

STOCK MARKET

Opening with a large negative gap, VN-Index traded below 1,220 before falling all the way down and closing at 1,188.07 points, down nearly 50 points today. Market breadth tilted to the negative side with 18/18 sectors losing points, of which the Chemical led the decline, followed by the Construction and Materials, Tourism and Entertainment, etc. Regarding foreign investors, today they net sold on both the HSX and HNX. In the coming trading sessions, the market may continue to fall to the 1,160 - 1,165 zone. Investors should trade cautiously in coming sessions.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 05/08/2024, warrants fluctuated according to the downtrend of the underlying stocks.

BSC30, BSC50 PERFORMANCE

- VN-Index **-48.53** points, closing at **1188.07** points. HNX-Index **-8.85** points, closing at **222.71** points.
- Pulling the index up: **HNA (+0.06)**, **SVC (+0.03)**, **EIB (+0.02)**, **BSI (+0.01)**, **SRC (+0.01)**.
- Pulling the index down: **VCB (-2.50)**, **BID (-2.31)**, **GVR (-2.12)**, **TCB (-2.04)**, **HPG (-2.01)**.
- The matched trade value of VN-Index reached **VND 21,217 billion**, increased **35.58%** compared to the previous session. The total transaction value reached VND 23,741 billion.
- The trading range is 36.46 points. The market had **24** gainers, 25 remaining unchanged, **448** losers.
- Foreign investors' net selling value: **VND -737.74 billion** on HOSE, including **HPG (VND -231.97 billion)**, **FPT (VND -88.86 billion)**, **MWG (VND -80.75 billion)**, **STB (VND -78.90 billion)**, **SSI (VND -70.74 billion)**. Foreign investors were net sellers on HNX with the value of **VND -11.15 billion**.

BSC30, BSC50 PERFORMANCE

- BSC30 **-3.15%**. Positive stocks: **POW (+1.14%)**.
- BSC50 **-4.18%**. Positive stocks: **BSI (+7.44%)**, **DBC (+2.86%)**, **EIB (+0.56%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-3.15%	-4.18%	-3.92%	-3.82%
1 week	-2.43%	-4.68%	-0.80%	-0.37%
1 months	-0.68%	0.24%	-0.64%	-1.05%
3 months	2.33%	0.66%	0.91%	1.72%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,188.07	222.71	90.79
% 1D	-3.92%	-3.82%	-3.18%
TV (bil VND)	21,217	1,532	1,005
%1D	35.58%	46.22%	10.95%
Foreign (bil VND)	-737.74	-11.15	-7.58

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VNM	191.91	HPG	-231.97
VCB	94.07	FPT	-88.86
HVN	62.74	MWG	-80.75
MSN	48.33	STB	-78.90
BCM	26.10	SSI	-70.74

Overview of global stock markets

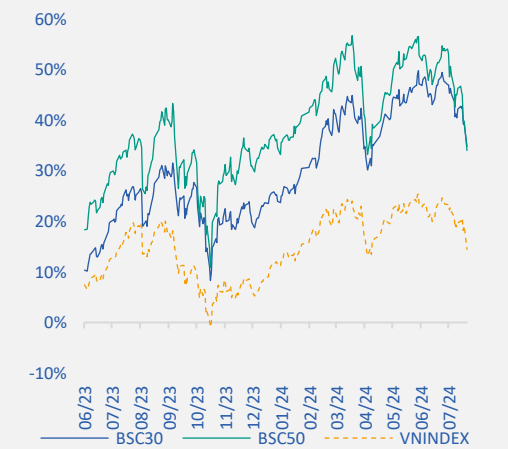
		%D	%W
SPX	5,347	-1.84%	-2.06%
FTSE100	7,991	-2.25%	-3.63%
Eurostoxx	4,531	-2.48%	-5.95%
Shanghai	2,861	-1.54%	-1.08%
Nikkei	31,078	-13.47%	-19.31%

