

MARKET TREND FOREACAST

	Negative	Neutral	Positive
Day 2/4/2024		●	
Week 1/4-5/4/2024		●	
Month 04/2024		●	

STOCK MARKET

VN-Index struggled around the 1,280 threshold all day today before closing at 1,281.52 points, down more than 2 points compared to the previous session. Market breadth tilted to the negative side with 10/18 sectors decreasing, of which the Chemical led the decline, followed by Insurance,... Regarding foreign investors, today they continued to net sell more than 700 billion dong on HSX. The accumulation zone of VN-Index has moved from 1,265 - 1,280 to 1,280 - 1,300, and the index needs a directional candle with supportive liquidity to break out of this accumulation zone

FUTURES CONTRACTS

Futures contracts decreased in accordance with the movement of VN30.

COVERED WARRANTS

During the trading session on April 1st, 2024, warrants fluctuated according to the correction of the underlying stock.

HIGHLIGHT

- VN-Index **-2.57** points, closing at **1281.52** points. HNX-Index +0.32 points, closing at 242.9 points.
- Pulling the index up: **HVN (+0.52)**, **VCB (+0.41)**, **GAS (+0.23)**, **DIG (+0.2)**, **VIC (+0.19)**.
- Pulling the index down: **CTG (-0.71)**, **MBB (-0.63)**, **VNM (-0.3)**, **DGC (-0.28)**, **MSN (-0.28)**.
- The matched trade value of VN-Index reached VND **21,508** billion, increased **11.12%** compared to the previous session. The total transaction value reached VND 23,232 billion.
- The trading range is 12.71 points. The market had **144** gainers, 77 remaining unchanged, **327** losers.
- Foreign investors' net selling value: **VND -722.97** billion on HOSE, including **MSN (VND -248.10 billion)**, **SSI (VND -170.15 billion)**, **VNM (VND -159.28 billion)**, **VCI (VND -98.19 billion)**, **DGC (VND -85.72 billion)**. Foreign investors were net buyers on HNX with the value of VND **58.60** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.30%**. Positive stocks: **PVS (+3.83%)**, **PVD (+1.55%)**, **NLG (+1.04%)**.
- BSC50 **+0.06%**. Positive stocks: **VTP (+4.66%)**, **DIG (+4.04%)**, **DIG (+4.04%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.30%	0.06%	-0.20%	-0.33%
1 week	2.03%	1.89%	1.28%	2.12%
1 months	2.33%	1.88%	1.95%	2.77%
3 months	22.76%	17.32%	7.19%	6.21%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Điểm	1,281.52	242.90	91.33
% 1D	-0.20%	0.13%	-0.26%
GTGD (tỷ VND)	21,508	2,180	502
%1D	11.12%	31.08%	-10.31%
GDNN (tỷ VND)	-722.97	58.60	-16.63

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
DIG	165.62	MSN	-248.10
MWVG	129.70	SSI	-170.15
PDR	86.71	VNM	-159.28
STB	47.11	VCI	-98.19
NVL	29.41	DGC	-85.72

Overview of global stock markets

		%D	%W
SPX	5,254	0.11%	0.24%
FTSE100	7,953	0.26%	0.89%
Eurostoxx	4,428	0.29%	0.58%
Shanghai	3,077	1.19%	1.69%
Nikkei	39,841	-1.31%	-1.49%

Source: Bloomberg

Commodities

	Close	%
Brent	87.2	-0.27%
Gold	2,283.4	2.98%

Exchange rate

		%
USD/VND	24,970.0	0.00%
EUR/VND	27,491.0	0.16%
JPY/VND	168.0	0.00%

Interst rates

		%
1M-interbank rate	2.71%	-0.04%
10Y-Gov bond rate	0.00%	0.00%

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)
HVN	13.50	6.67%	0.52	5.58
VCB	94.90	0.32%	0.41	1.22
GAS	80.20	0.50%	0.23	0.75
DIG	32.20	4.04%	0.20	26.74
VIC	47.65	0.42%	0.19	4.45

