7.1	42,500	30.0%	Link
SSI	Broker	27.5	0.20%	1.3	2,194	16.7	1,882	14.6	45,900	41.3%	Link
IDC	IP	58.9	0.00%	1.1	790	2.1	5,573	10.6	-	24.5%	Link
HPG	Material	26.0	-0.60%	1.2	6,776	23.0	1,746	14.9	23,300	23.7%	Link
HSG	Material	20.8	0.50%	1.6	521	12.0	1,844	11.3	79,900	17.3%	Link
VHM	RE	44.4	0.60%	0.9	7,862	22.1	5,350	8.3	38,900	14.2%	Link
KDH	RE	39.4	0.40%	1.2	1,455	5.7	765	51.4	44,100	38.1%	Link
NLG	RE	42.0	-0.80%	1.2	658	2.9	1,102	38.2	46,100	48.8%	Link
DGC	Chemicals	115.1	-0.30%	1.5	1,778	8.0	7,898	14.6	85,000	18.1%	Link
DCM	Fertilizer	38.6	-1.40%	1.2	831	8.4	2,828	13.6	41,000	7.4%	Link
GAS	O&G	74.0	0.30%	0.6	7,050	3.3	4,760	15.5	36,000	1.9%	Link
PVS	O&G	41.2	-1.00%	1.0	801	9.7	1,932	21.3	110,500	22.1%	Link
PVD	O&G	27.7	0.40%	1.3	626	6.4	1,155	24.0	45,000	15.6%	Link
POW	Utilities	13.0	0.00%	0.7	1,243	3.2	463	28.2	38,500	4.1%	Link
VHC	Fishery	72.5	0.00%	1.3	662	1.7	3,234	22.4	29,000	29.8%	Link
GMD	Logistics	78.9	-0.10%	0.8	996	1.4	4,054	19.5	14,500	48.6%	Link
VNM	Retail	70.7	1.60%	0.6	6,009	11.5	4,633	15.3	81,700	51.5%	Link
MSN	Retail	76.1	0.80%	1.2	4,682	14.3	466	163.2	27,700	28.6%	Link
MWG	Retail	68.3	-0.60%	1.3	4,060	20.0	1,507	45.3	63,800	46.9%	Link
PNJ	Retail	99.3	-0.30%	1.0	1,351	5.5	6,132	16.2	83,500	49.0%	Link
DGW	Retail	47.7	-1.20%	1.7	421	1.8	2,236	21.3	90,900	25.1%	Link
FPT	Tech	134.3	-0.40%	1.1	7,976	15.4	4,890	27.5	57,000	45.2%	Link
CTR	Tech	131.3	-0.90%	1.3	611	1.3	4,590	28.6	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	28.3	3.90%	0.9	3,352	21.7	4,137	6.8	1.7	19.5%	27.8%
VIB	Bank	19.4	-0.30%	1.1	2,350	15.6	3,048	6.4	1.3	20.5%	21.4%
TPB	Bank	16.6	6.70%	1.2	1,789	41.2	2,154	7.7	1.0	28.4%	14.2%
MSB	Bank	12.6	5.40%	1.1	1,332	18.7	2,366	5.3	0.7	29.5%	14.9%
EIB	Bank	17.9	2.60%	0.8	1,356	9.3	1,273	14.1	1.3	2.8%	9.9%
HCM	Broker	31.0	-0.50%	1.6	889	16.9	1,397	22.2	2.0	45.3%	10.6%
VCI	Broker	36.2	1.50%	1.7	844	18.9	1,763	20.5	1.8	20.1%	9.6%
VND	Broker	15.0	0.00%	1.5	932	8.5	1,591	9.5	1.3	13.5%	15.0%
BSI	Broker	49.4	-0.70%	1.6	448	1.7	2,165	22.8	2.0	40.0%	9.3%
SHS	Broker	15.7	0.60%	1.7	519	5.6	1,338	11.7	1.2	8.9%	10.5%
CTD	Const	64.6	0.60%	1.3	262	2.3	2,996	21.6	0.8	47.1%	3.6%
HHV	Const	12.1	-1.20%	1.6	213	3.8	869	13.9	0.6	7.7%	4.4%
LCG	Const	11.0	0.00%	1.6	86	1.0	766	14.3	0.8	2.1%	5.7%
SZC	IP	37.4	-0.90%	1.1	274	2.2	1,549	24.1	2.3	3.2%	12.1%
SIP	IP	72.6	-1.80%	1.4	622	0.8	5,931	12.2	3.4	2.0%	29.0%