Source: Bloomberg

	Close	%
Commodities		
Brent	76	-0.76%
Gold	2,470	1.83%
Exchange rate		
USD/VND	25,300	-0.32%
EUR/VND	28,197	0.53%
JPY/VND	172	1.81%
Interest rates		
10Y-Gov bond rate	0.00%	-2.90%
1M-interbank rate	4.66%	

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)
HNA	27.10	3.83%	0.06	0.24
SVC	27.55	6.37%	0.03	0.07
EIB	18.10	0.28%	0.02	1.74
BSI	43.30	0.46%	0.01	0.22
SRC	32.50	4.84%	0.01	0.03

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	57.70	9.90%	0.85	0.20
VIT	17.90	4.68%	0.03	0.05
CMS	19.20	7.26%	0.03	0.03
GDW	32.70	9.36%	0.02	0.01
MAC	21.90	7.88%	0.02	0.02

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
COM	28.90	6.64%	0.01	0.00
SVC	27.55	6.37%	0.03	0.00
SRC	32.50	4.84%	0.01	0.00
TNC	38.60	4.32%	0.01	0.00
NAV	18.15	4.31%	0.00	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
GDW	57.70	9.90%	4.48	0.33
MAC	32.70	9.36%	0.11	0.00
CMS	21.90	7.88%	0.10	0.03
SDU	19.20	7.26%	0.14	0.91
HKT	17.80	7.23%	0.10	0.00

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VCB	86.90	-2.03%	-2.50	5.59
BID	46.10	-3.46%	-2.31	5.70
GVR	30.10	-6.96%	-2.12	4.00
TCB	22.30	-5.11%	-2.04	7.05
HPG	25.95	-4.77%	-2.01	6.40

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
PVS	37.80	-5.50%	-0.74	0.48
SHS	14.10	-8.44%	-0.72	0.81
MBS	28.10	-5.07%	-0.46	0.44
CEO	13.40	-8.84%	-0.45	0.51
VCS	62.20	-5.76%	-0.42	0.16

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
CCL	37.20	-7.00%	-0.02	0.03
TMT	9.04	-7.00%	-0.01	0.01
VSC	17.95	-6.99%	-0.08	4.02
HVH	8.78	-6.99%	-0.01	0.81
APH	8.65	-6.99%	-0.04	2.97

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
VCM	14.60	-9.88%	-0.02	0.00
IPA	12.80	-9.86%	-1.06	0.19
SCI	9.20	-9.80%	-0.09	0.12
CKV	13.90	-9.74%	-0.02	0.00
MCO	13.90	-9.74%	-0.02	0.03