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PVS	39.20	3.83%	2.91	15.24
SHS	20.10	1.00%	0.64	24.62
VIF	16.60	2.41%	0.56	0.00
CEO	22.90	0.87%	0.41	11.33
NDN	11.90	6.72%	0.24	0.92

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
DXS	7.30	6.99%	0.08	3.95
CLW	37.25	6.98%	0.01	0.00
SKG	15.10	6.95%	0.02	2.59
SGR	21.20	6.84%	0.02	0.14
HVN	13.50	6.67%	0.52	5.58

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
HAT	46.40	9.91%	0.06	0.00
ONE	6.10	9.84%	0.02	0.19
SDA	6.10	9.84%	0.07	0.44
BTW	37.80	9.79%	0.15	0.00
MED	22.90	9.17%	0.11	0.00

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
CTG	35.55	-1.55%	-0.71	7.92
MBB	25.40	-1.97%	-0.63	29.11
VNM	67.60	-0.89%	-0.30	5.01
DGC	123.40	-2.51%	-0.28	2.75
MSN	74.20	-1.08%	-0.28	7.70

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
HUT	19.40	-1.03%	-0.69	3.36
VCS	72.10	-1.53%	-0.68	0.10
IDC	59.00	-0.85%	-0.64	0.92
MBS	30.30	-0.99%	-0.51	4.75
BAB	12.60	-0.79%	-0.35	0.00

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HPX	7.86	-7.00%	-0.04	46.82
AGM	6.71	-6.86%	0.00	0.81
PMG	9.00	-6.67%	-0.01	0.00
SVD	3.47	-6.05%	0.00	0.29
SCD	14.50	-5.86%	0.00	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
HMR	22.50	-9.78%	-0.04	0.34
VC6	15.00	-9.33%	-0.04	0.00
HLC	15.90	-8.81%	-0.13	0.00
L43	3.60	-8.33%	0.00	0.00
L61	3.80	-7.89%	-0.01	0.03

