

MARKET TREND FOREACAST

	Negative	Neutral	Positive
Day 12/4/2024		●	
Week 8/4-12/4/2024			●
Month 04/2024	●		

STOCK MARKET

VN-Index just opened the morning session and fell to the threshold of 1,250. However, the bottom-catching force there helped the index go up and close at 1,258.20 points, almost unchanged from yesterday. Market breadth tilted to the negative side with 10/18 sectors decreasing. These sectors, in general, only adjusted slightly. On the contrary, the Automobile and spare parts and Retail had positive sessions. Regarding foreign investors, today they were net buyers on both HSX and HNX. VN-Index may continue to trade in the 1,250 - 1,270 range in the coming sessions until there is some clearer signals.

FUTURES CONTRACTS

Futures contracts decreased according to the movement of VN30, except for VN30F2404.

COVERED WARRANTS

During the trading session on April 11, 2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-0.36** points, closing at **1258.2** points. HNX-Index **+0.28** points, closing at **239.07** points.
- Pulling the index up: **BID (+1.42)**, **HPG (+0.36)**, **FPT (+0.34)**, **GVR (+0.25)**, **DGC (+0.19)**.
- Pulling the index down: **VCB (-0.68)**, **TCB (-0.47)**, **LPB (-0.27)**, **BCM (-0.25)**, **MSN (-0.24)**.
- The matched trade value of VN-Index reached VND **15,096** billion, decreased **-0.53%** compared to the previous session. The total transaction value reached VND 16,503 billion.
- The trading range is 13.92 points. The market had **150** gainers, 84 remaining unchanged, **308** losers.
- Foreign investors' net buying value: VND **48.54** billion on HOSE, including **VPD (VND 153.04 billion)**, **TCH (VND 94.03 billion)**, **SSI (VND 85.46 billion)**, **MWG (VND 74.81 billion)**, **SBT (VND 59.18 billion)**. Foreign investors were net buvers on HNX with the value of VND **77.45** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+0.13%**. Positive stocks: **PVS (+2.65%)**, **BID (+1.92%)**, **DGC (+1.70%)**.
- BSC50 **+0.07%**. Positive stocks: **NKG (+3.83%)**, **FRT (+3.71%)**, **DIG (+2.17%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.13%	0.07%	-0.03%	-0.08%
1 week	-1.55%	-2.99%	-0.76%	-0.30%
1 months	-1.63%	-1.43%	-1.70%	-2.73%
3 months	14.84%	13.90%	10.36%	11.01%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,258.20	239.07	90.92
% 1D	-0.03%	0.12%	0.30%
TV (bil VND)	15,096	1,662	452
%1D	-0.53%	36.84%	-24.09%
Foreign (bil VND)	48.54	77.45	24.82

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VPD	153.04	VHM	-246.16
TCH	94.03	KDC	-86.68
SSI	85.46	VIC	-74.47
MWG	74.81	VNM	-52.68
SBT	59.18	NVL	-50.03

Overview of global stock markets

		%D	%W
SPX	5,161	-0.95%	-0.98%
FTSE100	7,946	-0.19%	-0.38%
Eurostoxx	4,378	-0.09%	-0.76%
Shanghai	3,034	0.23%	-1.32%
Nikkei	39,445	-0.30%	-0.94%

Source: Bloomberg

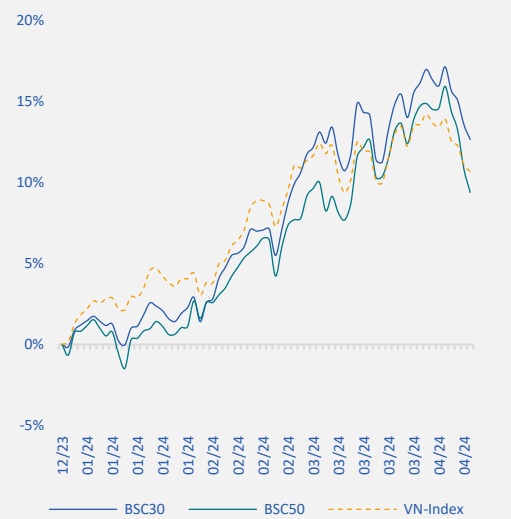
	Close	%
Commodities		
Brent	91	-0.18%
Gold	2,357	1.16%

