

Vietnam Daily Review VN-INDEX CONTINUED TO FALL SHARPLY

Friday, April 19, 2024

MARKET TREND FOREACAST

| | Negative | Neutral | Positive |
|--------------------|----------|---------|----------|
| Day 22/4/2024 | | • | |
| Week 22/4-26/4/202 | • | | |
| Month 04/2024 | • | | |

STOCK MARKET

VN-Index continued to decrease by more than 18 points today and closed at 1,174.85 points. Market breadth tilted to the negative side with 18/18 sectors decreasing, of which the Construction and materials led the decline, followed by Financial Services, Real Estate,... Regarding foreign transactions, today they net bought on HSX and net sold on HNX. Today's down session had relatively large liquidity, and buying and selling forces showed signs of balance at the threshold of 1,175. In the coming sessions, the index may continue to trade around this threshold. In a bad case, the index may drop to the support level of 1,150.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on April 19, 2024, warrants fluctuated according to the decrease of the underlying stocks.

HIGHLIGHT

- VN-Index -18.16 points, closing at 1174.85 points. HNX-Index -5.40 points, closing at 220.8 points.
- Pulling the index up: BID (+0.36), MSB (+0.13), QCG (+0.08), TCM (+0.07), VCF (+0.06).
- Pulling the index down: VIC (-2.16), CTG (-1.42), FPT (-0.86), BCM (-0.66), GVR (-0.54).
- The matched trade value of VN-Index reached VND 22,434 billion, increased 31.96% compared to the previous session. The total transaction value reached VND 23,658 billion.
- The trading range is 24.97 points. The market had 137 gainers, 57 remaining unchanged, 348 losers.
- Foreign investors' net buying value: VND 679.77 billion on HOSE, including VNM (VND 93.57 billion), DIG (VND 90.77 billion), VND (VND 89.41 billion), HPG (VND 81.91 billion), VCI (VND 67.08 billion). Foreign investors were net sellers on HNX with the value of VND -43.45 billion.

BSC30, BSC50 PERFORMANCE

- BSC30 -1.75%. Positive stocks: BID (+0.52%).
- BSC50 -2.77%. Positive stocks: MSB (+1.89%), VTP (+1.61%), PHR (+1.47%).

Indices' performances

| | BSC30 | BSC50 | VN Index | VN30 Index |
|----------|--------|--------|----------|------------|
| 1 day | -1.75% | -2.77% | -1.52% | -1.38% |
| 1 week | -7.03% | -9.11% | -6.55% | -5.76% |
| 1 months | 1.34% | 0.33% | 1.71% | 2.14% |
| 3 months | 11.41% | 9.91% | 6.76% | 6.34% |

Overview of Vietnam stock market

| VNI | HNX | UPCOM |
|----------|--|---|
| 1,174.85 | 220.80 | 87.16 |
| -1.52% | -2.39% | -1.12% |
| 22,434 | 2,550 | 674 |
| 31.96% | 62.94% | 21.78% |
| 679.77 | -43.45 | 15.30 |
| | 1,174.85 -1.52% 22,434 31.96% | 1,174.85 220.80 -1.52% -2.39% 22,434 2,550 31.96% 62.94% |

Foreign transactions (Bil. VND)

| Top buy | Value | Top sell | Value |
|---------|-------|----------|--------|
| VNM | 93.57 | MWG | -97.90 |
| DIG | 90.77 | SHB | -76.69 |
| VND | 89.41 | VIC | -60.61 |
| HPG | 81.91 | HDB | -58.59 |
| VCI | 67.08 | VHM | -44.57 |

Overview of global stock markets

| | | %D | %W |
|-----------|--------|--------|--------|
| SPX | 5,011 | -0.22% | -3.61% |
| FTSE100 | 7,838 | -0.50% | -1.97% |
| Eurostoxx | 4,327 | -0.19% | -1.33% |
| Shanghai | 3,065 | -0.29% | 1.52% |
| Nikkei | 37,091 | -2.53% | -6.26% |