Figure 1
HSX-Index Intraday

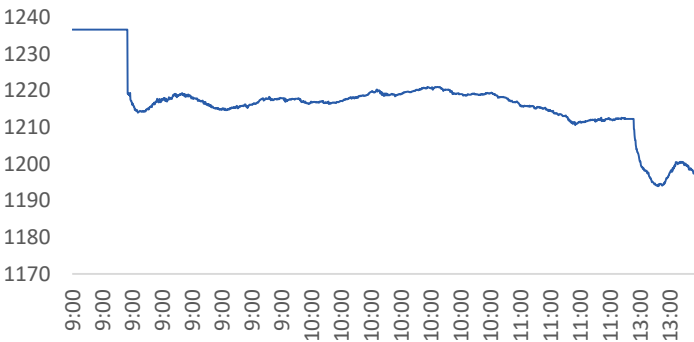


Figure 2
HNX-Index Intraday

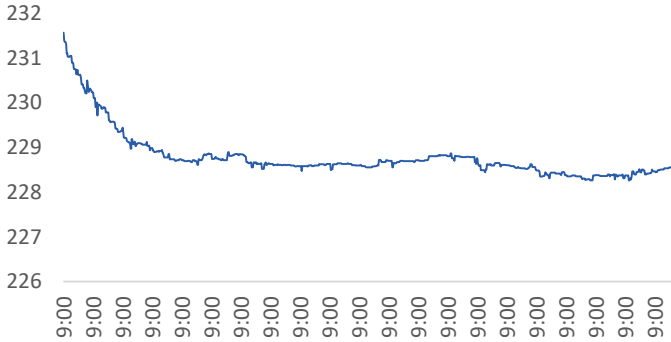


Figure 3
Proprietary trading

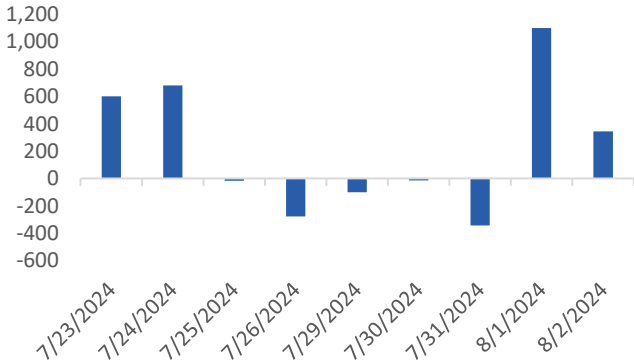
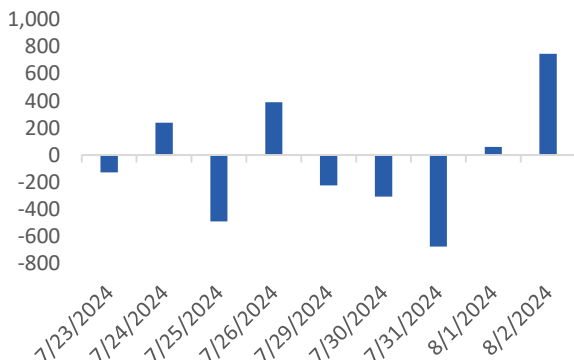