Figure 1
HSX-Index Intraday

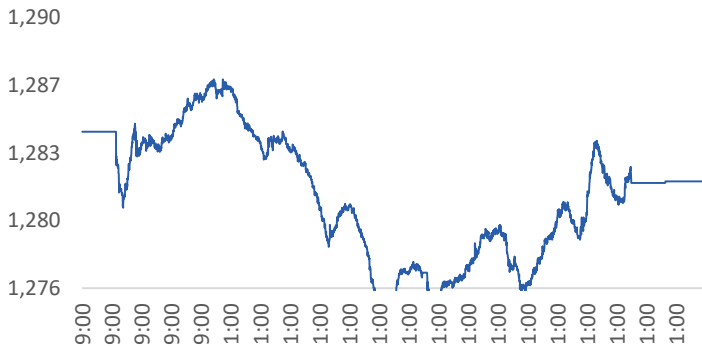


Figure 2
HNX-Index Intraday

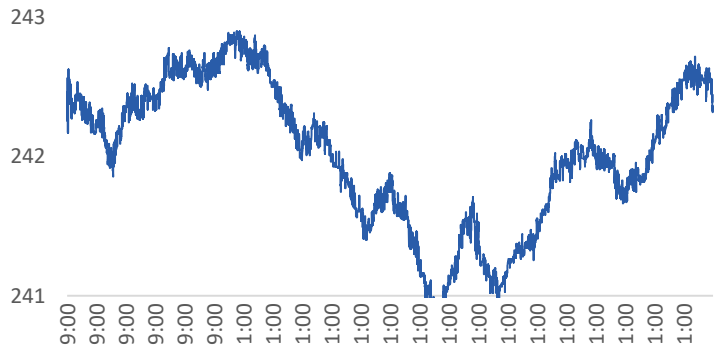


Figure 3
Proprietary trading

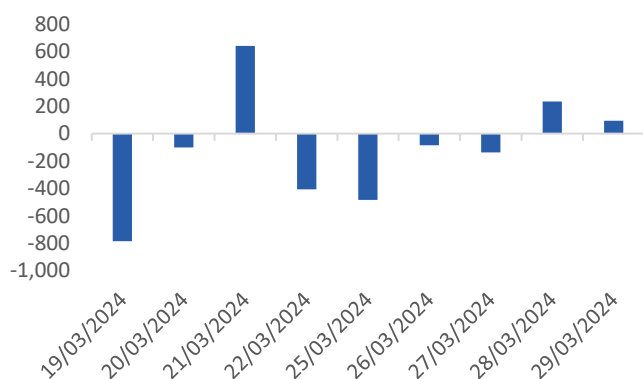
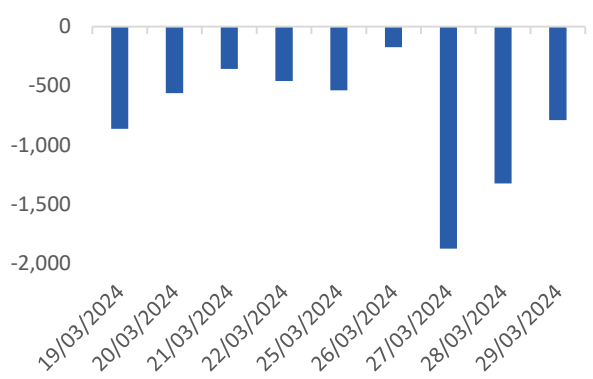


