

STOCK MARKET

The VN-Index continued to fluctuate in the range of 1,290 – 1,300, closing at 1,290.92, almost unchanged from yesterday. The market breadth leaned negative, with 13 out of 18 sectors declining. The Oil and Gas sector led the gains, followed by the Communications sector. Conversely, the Banking sector saw the strongest increase today. Regarding foreign trading, foreign investors were net buyers on the HSX and had slight net selling on the HNX. In the upcoming sessions, the index needs a decisive candle with supportive liquidity to break above the 1,300 level and confirm the upward trend.

FUTURES CONTRACTS

All futures contracts decreased in accordance with the movement of the VN30.

COVERED WARRANTS

During the trading session on 27/09/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-0.57** points, closing at **1290.92** points. HNX-Index **-0.21** points, closing at **235.71** points.
- Pulling the index up: **CTG (+0.80)**, **STB (+0.40)**, **EIB (+0.31)**, **VPB (+0.29)**, **SHB (+0.23)**.
- Pulling the index down: **VHM (-1.04)**, **GVR (-0.39)**, **GAS (-0.29)**, **MWG (-0.28)**, **PLX (-0.20)**.
- The matched trade value of VN-Index reached VND **19,254 billion**, decreased **-4.15%** compared to the previous session. The total transaction value reached VND 21,519 billion.
- The trading range is 13.1 points. The market had **148** gainers, 95 remaining unchanged, **228** losers.
- Foreign investors' net buying value: VND **249.75 billion** on HOSE, including **FPT (VND 102.92 billion)**, **TPB (VND 96.14 billion)**, **VNM (VND 78.83 billion)**, **SSI (VND 60.99 billion)**, **CTG (VND 43.47 billion)**. Foreign investors were net sellers on HNX with the value of VND -19.45 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	1,290.92	235.71	93.90
% 1D	-0.04%	-0.09%	0.43%
TV (bil VND)	19,254	1,232	754
%1D	-4.15%	13.17%	-17.20%
Foreign (bil VND)	249.75	-19.45	-0.51

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FPT	102.92	VPB	-160.68
TPB	96.14	HPG	-72.48
VNM	78.83	MWG	-67.69
SSI	60.99	HDG	-24.34
CTG	43.47	BID	-22.31

Overview of global stock markets

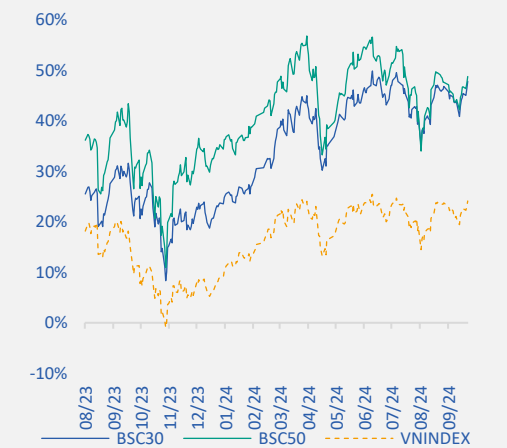
		%D	%W
SPX	5,745	0.40%	0.56%
FTSE100	8,310	0.31%	0.97%
Eurostoxx	5,044	0.68%	3.42%
Shanghai	3,088	2.89%	12.81%
Nikkei	39,822	2.57%	7.28%

Source: Bloomberg

	Close	%
Commodities		
Brent	71	-0.28%
Gold	2,673	-0.71%
Exchange rate		
USD/VND	24,760	-0.16%
EUR/VND	28,231	0.10%
JPY/VND	173	
Interest rates		
10Y-Gov bond rate	2.68%	
1M-interbank rate	4.22%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
CTG	37.00	1.65%	0.80	5.37
STB	33.60	2.60%	0.40	1.89
EIB	18.55	3.63%	0.31	1.86
VPB	19.75	0.77%	0.29	7.93
SHB	11.00	2.33%	0.23	3.66