Figure 4
Foreign transactions



Source: FiinProX, BSC Research

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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 ownersh- p	Link
VCB	Bank	86.9	-2.00%	0.6	19,262	10.5	5,962	14.6	105,000	23.2%	Link
BID	Bank	46.1	-3.50%	1.1	10,422	5.0	4,006	11.5	54,578	17.2%	Link
VPB	Bank	18.2	-3.20%	1.0	5,711	20.6	1,460	12.4	23,685	26.7%	Link
TCB	Bank	22.3	-5.10%	1.1	6,231	14.9	3,047	7.3	-	21.8%	Link
MBB	Bank	23.0	-3.60%	1.0	4,830	28.4	4,018	5.7	24,400	23.2%	Link
STB	Bank	27.2	-4.20%	1.1	2,034	22.7	4,340	6.3	31,200	23.2%	Link
CTG	Bank	30.2	-4.40%	1.3	6,421	12.7	3,782	8.0	19,100	26.1%	Link
ACB	Bank	23.2	-3.10%	0.8	4,110	18.5	3,676	6.3	42,500	30.0%	Link
SSI	Broker	29.6	-5.30%	1.2	1,772	25.9	1,882	15.7	45,900	42.6%	Link
IDC	IP	56.8	-2.70%	1.2	743	4.6	5,573	10.2	-	24.1%	Link
HPG	Material	26.0	-4.80%	1.2	6,583	46.9	1,746	14.9	23,300	24.4%	Link
HSG	Material	20.0	-6.80%	1.7	489	11.4	1,844	10.8	79,900	20.4%	Link
VHM	RE	34.5	-4.20%	1.0	5,958	13.6	5,326	6.5	38,900	15.7%	Link
KDH	RE	34.5	-1.40%	1.4	1,244	3.2	765	45.1	44,100	39.6%	Link
NLG	RE	37.8	-4.30%	1.3	577	3.8	1,102	34.3	46,100	49.4%	Link
DGC	Chemicals	101.2	-5.50%	1.5	1,524	13.4	7,849	12.9	85,000	18.9%	Link
DCM	Fertilizer	34.5	-6.40%	1.3	724	7.5	2,798	12.3	41,000	8.5%	Link
GAS	O&G	76.5	-3.00%	0.6	6,968	6.4	4,760	16.1	36,000	1.9%	Link
PVS	O&G	37.8	-5.50%	1.1	716	10.5	1,931	19.6	110,500	21.6%	Link
PVD	O&G	26.0	-7.00%	1.3	572	7.8	1,150	22.6	45,000	16.2%	Link
POW	Utilities	13.3	-3.60%	0.7	1,235	6.3	467	28.5	38,500	4.0%	Link
VHC	Fishery	67.0	-4.70%	1.2	596	2.7	3,216	20.8	29,000	29.6%	Link
GMD	Logistics	75.6	-6.70%	0.9	931	3.3	3,966	19.1	14,500	48.1%	Link
VNM	Retail	69.4	-2.90%	0.6	5,752	33.5	4,633	15.0	81,700	50.1%	Link
MSN	Retail	70.5	-2.40%	1.2	4,230	17.5	466	151.2	27,700	28.5%	Link
MWG	Retail	61.6	-2.10%	1.4	3,571	28.3	1,507	40.9	63,800	46.8%	Link
PNJ	Retail	95.2	-3.80%	0.9	1,263	7.3	6,133	15.5	83,500	49.0%	Link
DGW	Retail	54.3	-6.10%	1.7	360	5.4	2,237	24.3	90,900	24.4%	Link
FPT	Tech	118.6	-3.70%	1.0	6,869	49.0	4,889	24.3	57,000	45.2%	Link
CTR	Tech	115.6	-6.80%	1.4	524	2.7	4,590	25.2	108,000	10.4%	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 ownership	ROE (%)
HDB	Bank	24.5	-6.10%	0.9	2,830	9.9	4,137	5.9	1.5	18.2%	25.4%
VIB	Bank	20.2	-4.00%	1.1	2,037	5.6	3,048	6.6	1.3	20.5%	24.3%
TPB	Bank	16.8	-5.40%	1.2	1,467	11.9	2,154	7.8	1.0	28.4%	13.7%
MSB	Bank	13.6	-6.20%	1.1	1,079	6.4	2,366	5.7	0.8	29.4%	16.0%
EIB	Bank	18.1	0.30%	1.0	1,250	5.8	1,273	14.2	1.3	2.9%	10.1%
HCM	Broker	23.0	-6.30%	1.7	642	8.5	1,397	16.5	1.5	45.1%	8.3%
VCI	Broker	40.8	-6.00%	1.7	715	8.3	1,763	23.1	2.0	19.2%	7.1%
VND	Broker	14.2	-6.90%	1.5	857	9.3	1,591	8.9	1.3	12.6%	13.1%