Exchange rate		
USD/VND	25,170	0.16%
EUR/VND	27,617	-0.83%
JPY/VND	167	-0.60%

Interst rates		
10Y-Gov bond rate	2.78%	0.02%
1M-interbank rate	3.71%	

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)
BID	52.00	1.92%	1.42	2.28
HPG	29.65	0.84%	0.36	19.48
FPT	113.80	0.97%	0.34	1.62
GVR	31.65	0.79%	0.25	2.72
DGC	117.90	1.70%	0.19	1.52

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PVS	41.50	2.89%	2.30	8.88
SHS	19.80	1.52%	0.97	19.85
MBS	28.80	0.69%	0.34	3.01
VFS	18.80	3.72%	0.34	0.76
KSV	28.20	1.42%	0.32	0.01

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
TDW	46.50	6.99%	0.01	0.00
DXV	5.31	6.97%	0.00	0.01
APC	6.84	6.87%	0.00	0.03
DCL	25.65	6.82%	0.03	0.48
DAG	2.98	6.71%	0.00	0.88

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
CCR	11.00	10.00%	0.12	0.02
ARM	24.30	9.88%	0.03	0.00
TA9	14.20	9.86%	0.07	0.34
LDP	22.40	9.82%	0.12	0.06
TJC	13.80	9.42%	0.05	0.00

Figure 1

HSX-Index Intraday

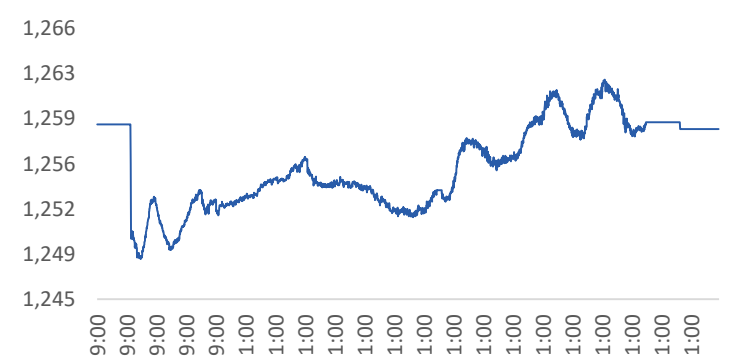
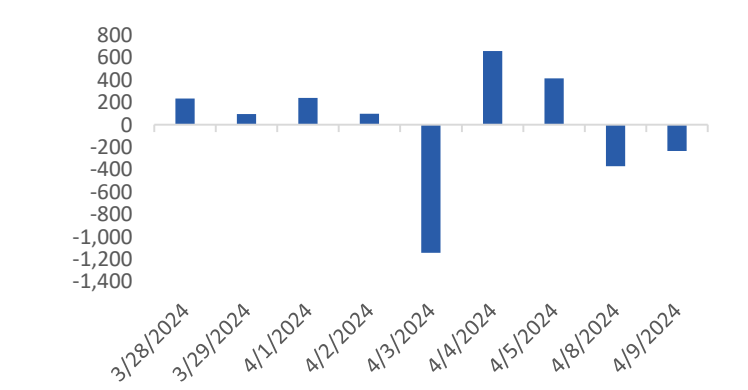


Figure 3

Proprietary trading



Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VCB	94.50	-0.53%	-0.68	0.82
TCB	45.65	-1.20%	-0.47	14.38
LPB	18.75	-2.40%	-0.27	7.41
BCM	61.30	-1.63%	-0.25	0.68
MSN	72.50	-0.97%	-0.24	3.58

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
VIF	16.80	-4.17%	-0.92	0.00
HUT	18.50	-1.08%	-0.69	2.07
SEB	50.10	-9.98%	-0.56	0.00
NVB	10.50	-1.90%	-0.43	0.08
CEO	22.50	-0.89%	-0.40	9.88

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
TTE	9.44	-6.99%	0.00	0.00
POM	4.03	-6.95%	-0.02	2.03
PSH	5.85	-6.84%	-0.01	0.70
HAS	7.38	-6.78%	0.00	0.00
QBS	1.51	-6.62%	0.00	2.09