Source: Bloomberg

| | Close | % |
|-------------------|--------|-------|
| Commodities | | |
| Brent | 88 | 1.27% |
| Gold | 2,379 | 0.76% |
| Exchange rate | | |
| USD/VND | 25,473 | 0.13% |
| EUR/VND | 27,749 | 0.53% |
| JPY/VND | 169 | 1.20% |
| Interst rates | | |
| 10Y-Gov bond rate | 2.87% | 0.00% |
| 1M-interbank rate | 4.54% | |

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

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BSC Research Bloomberg: RESP BSCV Trang | 1



MARKET STATISTICS

Top 5 leaders on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|--------|-------|----------|--------------|
| BID | 48.10 | 0.52% | 0.36 | 2.17 |
| MSB | 13.20 | 1.89% | 0.13 | 10.24 |
| QCG | 16.70 | 6.89% | 0.08 | 3.47 |
| TCM | 41.35 | 6.89% | 0.07 | 1.41 |
| VCF | 215.80 | 3.80% | 0.06 | 0.00 |

Top 5 leaders on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| SZB | 39.20 | 9.69% | 0.50 | 0.18 |
| TKU | 16.00 | 10.00% | 0.33 | 0.00 |
| HTP | 13.60 | 5.15% | 0.27 | 1.08 |
| DHT | 26.70 | 2.25% | 0.20 | 0.18 |
| PGS | 29.00 | 3.10% | 0.18 | 0.01 |

Top 5 gainers on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|-------|----------|--------------|
| TCM | 41.35 | 6.89% | 0.07 | 1.41 |
| QCG | 16.70 | 6.89% | 0.08 | 3.47 |
| PSH | 4.69 | 6.82% | 0.01 | 1.14 |
| SCD | 12.20 | 6.56% | 0.00 | 0.00 |
| TTE | 10.00 | 6.50% | 0.00 | 0.00 |

Top 5 gainers on the HNX

| | Close | <u></u> % | Index pt | Volume (mil) |
|-----|-------|-----------|----------|--------------|
| CET | 6.00 | 10.00% | 0.02 | 0.03 |
| TKU | 16.00 | 10.00% | 0.33 | 0.00 |
| TTH | 4.00 | 10.00% | 0.07 | 1.09 |
| ATS | 9.10 | 9.89% | 0.01 | 0.00 |
| ARM | 26.70 | 9.74% | 0.04 | 0.00 |

Figure 1 HSX-Index Intraday

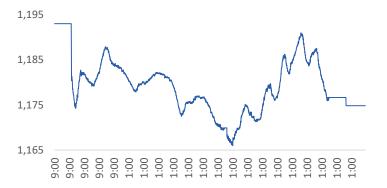
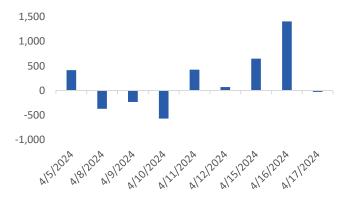


Figure 3
Proprietary trading



Top 5 laggards on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|--------|--------|----------|--------------|
| VIC | 45.00 | -5.33% | -2.16 | 3.76 |
| CTG | 32.70 | -3.36% | -1.42 | 13.14 |
| FPT | 111.80 | -2.50% | -0.86 | 7.85 |
| BCM | 54.30 | -4.97% | -0.66 | 1.15 |
| GVR | 28.65 | -1.92% | -0.54 | 5.88 |

Top 5 laggards on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| SHS | 18.60 | -6.45% | -3.62 | 44.93 |
| IDC | 54.50 | -4.95% | -3.36 | 3.37 |
| CEO | 19.00 | -6.84% | -2.47 | 14.57 |
| MBS | 27.00 | -5.19% | -2.30 | 8.30 |
| VIF | 16.90 | -8.28% | -1.78 | 0.00 |