BSI	Broker	43.3	0.50%	1.8	383	2.4	2,165	20.0	1.8	39.9%	9.0%
SHS	Broker	14.1	-8.40%	1.7	455	8.0	1,338	10.5	1.0	9.0%	5.7%
CTD	Const	59.3	-6.90%	1.3	235	4.0	2,996	19.8	0.7	47.1%	2.3%
HHV	Const	10.0	-7.00%	1.5	171	2.7	860	11.6	0.5	8.2%	4.2%
LCG	Const	9.7	-7.00%	1.6	74	1.1	771	12.6	0.7	2.3%	4.6%
SZC	IP	34.2	-6.90%	1.2	244	2.2	1,549	22.1	2.1	3.1%	13.4%
SIP	IP	68.6	-6.90%	1.4	569	2.0	5,925	11.6	3.2	1.6%	26.9%
PHR	IP	53.7	-3.20%	1.1	289	0.3	3,028	17.7	1.9	18.4%	18.3%
DIG	RE	22.6	-5.60%	1.7	545	17.4	152	148.7	1.8	4.2%	2.1%
CEO	RE	13.4	-8.80%	1.3	287	5.3	312	43.0	1.2	4.8%	2.4%
KBC	IP	24.4	-6.20%	1.5	741	4.7	295	82.7	1.0	20.4%	11.7%
VGC	IP	40.7	-7.00%	1.2	724	1.8	1,776	22.9	2.2	5.1%	12.5%
GVR	IP	30.1	-7.00%	1.6	4,775	5.0	704	42.8	2.4	0.5%	6.2%
NKG	Material	20.3	-6.90%	1.7	212	7.3	1,580	12.9	0.9	15.4%	2.3%
BMP	Material	91.0	-5.00%	1.1	295	0.8	11,420	8.0	2.8	83.3%	39.1%
IJC	RE	13.4	-6.00%	1.5	200	2.6	683	19.5	1.0	4.6%	10.3%
DXG	RE	12.2	-6.90%	1.5	349	5.5	249	49.0	0.8	17.8%	1.1%
VRE	RE	16.8	-6.40%	1.2	1,514	9.1	1,975	8.5	1.0	22.9%	12.4%
PDR	RE	17.0	-5.60%	1.6	589	7.6	557	30.5	1.4	8.0%	7.2%
DIG	RE	22.6	-5.60%	1.7	545	17.4	152	148.7	1.8	4.2%	2.1%
HUT	Const	16.4	-1.80%	1.2	580	2.2	73	224.5	1.5	1.5%	0.7%
C4G	Const	8.6	-5.50%	1.3	-	0.3	507	17.0	0.8	0.0%	4.9%
CSV	Chemicals	35.5	-6.90%	1.8	156	1.6	4,797	7.4	1.0	5.3%	16.1%
DHC	Chemicals	37.2	-2.50%	1.2	119	0.6	3,067	12.1	1.6	39.8%	17.2%
DRC	Tyre	31.8	-6.00%	0.8	150	1.1	2,510	12.7	2.0	11.9%	13.2%
PC1	Utilities	26.6	-6.80%	1.4	328	8.1	892	29.8	1.5	12.1%	4.1%
HDG	Utilities	25.6	-6.90%	1.4	341	6.4	1,989	12.8	1.4	15.6%	12.9%
GEX	Utilities	20.3	-5.60%	1.7	686	10.3	1,245	16.3	1.3	8.8%	4.1%
QTP	Utilities	14.3	-4.00%	0.6	-	0.2	1,354	10.6	1.2	1.3%	10.8%
PLX	O&G	45.5	-4.20%	1.0	2,293	4.2	2,874	15.8	2.3	17.8%	10.7%
BSR	O&G	21.7	-3.10%	1.2	-	10.3	2,588	8.4	1.2	0.7%	15.6%
PLC	O&G	24.0	-5.50%	1.5	77	0.3	728	33.0	1.6	0.3%	8.4%
ANV	Fishery	30.2	-6.90%	1.5	159	2.4	262	114.9	1.4	1.1%	1.5%
PTB	Material	59.8	-6.60%	0.7	159	0.3	4,903	12.2	1.4	25.0%	10.6%
VSC	Logistics	18.0	-7.00%	1.5	190	2.9	532	33.7	1.6	2.5%	6.2%
HAH	Logistics	37.8	-4.30%	1.3	182	6.4	2,791	13.5	1.6	9.0%	12.1%
VTP	Logistics	69.5	-4.70%	1.6	336	2.8	2,980	23.3	5.2	6.9%	25.6%
DBC	Retail	27.0	-3.70%	1.7	346	8.9	979	27.6	1.3	11.9%	0.5%
FRT	Retail	162.5	-4.40%	0.8	878	4.7	(414)	-392.2	12.9	36.0%	11.8%
QNS	Retail	46.9	-3.50%	0.6	-	2.0	6,737	7.0	1.9	15.0%	27.3%
TNG	Textile	24.0	-4.40%	1.2	117	3.0	2,240	10.7	1.5	19.1%	12.5%
PVT	Logistics	26.5	-6.20%	1.1	374	3.7	2,802	9.5	1.3	14.0%	14.3%
DPM	Fertilizer	32.7	-6.60%	1.3	508	4.3	1,703	19.2	1.1	8.1%	4.2%
REE	Utilities	65.4	-7.00%	1.0	1,222	3.0	3,806	17.2	1.7	49.0%	13.9%

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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