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
DNP	26.80	9.39%	0.25	0.14
MBS	31.90	1.59%	0.20	0.55
HHC	113.90	9.84%	0.13	0.02
KSV	54.90	0.92%	0.07	0.20
BAB	12.00	0.84%	0.06	0.90

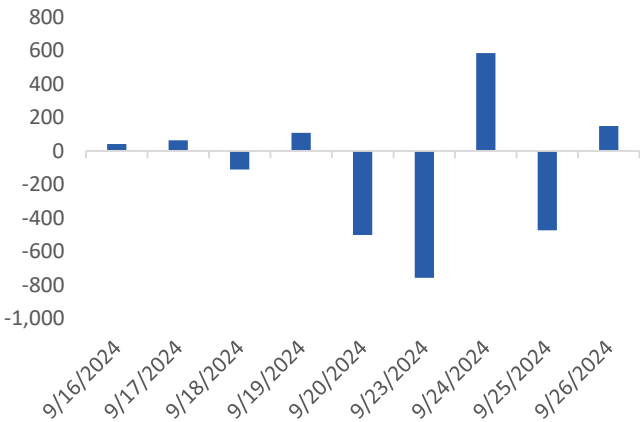
Top 5 gainers on the HSX

	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)
VHM	43.40	-2.25%	-1.04	4.35
GVR	36.00	-1.10%	-0.39	4.00
GAS	73.50	-0.68%	-0.29	2.34
MWG	67.50	-1.17%	-0.28	1.46
PLX	44.95	-1.43%	-0.20	1.27

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
IDC	58.10	-1.36%	-0.19	0.33
PVS	40.70	-1.21%	-0.17	0.48
NTP	64.00	-1.39%	-0.08	0.13
HUT	16.50	-0.60%	-0.06	0.89
SHS	15.60	-0.64%	-0.06	0.81