Top 5 losers on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|--------|--------|----------|--------------|
| PGD | 37.20 | -6.99% | -0.06 | 0.03 |
| BMP | 113.20 | -6.98% | -0.15 | 0.81 |
| RDP | 5.17 | -6.96% | 0.00 | 0.73 |
| DXV | 5.61 | -6.95% | 0.00 | 0.01 |
| CRC | 6.33 | -6.95% | -0.01 | 0.27 |

Top 5 losers on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|---------|----------|--------------|
| HAT | 52.00 | -10.00% | -0.06 | 0.00 |
| VGS | 27.00 | -10.00% | -0.51 | 3.14 |
| NBW | 28.80 | -9.72% | -0.11 | 0.00 |
| HHC | 82.50 | -9.70% | -0.47 | 0.00 |
| LAS | 21.70 | -9.68% | -0.85 | 3.76 |

Figure 2 HNX-Index Intraday

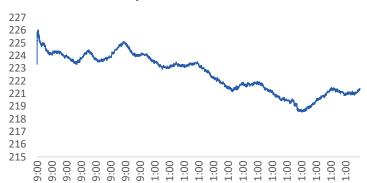
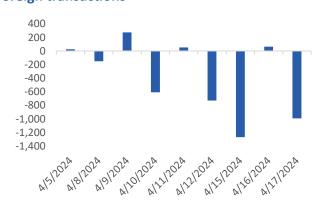


Figure 4
Foreign transactions



Source: FiinProX, BSC Research
Bloomberg: RESP BSCV
Source: FiinProX, BSC Research
Trang