Figure 4
Foreign transactions



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 ownership	Link
VCB	Bank	95.2	0.30%	0.7	21,464	4.7	5,797	16.4	105,000	23.5%	Link
BID	Bank	52.1	0.00%	1.0	11,980	2.9	3,572	14.6	54,578	17.3%	Link
VPB	Bank	19.6	-0.50%	1.1	6,289	9.3	1,461	13.4	23,685	28.0%	Link
TCB	Bank	47.4	-0.20%	1.1	6,742	16.4	5,052	9.4	-	22.5%	Link
MBB	Bank	24.9	-2.00%	1.0	5,310	19.3	3,448	7.2	24,400	23.2%	Link
STB	Bank	31.4	-0.60%	1.0	2,388	30.6	3,600	8.7	31,200	22.5%	Link
CTG	Bank	35.0	-1.50%	1.0	7,582	11.2	3,279	10.7	19,100	27.1%	Link
ACB	Bank	28.4	-0.20%	0.8	4,458	7.1	3,722	7.6	42,500	30.0%	Link
SSI	Securities	38.8	0.80%	1.2	2,346	48.7	1,090	35.6	45,900	43.2%	Link
IDC	IP	58.5	-0.80%	1.0	779	2.2	3,900	15.0	-	17.6%	Link
HPG	Material	30.1	-0.50%	1.3	7,060	25.2	1,177	25.6	23,300	24.5%	Link
HSG	Material	23.6	-0.20%	1.6	586	11.6	1,318	17.9	79,900	22.1%	Link
VHM	Real estate	42.9	0.10%	1.3	7,535	13.0	7,586	5.7	38,900	22.4%	Link
KDH	Real estate	38.0	0.50%	1.3	1,225	7.3	892	42.6	44,100	38.0%	Link
NLG	Real estate	43.8	1.00%	1.2	680	7.2	746	58.7	46,100	42.9%	Link
DGC	Chemicals	120.3	-2.50%	1.5	1,843	11.7	7,968	15.1	85,000	18.9%	Link
DCM	Fertilizer	34.6	-1.70%	1.4	738	5.9	2,093	16.5	41,000	10.9%	Link
GAS	O&G	80.6	0.50%	0.7	7,467	2.4	5,018	16.1	36,000	2.6%	Link
PVS	O&G	40.7	3.80%	0.9	785	25.0	1,792	22.7	110,500	20.8%	Link
PVD	O&G	32.8	1.50%	1.2	737	8.7	1,068	30.7	45,000	23.3%	Link
POW	Utilities	11.4	-0.40%	0.8	1,072	2.5	424	26.8	38,500	4.0%	Link
VHC	Fishery	77.0	-1.80%	1.1	697	2.1	3,865	19.9	29,000	32.2%	Link
GMD	Logistics	79.5	-0.30%	1.1	981	3.8	6,736	11.8	14,500	48.2%	Link
VNM	Retail	67.0	-0.90%	0.7	5,648	13.5	4,214	15.9	81,700	53.9%	Link
MSN	Retail	73.4	-1.10%	1.5	4,236	22.8	(338)	-216.9	27,700	28.2%	Link
MWG	Retail	51.4	0.60%	1.6	3,032	28.4	115	448.7	63,800	44.5%	Link
PNJ	Retail	98.9	0.00%	0.7	1,335	4.3	5,893	16.8	83,500	49.0%	Link
DGW	Retail	65.7	-0.60%	1.6	443	3.8	2,112	31.1	90,900	23.4%	Link
FPT	Technology	116.8	0.30%	0.8	5,984	9.3	4,576	25.5	57,000	49.0%	Link
CTR	Technology	134.5	-2.70%	1.0	621	2.6	4,515	29.8	108,000	10.1%	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 ownership	ROE (%)
HDB	Bank	24.0	-0.40%	0.7	2,820	5.8	2,746	8.7	1.8	19.6%	23.2%
VIB	Bank	24.3	-1.20%	1.2	2,487	5.7	3,534	6.9	1.8	20.5%	28.8%
TPB	Bank	18.8	-1.80%	1.1	1,665	7.6	2,697	7.0	1.3	29.8%	19.8%
MSB	Bank	14.4	-1.00%	1.3	1,162	3.6	2,405	6.0	1.0	30.0%	17.8%
EIB	Bank	18.2	-1.10%	1.0	1,278	11.2	1,462	12.4	1.7	1.8%	12.6%
HCM	Securities	29.8	0.80%	1.3	905	11.5	757	39.3	2.8	41.0%	7.3%
VCI	Securities	53.6	-0.40%	1.7	946	17.7	780	68.8	3.2	21.7%	4.7%
VND	Securities	22.9	-0.20%	1.6	1,125	26.5	467	49.0	1.9	22.6%	3.8%
BID	Bank	52.1	0.00%	1.0	11,980	2.9	3,572	14.6	2.8	17.3%	20.7%
SHS	Securities	20.3	1.00%	1.6	666	19.5	507	40.0	1.7	13.2%	4.3%