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
SEB	50.10	-9.98%	-0.56	0.00
DHP	12.20	-9.84%	-0.04	0.00
SFN	26.80	-9.70%	-0.03	0.00
PIA	29.00	-9.66%	-0.04	0.00
DPC	8.60	-9.30%	-0.01	0.00

Figure 2

HNX-Index Intraday

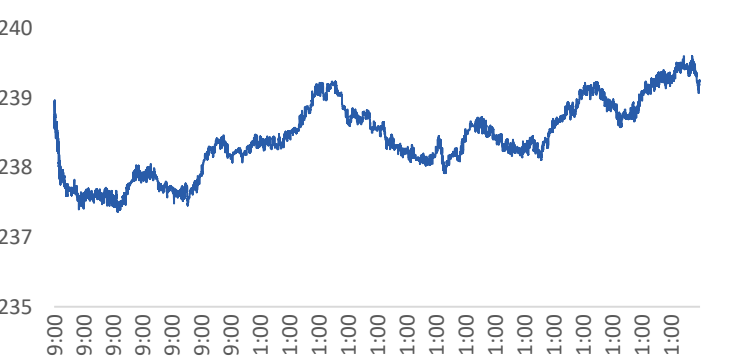
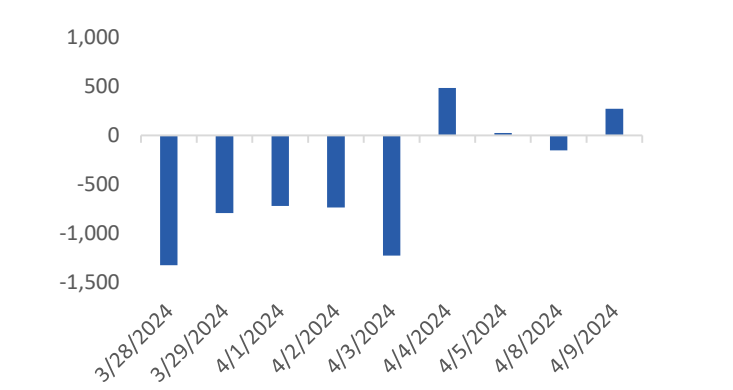


Figure 4

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	94.0	-0.50%	0.7	21,061	2.9	5,910	15.9	105,000	23.5%	<a href="#">Link</a>
BID	Bank	53.0	1.90%	1.0	12,112	4.8	3,772	14.0	54,578	17.3%	<a href="#">Link</a>
VPB	Bank	19.4	0.00%	1.0	6,154	7.4	1,257	15.4	23,685	27.7%	<a href="#">Link</a>
TCB	Bank	45.1	-1.20%	1.2	6,369	20.6	5,111	8.8	-	22.5%	<a href="#">Link</a>
MBB	Bank	23.8	-0.20%	1.1	5,034	8.6	3,966	6.0	24,400	22.9%	<a href="#">Link</a>
STB	Bank	28.8	-0.90%	1.0	2,180	12.1	4,094	7.0	31,200	24.0%	<a href="#">Link</a>
CTG	Bank	33.7	0.10%	1.1	7,255	5.6	3,706	9.1	19,100	27.1%	<a href="#">Link</a>
ACB	Bank	27.2	0.20%	0.8	4,227	12.3	4,131	6.6	42,500	30.0%	<a href="#">Link</a>
SSI	Securities	37.2	0.50%	1.2	2,233	17.7	1,529	24.3	45,900	43.7%	<a href="#">Link</a>
IDC	IP	57.5	0.00%	1.0	761	2.7	4,223	13.6	-	21.4%	<a href="#">Link</a>
HPG	Material	29.9	0.80%	1.3	6,970	23.1	1,176	25.4	23,300	24.8%	<a href="#">Link</a>
HSG	Material	22.9	1.10%	1.6	566	10.8	1,321	17.3	79,900	21.6%	<a href="#">Link</a>
VHM	Real estate	44.2	-0.10%	1.2	7,707	25.8	7,664	5.8	38,900	20.9%	<a href="#">Link</a>