Vietnam Daily Review VN-INDEX CONTINUED TO FALL SHARPLY

Friday, April 19, 2024

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 | 90.5 | 0.00% | 0.7 | 19,914 | 4.7 | 5,910 | 15.3 | 105,000 | 23.5% | <u>Link</u> |
| BID | Bank | 48.4 | 0.50% | 1.0 | 10,851 | 4.1 | 3,772 | 12.8 | 54,578 | 17.3% | <u>Link</u> |
| VPB | Bank | 18.1 | -0.30% | 1.0 | 5,654 | 10.9 | 1,257 | 14.4 | 23,685 | 28.0% | <u>Link</u> |
| ТСВ | Bank | 44.5 | -0.80% | 1.2 | 6,171 | 25.3 | 5,111 | 8.7 | - | 22.5% | <u>Link</u> |
| MBB | Bank | 22.7 | -1.70% | 1.1 | 4,725 | 25.2 | 3,966 | 5.7 | 24,400 | 23.2% | <u>Link</u> |
| STB | Bank | 26.8 | 0.00% | 1.0 | 1,989 | 24.3 | 4,094 | 6.5 | 31,200 | 22.5% | <u>Link</u> |
| CTG | Bank | 31.6 | -3.40% | 1.1 | 6,681 | 16.2 | 3,706 | 8.5 | 19,100 | 27.1% | <u>Link</u> |
| ACB | Bank | 26.6 | -0.60% | 0.9 | 4,068 | 11.4 | 4,131 | 6.4 | 42,500 | 30.0% | <u>Link</u> |
| SSI | Securities | 33.2 | -3.50% | 1.2 | 1,973 | 38.6 | 1,529 | 21.7 | 45,900 | 43.2% | <u>Link</u> |
| IDC | IP | 51.8 | -5.00% | 1.0 | 673 | 6.7 | 4,223 | 12.3 | - | 17.6% | <u>Link</u> |
| HPG | Material | 27.8 | -0.70% | 1.3 | 6,364 | 28.6 | 1,176 | 23.7 | 23,300 | 24.5% | <u>Link</u> |
| HSG | Material | 19.6 | -2.20% | 1.6 | 474 | 10.1 | 1,321 | 14.8 | 79,900 | 22.1% | <u>Link</u> |
| VHM | Real estate | 41.5 | -0.70% | 1.2 | 7,114 | 20.5 | 7,664 | 5.4 | 38,900 | 22.4% | <u>Link</u> |
| KDH | Real estate | 33.0 | -2.90% | 1.4 | 1,038 | 5.5 | 895 | 36.9 | 44,100 | 38.0% | <u>Link</u> |
| NLG | Real estate | 36.0 | -5.30% | 1.2 | 545 | 6.7 | 1,257 | 28.6 | 46,100 | 42.9% | <u>Link</u> |
| DGC | Chemicals | 108.0 | -2.80% | 1.6 | 1,615 | 13.3 | 8,163 | 13.2 | 85,000 | 18.9% | <u>Link</u> |
| DCM | Fertilizer | 30.5 | -2.40% | 1.4 | 636 | 3.6 | 2,095 | 14.6 | 41,000 | 10.9% | <u>Link</u> |
| GAS | O&G | 75.0 | -0.10% | 0.6 | 6,782 | 2.6 | 5,053 | 14.8 | 36,000 | 2.6% | <u>Link</u> |
| PVS | O&G | 38.4 | -0.50% | 0.7 | 723 | 15.5 | 2,148 | 17.9 | 110,500 | 20.8% | <u>Link</u> |
| PVD | O&G | 29.3 | -0.20% | 1.2 | 641 | 8.3 | 1,052 | 27.8 | 45,000 | 23.3% | <u>Link</u> |
| POW | Ultilities | 10.6 | -3.20% | 0.8 | 977 | 3.6 | 443 | 23.9 | 38,500 | 4.0% | <u>Link</u> |
| VHC | Fishery | 69.5 | -0.70% | 1.2 | 614 | 1.5 | 4,914 | 14.1 | 29,000 | 32.2% | <u>Link</u> |
| GMD | Logistics | 80.0 | -0.60% | 1.1 | 978 | 5.2 | 7,357 | 10.9 | 14,500 | 48.2% | <u>Link</u> |
| VNM | Retail | 64.2 | 0.00% | 0.7 | 5,282 | 11.4 | 4,246 | 15.1 | 81,700 | 53.9% | <u>Link</u> |
| MSN | Retail | 66.5 | -0.40% | 1.5 | 3,746 | 12.5 | 293 | 227.3 | 27,700 | 28.2% | <u>Link</u> |
| MWG | Retail | 48.2 | -2.40% | 1.6 | 2,775 | 18.0 | 115 | 420.4 | 63,800 | 44.5% | <u>Link</u> |
| PNJ | Retail | 91.5 | -1.10% | 0.7 | 1,205 | 6.1 | 6,010 | 15.2 | 83,500 | 49.0% | <u>Link</u> |
| DGW | Retail | 53.5 | -3.80% | 1.7 | 352 | 6.8 | 2,121 | 25.2 | 90,900 | 23.4% | <u>Link</u> |
| FPT | Technology | 109.0 | -2.50% | 0.8 | 5,450 | 23.0 | 5,091 | 21.4 | 57,000 | 49.0% | <u>Link</u> |
| CTR | Technology | 112.2 | -5.50% | 1.0 | 505 | 3.3 | 4,510 | 24.9 | 108,000 | 10.1% | <u>Link</u> |

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.