LCG	Construction	14.2	2.20%	1.5	108	7.0	648	21.8	1.1	2.1%	3.8%
HUT	Construction	19.2	-1.00%	1.7	691	2.6	34	558.7	2.1	1.6%	1.3%
CTD	Construction	71.6	-1.90%	0.8	289	6.1	1,881	38.1	0.9	44.3%	0.8%
HHV	Construction	15.4	0.30%	1.4	257	5.2	735	21.0	1.2	6.7%	4.2%
C4G	Construction	11.5	0.90%	1.5	-	0.4	432	26.6	1.1	0.0%	5.2%
DIG	IP	33.5	4.00%	1.8	824	36.1	289	115.9	2.6	5.2%	1.1%
CEO	IP	23.1	0.90%	1.0	480	10.6	348	66.5	1.9	5.6%	8.3%
KBC	IP	34.4	-1.60%	1.5	1,065	18.8	2,490	13.8	1.3	20.8%	18.9%
VGC	IP	58.7	0.50%	1.3	1,062	2.6	2,820	20.8	2.8	5.4%	13.6%
SZC	IP	43.8	-0.60%	1.3	318	1.9	1,218	35.9	4.5	3.2%	10.9%
SIP	IP	91.8	-2.30%	1.5	673	1.0	5,024	18.3	4.1	0.3%	26.5%
PHR	IP	63.5	-0.60%	1.1	347	1.8	4,368	14.5	2.3	15.8%	26.9%
GVR	IP	33.0	-0.60%	1.5	5,317	5.0	538	61.2	2.4	0.3%	7.0%
NKG	Material	25.8	0.40%	1.6	274	7.5	464	55.5	1.3	16.0%	13.5%
BMP	Chemicals	112.2	2.00%	0.5	370	0.8	12,704	8.8	3.4	85.9%	38.4%
IJC	Real estate	16.0	1.60%	1.7	245	2.3	1,046	15.3	1.6	5.9%	10.9%
DXG	Real estate	20.2	1.80%	1.8	587	19.8	245	82.3	1.0	20.0%	3.4%
VRE	Real estate	25.7	-0.60%	1.2	2,356	6.1	1,940	13.2	1.5	31.0%	10.7%
PDR	Real estate	32.8	3.10%	1.9	979	20.6	926	35.5	2.5	7.4%	9.0%
CSV	Chemicals	66.3	2.30%	1.4	118	2.2	4,558	14.5	2.0	3.7%	21.0%
DHC	Chemicals	43.0	-1.50%	1.0	140	0.8	3,840	11.2	1.9	35.8%	18.1%
PLX	O&G	37.4	0.40%	1.0	1,920	1.0	2,123	17.6	1.8	17.1%	11.7%
PLC	O&G	34.4	0.00%	1.4	112	0.4	1,333	25.8	2.1	1.2%	8.5%
BSR	O&G	19.3	0.00%	1.2	-	3.8	2,756	7.0	1.1	0.8%	9.7%
DRC	Tyre	33.5	0.00%	0.7	160	1.4	2,086	16.1	2.1	13.6%	13.5%
PC1	Utilities	28.2	-0.70%	1.3	354	4.5	106	266.9	1.5	8.5%	5.0%
HDG	Utilities	29.5	0.90%	1.3	364	3.0	2,004	14.7	1.3	22.8%	16.8%
GEX	Utilities	25.2	1.20%	1.9	866	19.2	299	84.3	1.1	12.6%	5.4%
QTP	Utilities	16.1	1.30%	0.6	-	0.3	1,366	11.8	1.4	1.2%	9.9%
REE	Utilities	63.3	-0.80%	0.9	1,044	2.8	4,974	12.7	1.3	49.0%	18.5%
ANV	Fishery	34.4	-0.90%	1.4	185	2.7	329	104.7	1.8	3.0%	10.0%
PTB	Fishery	64.1	-2.70%	0.7	173	1.0	4,347	14.7	1.5	20.9%	13.4%
PVT	Logistics	28.5	-0.50%	0.9	372	3.7	2,660	10.7	1.0	12.3%	16.4%
VSC	Logistics	23.0	-0.60%	1.4	248	4.8	296	77.7	1.9	2.5%	7.9%
HAH	Logistics	42.7	-0.50%	1.4	182	2.6	3,681	11.6	1.4	3.9%	24.6%
VTP	Logistics	92.0	4.70%	1.1	452	7.7	3,122	29.5	7.2	9.4%	15.1%
DBC	Retail	32.0	-1.20%	1.4	312	10.5	103	309.7	1.7	4.5%	2.9%
FRT	Retail	153.5	-1.60%	0.7	844	3.3	(2,577)	-59.6	14.0	36.2%	11.8%
QNS	Retail	49.2	-0.80%	0.6	-	0.7	6,134	8.0	2.0	15.5%	24.3%
DPM	Fertilizer	35.6	-0.70%	1.3	561	4.6	1,352	26.3	1.3	10.0%	19.1%
TNG	Textile	22.3	0.50%	1.0	102	1.4	1,997	11.2	1.5	18.6%	17.1%

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, Logistic, 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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