KDH	Real estate	36.2	0.70%	1.3	1,162	4.0	895	40.5	44,100	39.0%	<a href="#">Link</a>
NLG	Real estate	42.3	-0.50%	1.2	652	3.1	1,257	33.6	46,100	47.9%	<a href="#">Link</a>
DGC	Chemicals	119.9	1.70%	1.6	1,825	7.3	8,163	14.7	85,000	18.9%	<a href="#">Link</a>
DCM	Fertilizer	33.4	0.00%	1.4	709	2.8	2,095	15.9	41,000	10.9%	<a href="#">Link</a>
GAS	O&G	78.8	-0.50%	0.7	7,255	2.0	5,053	15.6	36,000	2.4%	<a href="#">Link</a>
PVS	O&G	42.7	2.90%	0.7	818	15.2	2,148	19.9	110,500	19.2%	<a href="#">Link</a>
PVD	O&G	32.0	0.50%	1.2	712	7.3	1,052	30.4	45,000	19.5%	<a href="#">Link</a>
POW	Utilities	11.2	-0.90%	0.8	1,052	2.5	443	25.3	38,500	3.7%	<a href="#">Link</a>
VHC	Fishery	73.5	-0.70%	1.1	661	1.4	4,793	15.3	29,000	32.0%	<a href="#">Link</a>
GMD	Logistics	79.3	0.40%	1.1	987	2.0	7,357	10.8	14,500	48.3%	<a href="#">Link</a>
VNM	Retail	66.6	-0.30%	0.7	5,580	7.9	4,246	15.7	81,700	51.1%	<a href="#">Link</a>
MSN	Retail	71.8	-1.00%	1.5	4,118	10.3	293	245.4	27,700	27.8%	<a href="#">Link</a>
MWG	Retail	52.3	0.60%	1.5	3,066	14.6	115	456.2	63,800	45.7%	<a href="#">Link</a>
PNJ	Retail	100.0	-0.60%	0.7	1,341	3.1	6,010	16.6	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	62.8	1.30%	1.7	421	3.9	2,121	29.6	90,900	23.4%	<a href="#">Link</a>
FPT	Technology	114.9	1.00%	0.8	5,850	7.1	5,091	22.6	57,000	49.0%	<a href="#">Link</a>
CTR	Technology	122.9	-2.20%	1.0	564	3.0	4,510	27.3	108,000	10.1%	<a href="#">Link</a>

