

MARKET TREND FORECAST

	Negative	Neutral	Positive
Day 28/6/2024		●	
Week 24/6-28/6/202		●	
Month 06/2024		●	

STOCK MARKET

The market traded in the 1,250 - 1,260 range all day today before closing at 1,259.09 points, down 2 points compared to yesterday. Market breadth tilted to the negative side with 12/18 sectors decreasing, of which the Oil and Gas led the decline. Besides, Banking and Financial Services also had negative trading sessions. On the contrary, the Insurance and Retail had positive sessions. Regarding foreign investors, today they net sold more than 1,000 billion VND on the HSX. The market still has many risks, so investors should trade carefully.

FUTURES CONTRACTS

Futures contracts decreased according to the movement of VN30, except for VN30F2408.

COVERED WARRANTS

During the trading session on 27/06/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

BSC30, BSC50 PERFORMANCE

- VN-Index **-2.15** points, closing at **1259.09** points. HNX-Index **+0.39** points, closing at **240.07** points.
- Pulling the index up: **FPT (+0.37)**, **MWG (+0.29)**, **BVH (+0.24)**, **SAB (+0.19)**, **HDB (+0.18)**.
- Pulling the index down: **BID (-0.56)**, **TCB (-0.47)**, **PLX (-0.34)**, **POW (-0.31)**, **VRE (-0.22)**.
- The matched trade value of VN-Index reached VND **12,284** billion, decreased **-20.05%** compared to the previous session. The total transaction value reached VND 15,147 billion.
- The trading range is 7.37 points. The market had **175** gainers, 93 remaining unchanged, **214** losers.
- Foreign investors' net selling value: **VND -1143.41 billion on HOSE**, including **FUEVFNVD (VND -792.20 billion)**, **FPT (VND -101.05 billion)**, **TCB (VND -74.86 billion)**, **POW (VND -59.01 billion)**, **VPB (VND -54.29 billion)**. Foreign investors were net sellers on HNX with the value of VND **-16.00** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.22%**. Positive stocks: **DCM (+1.63%)**, **KDH (+1.35%)**, **MWG (+1.28%)**.
- BSC50 **-0.31%**. Positive stocks: **DIG (+3.42%)**, **DIG (+3.42%)**, **MSB (+1.75%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.22%	-0.31%	-0.17%	-0.18%
1 week	-2.31%	-2.04%	-1.64%	-2.35%
1 months	-2.46%	-2.38%	-1.48%	-0.86%
3 months	5.24%	2.04%	2.62%	5.22%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,259.09	240.07	98.53
% 1D	-0.17%	0.16%	-0.37%
TV (bil VND)	12,284	958	962
%1D	-20.05%	-3.63%	-1.86%
Foreign (bil VND)	-1143.41	-16.00	-17.39

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MWG	105.62	FUEVFNVD	-792.20
PC1	52.01	FPT	-101.05
KDH	42.72	TCB	-74.86
DGC	28.47	POW	-59.01
HPG	26.89	VPB	-54.29

Overview of global stock markets

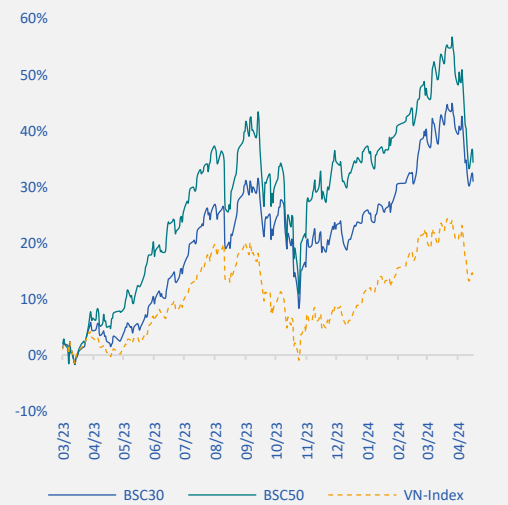
		%D	%W
SPX	5,478	0.16%	-0.17%
FTSE100	8,218	-0.09%	-0.66%
Eurostoxx	4,923	0.06%	-0.45%
Shanghai	2,946	-0.90%	-1.98%
Nikkei	39,305	-1.00%	1.70%

Source: Bloomberg

	Close	%
Commodities		
Brent	84	-0.11%
Gold	2,311	0.51%
Exchange rate		
USD/VND	25,477	0.03%
EUR/VND	27,881	-0.27%
JPY/VND	162	-0.61%
Interst rates		
10Y-Gov bond rate	2.81%	-0.01%
1M-interbank rate	4.54%	

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)
FPT	132.80	0.76%	0.37	1.46
MWG	63.40	1.28%	0.29	1.46
BVH	46.00	2.79%	0.24	0.74
SAB	60.60	1.00%	0.19	1.28
HDB	22.95	1.10%	0.18	2.91

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
VIF	20.70	7.25%	0.38	0.35
NVB	10.40	7.22%	0.30	0.56
HHC	107.90	7.90%	0.10	0.02
CEO	17.10	1.18%	0.07	0.51
PVI	57.50	0.70%	0.07	0.23