PHR	IP	60.4	0.70%	1.0	333	0.6	3,028	19.9	2.1	18.5%	12.1%
DIG	RE	23.0	0.00%	1.7	572	8.2	151	152.7	1.8	4.7%	1.1%
CEO	RE	16.1	0.00%	2.0	354	2.6	318	50.6	1.4	4.8%	2.1%
KBC	IP	28.0	-0.40%	1.5	872	5.8	300	93.2	1.2	20.5%	1.7%
VGC	IP	44.0	-0.60%	1.2	801	2.1	1,776	24.7	2.4	4.7%	8.2%
GVR	IP	36.4	1.10%	1.5	5,921	5.2	693	52.5	2.8	0.5%	6.5%
NKG	Material	21.8	0.50%	1.6	233	5.4	1,580	13.8	1.0	13.1%	7.4%
BMP	Material	127.3	3.10%	1.2	424	1.8	11,420	11.1	3.9	82.6%	34.6%
IJC	RE	13.7	-3.90%	1.4	210	1.4	683	20.1	1.0	4.6%	6.0%
DXG	RE	16.3	0.30%	1.6	478	10.0	249	65.5	1.1	15.4%	1.9%
VRE	RE	19.2	0.50%	1.3	1,774	5.2	1,975	9.7	1.1	22.2%	11.9%
PDR	RE	22.8	-1.50%	1.7	810	6.9	557	40.9	1.8	6.4%	5.0%
DIG	RE	23.0	0.00%	1.7	572	8.2	151	152.7	1.8	4.7%	1.1%
HUT	Const	16.6	0.00%	1.0	602	0.8	64	261.6	1.7	1.5%	1.7%
C4G	Const	9.1	1.10%	1.2	-	0.1	503	18.1	0.8	0.0%	4.8%
CSV	Chemicals	39.0	-1.10%	2.0	175	3.6	4,748	8.2	1.1	3.8%	15.2%
DHC	Chemicals	37.2	-0.10%	1.2	122	0.1	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	31.8	0.00%	0.8	154	1.0	2,509	12.7	2.0	11.7%	16.5%
PC1	Utlilities	29.2	-1.00%	1.3	369	3.8	1,203	24.2	1.7	13.8%	6.1%
HDG	Utlilities	28.8	-1.40%	1.3	395	4.6	1,958	14.7	1.6	15.7%	11.8%
GEX	Utlilities	21.3	-0.20%	1.5	744	4.3	1,245	17.1	1.4	8.3%	7.0%
QTP	Utlilities	14.3	0.00%	0.6	-	0.0	1,357	10.5	1.2	1.2%	11.2%
PLX	O&G	45.6	0.40%	0.9	2,356	3.1	2,879	15.8	2.3	18.2%	13.8%
BSR	O&G	24.8	2.90%	1.0	-	16.3	2,408	10.3	1.3	0.7%	13.4%
PLC	O&G	25.0	0.00%	1.5	82	0.2	734	34.1	1.6	0.5%	4.7%
ANV	Fishery	32.5	1.10%	1.6	176	1.5	114	285.8	1.5	1.0%	1.2%
PTB	Material	61.8	-0.30%	0.8	168	0.2	4,899	12.6	1.5	24.9%	11.9%
VSC	Logistics	17.6	0.90%	1.3	205	2.0	713	24.7	1.1	3.1%	7.3%
HAH	Logistics	41.4	1.50%	1.2	204	7.0	2,800	14.8	1.8	7.7%	10.6%
VTP	Logistics	77.6	0.10%	1.5	384	1.8	2,893	26.8	5.9	6.9%	22.8%
DBC	Retail	29.5	-0.80%	1.6	402	4.7	979	30.1	1.5	12.1%	5.0%
FRT	Retail	179.0	0.20%	0.7	992	2.6	(414)	-432.0	14.6	36.1%	11.8%
QNS	Retail	48.9	0.60%	0.6	-	0.6	6,678	7.3	2.0	13.8%	28.7%
TNG	Textile	26.4	0.00%	1.3	132	2.5	2,254	11.7	1.7	19.5%	14.7%
PVT	Logistics	28.5	1.20%	1.1	413	2.1	2,805	10.2	1.4	13.2%	14.2%
DPM	Fertilizer	36.0	-0.30%	1.2	573	5.7	1,703	21.1	1.2	8.8%	5.5%
REE	Utlilities	67.4	-0.10%	1.1	1,291	1.6	3,804	17.7	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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