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	0.00%	0.7	21,033	4.0	5,962	15.5	105,000	23.3%	Link
BID	Bank	50.1	0.20%	1.1	11,619	6.5	4,006	12.5	54,578	17.2%	Link
VPB	Bank	19.8	0.80%	0.9	6,375	50.5	1,461	13.5	23,685	26.1%	Link
TCB	Bank	24.2	0.40%	1.2	6,936	16.6	3,047	7.9	-	20.9%	Link
MBB	Bank	25.7	0.00%	1.0	5,548	19.0	4,018	6.4	24,400	23.2%	Link
STB	Bank	33.6	2.60%	1.2	2,577	30.1	4,340	7.7	31,200	22.9%	Link
CTG	Bank	37.0	1.60%	1.4	8,083	23.5	3,782	9.8	19,100	26.3%	Link
ACB	Bank	25.9	-0.40%	0.8	4,706	11.4	3,676	7.0	42,500	30.0%	Link
SSI	Broker	27.6	0.40%	1.3	2,203	14.1	1,882	14.7	45,900	41.3%	Link
IDC	IP	58.1	-1.40%	1.1	780	2.8	5,573	10.4	-	24.5%	Link
HPG	Material	26.0	0.00%	1.2	6,779	32.4	1,746	14.9	23,300	23.7%	Link
HSG	Material	21.0	0.70%	1.6	525	14.8	1,844	11.4	79,900	17.3%	Link
VHM	RE	43.4	-2.30%	0.9	7,688	28.9	5,350	8.1	38,900	14.2%	Link
KDH	RE	39.0	-1.00%	1.2	1,441	4.3	765	50.9	44,100	38.1%	Link
NLG	RE	41.8	-0.70%	1.2	654	2.9	1,102	37.9	46,100	48.8%	Link
DGC	Chemicals	115.0	-0.10%	1.5	1,777	7.4	7,898	14.6	85,000	18.1%	Link
DCM	Fertilizer	38.2	-0.90%	1.2	824	7.1	2,828	13.5	41,000	7.4%	Link
GAS	O&G	73.5	-0.70%	0.6	7,005	1.6	4,760	15.4	36,000	1.9%	Link
PVS	O&G	40.7	-1.20%	1.0	791	5.0	1,932	21.1	110,500	22.1%	Link
PVD	O&G	27.2	-1.60%	1.3	616	4.3	1,155	23.6	45,000	15.6%	Link
POW	Utilities	13.0	0.00%	0.7	1,243	4.0	463	28.2	38,500	4.1%	Link
VHC	Fishery	72.0	-0.70%	1.3	658	1.4	3,234	22.3	29,000	29.8%	Link
GMD	Logistics	78.5	-0.50%	0.8	992	1.8	4,054	19.4	14,500	48.6%	Link
VNM	Retail	71.0	0.40%	0.6	6,037	8.6	4,633	15.3	81,700	51.5%	Link
MSN	Retail	75.9	-0.30%	1.2	4,672	11.5	466	162.8	27,700	28.6%	Link
MWG	Retail	67.5	-1.20%	1.3	4,015	36.1	1,507	44.8	63,800	46.9%	Link
PNJ	Retail	99.0	-0.30%	1.0	1,348	4.4	6,132	16.1	83,500	49.0%	Link
DGW	Retail	47.3	-0.80%	1.7	418	3.1	2,236	21.2	90,900	25.1%	Link
FPT	Tech	134.2	-0.10%	1.1	7,974	18.3	4,890	27.4	57,000	45.2%	Link
CTR	Tech	127.0	-3.30%	1.3	591	2.6	4,590	27.7	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	0.00%	0.9	3,353	12.1	4,137	6.8	1.7	19.5%	27.8%
VIB	Bank	19.4	-0.30%	1.1	2,345	13.6	3,048	6.3	1.3	20.5%	21.4%
TPB	Bank	16.9	1.50%	1.2	1,816	41.4	2,154	7.8	1.0	28.4%	14.2%
MSB	Bank	12.6	0.00%	1.1	1,333	6.4	2,366	5.3	0.7	29.5%	14.9%
EIB	Bank	18.6	3.60%	0.8	1,406	17.2	1,273	14.6	1.4	2.8%	9.9%
HCM	Broker	30.8	-0.80%	1.6	882	12.6	1,397	22.0	2.0	45.3%	10.6%
VCI	Broker	35.9	-0.70%	1.7	839	14.3	1,763	20.4	1.8	20.1%	9.6%
VND	Broker	15.2	1.00%	1.5	941	15.0	1,591	9.6	1.3	13.5%	15.0%
BSI	Broker	49.2	-0.40%	1.6	446	1.2	2,165	22.7	2.0	40.0%	9.3%
SHS	Broker	15.6	-0.60%	1.7	516	4.7	1,338	11.7	1.2	8.9%	10.5%