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Friday, April 19, 2024

BSC50 PORTFOLIO

| Stocks | Sectors | Close (1,000 | % Day | Beta | MC (Mil USD) | Liquidity (Mil USD) | EPS fw (VND) | P/E fw | P/B | Foreign ownershi- | ROE (%) |
|--------|--------------|---------------------|--------|------|-----------------|------------------------|-----------------|--------|------|----------------------|---------|
| HDB | Bank | VND) 22.2 | -3.30% | 0.8 | 2,551 | 8.3 | 3,482 | 6.4 | 1.4 | p 19.6% | 25.4% |
| VIB | Bank | 21.1 | -1.90% | 1.3 | 2,107 | 7.4 | 3,482 | 6.3 | 1.4 | 20.5% | 24.3% |
| TPB | Bank | 16.6 | -2.40% | 1.2 | 1,439 | 5.5 | 2,027 | 8.2 | 1.1 | 29.8% | 13.7% |
| MSB | Bank | 13.4 | 1.90% | 1.3 | 1,059 | 4.9 | 2,322 | 5.8 | 0.9 | 30.0% | 16.0% |
| EIB | Bank | 16.5 | -2.10% | 1.0 | 1,131 | 5.9 | 1,244 | 13.3 | 1.3 | 1.8% | 10.1% |
| HCM | Securities | 24.8 | -4.80% | 1.3 | 689 | 11.7 | 1,475 | 16.8 | 1.4 | 41.0% | 8.3% |
| VCI | Securities | 45.0 | -0.20% | 1.7 | 775 | 18.4 | 1,124 | 40.0 | 2.7 | 21.7% | 7.1% |
| VND | Securities | 18.9 | -2.30% | 1.5 | 906 | 16.5 | 1,660 | 11.4 | 1.4 | 22.6% | 13.1% |
| BID | Bank | 48.4 | 0.50% | 1.0 | 10,851 | 4.1 | 3,772 | 12.8 | 2.3 | 17.3% | 20.3% |
| SHS | Securities | 17.4 | -6.50% | 1.7 | 557 | 30.7 | 688 | 25.3 | 1.4 | 13.2% | 5.7% |
| LCG | Construction | 11.3 | 0.40% | 1.5 | 84 | 2.6 | 546 | 20.7 | 0.8 | 2.1% | 4.6% |
| HUT | Construction | 16.8 | -1.80% | 1.6 | 590 | 2.9 | 53 | 317.7 | 1.3 | 1.6% | 0.7% |
| CTD | Construction | 61.0 | -4.70% | 0.8 | 240 | 3.6 | 1,894 | 32.2 | 0.7 | 44.3% | 2.3% |
| HHV | Construction | 12.5 | -4.90% | 1.3 | 203 | 4.8 | 782 | 16.0 | 0.6 | 6.7% | 4.2% |
| C4G | Construction | 9.5 | -3.10% | 1.4 | - | 0.5 | 365 | 26.0 | 0.9 | 0.0% | 4.9% |
| DIG | IP | 27.4 | -4.90% | 1.7 | 658 | 42.0 | 195 | 140.7 | 2.1 | 5.2% | 2.1% |
| CEO | IP | 17.7 | -6.80% | 0.9 | 359 | 10.2 | 293 | 60.4 | 1.5 | 5.6% | 2.4% |
| КВС | IP | 28.0 | -5.10% | 1.5 | 846 | 9.9 | 2,646 | 10.6 | 1.1 | 20.8% | 11.7% |
| VGC | IP | 49.2 | -3.90% | 1.3 | 868 | 1.7 | 2,717 | 18.1 | 2.3 | 5.4% | 12.5% |
| SZC | IP | 39.2 | 0.10% | 1.4 | 278 | 2.8 | 1,515 | 25.9 | 2.4 | 3.2% | 13.4% |
| SIP | IP | 76.5 | -1.40% | 1.4 | 548 | 0.8 | 5,098 | 15.0 | 3.5 | 0.3% | 26.9% |
| PHR | IP | 55.1 | 1.50% | 1.1 | 294 | 1.2 | 4,574 | 12.0 | 2.0 | 15.8% | 18.3% |
| GVR | IP | 28.1 | -1.90% | 1.5 | 4,425 | 6.5 | 656 | 42.8 | 2.0 | 0.3% | 6.2% |
| NKG | Material | 22.0 | -4.60% | 1.6 | 228 | 10.5 | 446 | 49.2 | 1.1 | 16.0% | 2.3% |