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	24.0	0.20%	0.8	2,802	5.4	3,482	6.9	1.6	19.5%	25.4%
VIB	Bank	22.9	0.00%	1.3	2,329	4.2	3,376	6.8	1.5	20.5%	24.3%
TPB	Bank	18.4	0.00%	1.1	1,620	5.1	2,027	9.1	1.2	28.7%	13.7%
MSB	Bank	14.4	0.00%	1.3	1,150	1.4	2,322	6.2	0.9	30.0%	16.0%
EIB	Bank	18.2	1.10%	1.0	1,267	8.2	1,244	14.6	1.4	3.5%	10.1%
HCM	Securities	28.8	1.10%	1.4	813	6.0	1,475	19.5	1.6	31.9%	8.3%
VCI	Securities	51.0	0.40%	1.8	894	9.2	1,124	45.4	3.0	21.4%	7.1%
VND	Securities	21.8	-0.90%	1.6	1,064	9.2	1,662	13.1	1.6	18.5%	13.1%
BID	Bank	53.0	1.90%	1.0	12,112	4.8	3,772	14.0	2.6	17.3%	20.3%
SHS	Securities	20.1	1.50%	1.6	655	15.8	688	29.2	1.6	9.8%	5.7%
LCG	Construction	12.9	-1.10%	1.6	98	3.4	546	23.6	1.0	2.2%	4.6%
HUT	Construction	18.3	-1.10%	1.6	655	1.5	53	346.1	1.4	0.0%	0.7%
CTD	Construction	69.6	-1.00%	0.8	279	2.6	1,894	36.7	0.8	44.3%	2.3%
HHV	Construction	15.0	-0.30%	1.3	248	4.3	782	19.2	0.7	9.7%	4.2%
C4G	Construction	10.9	-0.90%	1.5	-	0.6	365	29.9	1.0	0.0%	4.9%
DIG	IP	33.0	2.20%	1.7	807	29.2	195	169.5	2.5	6.1%	2.1%
CEO	IP	22.3	-0.90%	1.0	460	8.8	293	76.1	1.8	5.6%	2.4%
KBC	IP	33.2	0.60%	1.5	1,022	8.5	2,646	12.5	1.3	22.5%	11.7%
VGC	IP	56.0	0.00%	1.3	1,006	1.1	2,717	20.6	2.6	5.3%	12.5%
SZC	IP	40.5	-1.00%	1.4	292	1.8	1,824	22.2	2.8	2.2%	13.4%
SIP	IP	81.1	-0.20%	1.6	591	0.5	5,098	15.9	3.7	0.8%	26.9%
PHR	IP	58.9	-0.80%	1.1	320	1.4	4,574	12.9	2.1	17.8%	18.3%
GVR	IP	31.9	0.80%	1.6	5,115	3.5	656	48.6	2.3	0.5%	6.2%
NKG	Material	25.8	3.80%	1.6	272	10.3	446	57.7	1.3	13.2%	2.3%
BMP	Chemicals	112.5	-0.30%	0.5	369	0.7	12,717	8.8	3.4	85.9%	39.1%
IJC	Real estate	14.6	-1.40%	1.7	221	1.6	1,477	9.9	1.0	3.0%	10.3%
DXG	Real estate	19.2	-1.80%	1.8	556	12.2	239	80.7	1.0	20.2%	1.1%
VRE	Real estate	23.9	-1.40%	1.2	2,177	3.2	1,940	12.3	1.4	29.0%	12.4%
PDR	Real estate	31.6	0.00%	1.8	936	11.1	926	34.1	2.4	8.2%	7.2%
CSV	Chemicals	62.5	-1.00%	1.4	111	1.1	4,732	13.2	1.9	3.7%	16.1%
DHC	Chemicals	41.6	0.00%	1.0	134	0.2	3,843	10.8	1.8	35.8%	17.2%
PLX	O&G	36.3	-0.80%	1.0	1,849	1.2	2,230	16.3	1.6	17.5%	10.7%
PLC	O&G	32.0	-0.30%	1.4	104	0.3	1,261	25.4	2.0	1.1%	8.4%
BSR	O&G	19.7	1.00%	1.2	-	4.1	2,790	7.1	1.1	0.8%	15.6%
DRC	Tyre	30.4	1.20%	0.8	145	1.4	2,074	14.7	2.0	12.3%	13.2%
PC1	Utlilities	27.9	-0.40%	1.3	348	2.4	450	62.0	1.2	7.0%	4.1%
HDG	Utlilities	28.5	-0.20%	1.3	349	1.6	2,175	13.1	1.2	17.4%	12.9%
GEX	Utlilities	23.1	-0.90%	1.9	788	15.3	388	59.5	0.9	9.5%	4.1%
QTP	Utlilities	15.5	0.00%	0.6	-	0.1	1,360	11.4	1.3	1.2%	10.8%
REE	Utlilities	62.9	0.50%	0.9	1,031	2.1	5,354	11.7	1.2	49.0%	13.9%
ANV	Fishery	31.8	-1.40%	1.3	169	1.9	294	107.8	1.5	3.0%	1.5%
PTB	Fishery	64.2	0.00%	0.8	172	0.6	4,360	14.7	1.5	23.8%	10.6%
PVT	Logistics	25.4	-8.50%	0.9	330	1.8	3,005	8.5	0.9	12.7%	14.3%
VSC	Logistics	21.6	0.00%	1.4	230	2.3	927	23.3	0.9	1.4%	6.2%
HAH	Logistics	41.0	-0.40%	1.4	173	2.2	3,648	11.2	1.4	3.5%	12.1%
VTP	Logistics	77.5	2.00%	1.2	378	3.9	3,119	24.8	6.0	7.3%	25.6%
DBC	Retail	31.0	0.60%	1.4	301	10.4	103	300.0	1.6	4.5%	0.5%
FRT	Retail	145.2	3.70%	0.7	793	4.4	(2,537)	-57.2	11.5	36.1%	11.8%
QNS	Retail	49.8	0.60%	0.6	-	0.5	6,117	8.1	2.1	15.2%	27.3%
DPM	Fertilizer	34.4	-0.70%	1.3	540	2.5	1,327	26.0	1.2	9.0%	4.2%
TNG	Textile	21.9	-0.90%	1.0	100	0.8	1,917	11.4	1.3	20.5%	12.5%

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.

DISCLAIMER

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