CTD	Const	64.5	-0.20%	1.3	262	1.1	2,996	21.5	0.8	47.1%	3.6%
HHV	Const	12.1	0.00%	1.6	213	2.5	869	13.9	0.6	7.7%	4.4%
LCG	Const	11.0	0.50%	1.6	86	1.2	766	14.4	0.8	2.1%	5.7%
SZC	IP	37.3	-0.30%	1.1	273	1.8	1,549	24.1	2.3	3.2%	12.1%
SIP	IP	72.5	-0.10%	1.4	621	0.6	5,931	12.2	3.4	2.0%	29.0%
PHR	IP	59.6	-1.30%	1.0	328	0.5	3,028	19.7	2.1	18.5%	12.1%
DIG	RE	23.2	0.70%	1.7	576	12.1	151	153.7	1.8	4.7%	1.1%
CEO	RE	16.1	0.00%	2.0	354	5.1	318	50.6	1.4	4.8%	2.1%
KBC	IP	28.0	0.40%	1.5	876	4.8	300	93.5	1.2	20.5%	1.7%
VGC	IP	43.9	-0.10%	1.2	801	1.7	1,776	24.7	2.4	4.7%	8.2%
GVR	IP	36.0	-1.10%	1.5	5,858	3.8	693	51.9	2.8	0.5%	6.5%
NKG	Material	21.8	0.20%	1.6	234	6.0	1,580	13.8	1.0	13.1%	7.4%
BMP	Material	123.3	-3.10%	1.2	411	1.2	11,420	10.8	3.8	82.6%	34.6%
IJC	RE	13.7	0.00%	1.4	210	0.9	683	20.1	1.0	4.6%	6.0%
DXG	RE	16.6	1.50%	1.6	485	17.0	249	66.5	1.1	15.4%	1.9%
VRE	RE	19.4	1.00%	1.3	1,793	9.2	1,975	9.8	1.1	22.2%	11.9%
PDR	RE	22.8	0.00%	1.7	810	8.3	557	40.9	1.8	6.4%	5.0%
DIG	RE	23.2	0.70%	1.7	576	12.1	151	153.7	1.8	4.7%	1.1%
HUT	Const	16.5	-0.60%	1.0	599	3.2	64	260.0	1.7	1.5%	1.7%
C4G	Const	9.1	0.00%	1.2	-	0.2	503	18.1	0.8	0.0%	4.8%
CSV	Chemicals	38.6	-1.00%	2.0	174	4.0	4,748	8.1	1.1	3.8%	15.2%
DHC	Chemicals	37.2	0.00%	1.2	122	0.1	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	31.7	-0.50%	0.8	153	0.5	2,509	12.6	2.0	11.7%	16.5%
PC1	Utlilities	29.2	0.00%	1.3	369	3.0	1,203	24.2	1.7	13.8%	6.1%
HDG	Utlilities	28.2	-2.30%	1.3	386	6.7	1,958	14.4	1.6	15.7%	11.8%
GEX	Utlilities	21.4	0.50%	1.5	748	5.6	1,245	17.2	1.4	8.3%	7.0%
QTP	Utlilities	14.2	-0.70%	0.6	-	0.2	1,357	10.5	1.2	1.2%	11.2%
PLX	O&G	45.0	-1.40%	0.9	2,324	2.9	2,879	15.6	2.2	18.2%	13.8%
BSR	O&G	24.5	-1.20%	1.0	-	5.8	2,408	10.2	1.3	0.7%	13.4%
PLC	O&G	24.9	-0.40%	1.5	82	0.1	734	33.9	1.6	0.5%	4.7%
ANV	Fishery	33.2	2.30%	1.6	180	2.8	114	292.4	1.6	1.0%	1.2%
PTB	Material	61.6	-0.30%	0.8	168	0.1	4,899	12.6	1.5	24.9%	11.9%
VSC	Logistics	17.6	0.00%	1.3	205	2.0	713	24.7	1.1	3.1%	7.3%
HAH	Logistics	41.1	-0.60%	1.2	203	4.3	2,800	14.7	1.8	7.7%	10.6%
VTP	Logistics	78.8	1.50%	1.5	390	3.5	2,893	27.2	6.0	6.9%	22.8%
DBC	Retail	29.0	-1.70%	1.6	395	6.3	979	29.6	1.4	12.1%	5.0%
FRT	Retail	178.0	-0.60%	0.7	987	3.3	(414)	-429.6	14.6	36.1%	11.8%
QNS	Retail	48.4	-1.00%	0.6	-	0.4	6,678	7.2	1.9	13.8%	28.7%
TNG	Textile	25.9	-1.90%	1.3	129	2.5	2,254	11.5	1.6	19.5%	14.7%
PVT	Logistics	28.2	-1.10%	1.1	408	1.7	2,805	10.1	1.4	13.2%	14.2%
DPM	Fertilizer	36.0	0.00%	1.2	573	4.4	1,703	21.1	1.2	8.8%	5.5%
REE	Utlilities	66.7	-1.00%	1.1	1,278	1.3	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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