| ВМР | Chemicals | 105.3 | -7.00% | 0.5 | 339 | 3.4 | 12,717 | 8.3 | 3.2 | 85.9% | 39.1% |
| IJC | Real estate | 13.6 | 0.00% | 1.7 | 202 | 1.6 | 1,477 | 9.2 | 0.9 | 5.9% | 10.3% |
| DXG | Real estate | 15.6 | -6.60% | 1.7 | 443 | 12.2 | 239 | 65.4 | 0.8 | 20.0% | 1.1% |
| VRE | Real estate | 21.3 | -3.20% | 1.2 | 1,906 | 7.2 | 1,940 | 11.0 | 1.3 | 31.0% | 12.4% |
| PDR | Real estate | 26.2 | -6.40% | 1.8 | 762 | 16.7 | 926 | 28.3 | 2.0 | 7.4% | 7.2% |
| CSV | Chemicals | 53.5 | -6.10% | 1.5 | 93 | 1.9 | 4,732 | 11.3 | 1.6 | 3.7% | 16.1% |
| DHC | Chemicals | 38.0 | -1.60% | 1.0 | 120 | 0.6 | 3,843 | 9.9 | 1.7 | 35.8% | 17.2% |
| PLX | O&G | 34.6 | -1.80% | 0.9 | 1,733 | 0.7 | 2,230 | 15.5 | 1.5 | 17.1% | 10.7% |
| PLC | O&G | 26.8 | -6.00% | 1.4 | 85 | 0.4 | 1,261 | 21.2 | 1.6 | 1.2% | 8.4% |
| BSR | O&G | 18.0 | -3.20% | 1.2 | - | 6.7 | 2,790 | 6.5 | 1.0 | 0.8% | 15.6% |
| DRC | Tyre | 29.0 | -1.20% | 0.7 | 136 | 1.5 | 2,286 | 12.7 | 1.8 | 13.6% | 13.2% |
| PC1 | Ultilities | 24.8 | -4.20% | 1.3 | 304 | 4.1 | 450 | 55.2 | 1.1 | 8.5% | 4.1% |
| HDG | Ultilities | 25.2 | -3.10% | 1.3 | 303 | 2.4 | 2,175 | 11.6 | 1.1 | 22.8% | 12.9% |
| GEX | Ultilities | 19.7 | -1.50% | 1.9 | 660 | 16.2 | 388 | 50.8 | 0.8 | 12.6% | 4.1% |
| QTP | Ultilities | 15.2 | -1.30% | 0.7 | - | 0.4 | 1,360 | 11.2 | 1.3 | 1.2% | 10.8% |
| REE | Ultilities | 58.0 | -3.30% | 0.9 | 933 | 3.6 | 5,354 | 10.8 | 1.1 | 49.0% | 13.9% |
| ANV | Fishery | 28.8 | -2.50% | 1.3 | 151 | 1.7 | 294 | 97.8 | 1.3 | 3.0% | 1.5% |
| PTB | Fishery | 62.0 | 1.30% | 0.8 | 163 | 0.8 | 3,851 | 16.1 | 1.5 | 20.9% | 10.6% |
| PVT | Logistics | 24.2 | -2.00% | 0.8 | 339 | 2.8 | 3,005 | 8.1 | 0.9 | 12.3% | 14.3% |
| VSC | Logistics | 19.4 | -3.00% | 1.3 | 204 | 2.6 | 927 | 20.9 | 0.8 | 2.5% | 6.2% |
| НАН | Logistics | 38.0 | -0.80% | 1.4 | 158 | 3.3 | 3,648 | 10.4 | 1.3 | 3.9% | 12.1% |
| VTP | Logistics | 69.3 | 1.60% | 1.2 | 332 | 5.0 | 3,119 | 22.2 | 5.3 | 9.4% | 25.6% |
| DBC | Retail | 26.0 | -6.00% | 1.4 | 248 | 10.4 | 103 | 251.6 | 1.3 | 4.5% | 0.5% |
| FRT | Retail | 141.0 | 0.00% | 0.7 | 756 | 2.7 | (2,537) | -55.6 | 11.2 | 36.2% | 11.8% |
| QNS | Retail | 45.5 | -1.10% | 0.7 | - | 1.4 | 6,117 | 7.4 | 1.9 | 15.5% | 27.3% |
| DPM | Fertilizer | 31.2 | -4.00% | 1.2 | 481 | 3.6 | 1,327 | 23.5 | 1.1 | 10.0% | 4.2% |
| TNG | Textile | 19.7 | -1.50% | 0.9 | 88 | 1.5 | 1,917 | 10.3 | 1.2 | 18.6% | 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.



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Friday, April 19, 2024

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