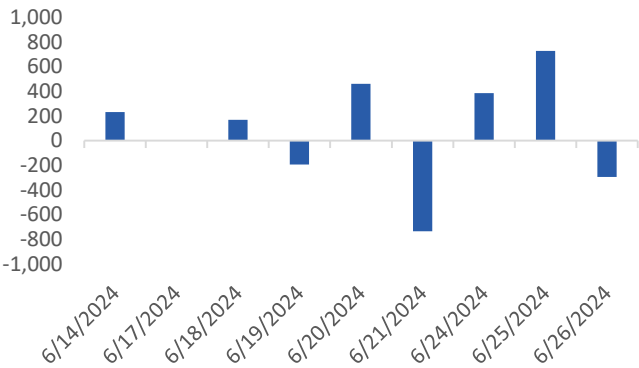
Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
HID	3.29	6.99%	0.00	1.08
HTL	17.90	6.98%	0.00	0.04
TDC	8.92	6.95%	0.02	1.32
DXV	5.35	6.92%	0.00	0.03
VNG	9.15	6.89%	0.02	0.10

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
GDW	17.20	9.88%	0.11	0.11
VIT	30.20	9.60%	0.11	0.00
CAG	18.00	9.44%	0.35	0.03
VE1	8.70	9.20%	0.05	0.08
HHC	3.30	9.09%	0.01	0.03

Figure 1
Proprietary trading



Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
BID	44.10	-0.90%	-0.56	5.70
TCB	23.45	-2.29%	-0.47	3.52
PLX	41.30	-2.59%	-0.34	1.27
POW	14.75	-3.59%	-0.31	2.34
VRE	20.40	-1.92%	-0.22	2.27

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
DTK	13.90	-7.95%	-0.54	0.68
MBS	31.30	-2.19%	-0.22	0.44
PVS	41.20	-1.20%	-0.17	0.48
PTI	32.50	-4.13%	-0.08	0.08
MVB	20.70	-3.72%	-0.06	0.11

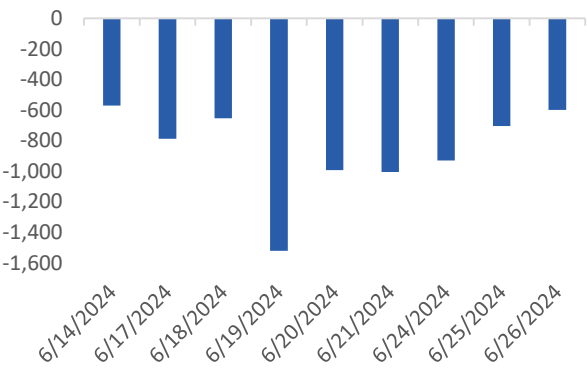
Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
BTT	36.00	-6.94%	-0.01	0.00
TNC	42.60	-6.92%	-0.01	0.02
EVG	7.80	-6.92%	-0.03	8.31
VIP	14.40	-5.56%	-0.01	0.71
NVT	10.90	-5.50%	-0.01	0.03

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
THS	17.60	-9.66%	-0.02	0.00
PJC	29.70	-9.43%	-0.07	0.00
CTT	17.10	-9.36%	-0.03	0.01
SDA	7.50	-9.33%	-0.06	0.74
GMX	19.90	-9.05%	-0.06	0.00

Figure 2
Foreign transactions



Source: FiinProX, BSC Research

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 ownersh- p	Link
VCB	Bank	85.2	0.00%	0.6	18,707	4.8	5,838	14.6	105,000	23.5%	Link
BID	Bank	44.1	-0.90%	1.0	9,876	2.7	3,841	11.5	54,578	17.3%	Link
VPB	Bank	19.0	0.00%	1.0	5,922	18.7	1,397	13.6	23,685	28.0%	Link
TCB	Bank	23.4	-2.30%	1.1	6,490	11.4	5,600	4.2	-	22.5%	Link
MBB	Bank	22.5	0.00%	1.0	4,690	5.5	3,818	5.9	24,400	23.2%	Link
STB	Bank	29.2	-1.00%	1.0	2,163	7.4	4,206	6.9	31,200	22.5%	Link
CTG	Bank	31.3	0.00%	1.2	6,603	5.0	3,751	8.3	19,100	27.1%	Link
ACB	Bank	24.0	-0.60%	0.8	4,203	4.6	4,072	5.9	42,500	30.0%	Link
SSI	Securities	34.3	-0.30%	1.2	2,034	7.2	1,704	20.1	45,900	43.2%	Link
IDC	IP	60.6	0.00%	1.2	786	4.0	5,880	10.3	-	17.6%	Link
HPG	Material	28.8	-0.20%	1.2	7,249	11.4	1,601	18.0	23,300	24.5%	Link
HSG	Material	24.8	-0.80%	1.7	601	10.9	1,423	17.5	79,900	22.1%	Link
VHM	Real estate	37.6	0.30%	1.1	6,432	5.1	5,074	7.4	38,900	22.4%	Link
KDH	Real estate	37.5	1.40%	1.4	1,178	3.4	726	51.7	44,100	38.0%	Link
NLG	Real estate	42.0	1.00%	1.5	635	2.7	1,040	40.4	46,100	42.9%	Link
DGC	Chemicals	123.8	-1.00%	1.4	1,847	8.2	7,845	15.8	85,000	18.9%	Link
DCM	Fertilizer	37.4	1.60%	1.3	778	8.0	2,313	16.2	41,000	10.9%	Link
GAS	O&G	76.5	0.00%	0.6	6,902	3.0	4,688	16.3	36,000	2.6%	Link
PVS	O&G	41.7	0.00%	1.0	783	5.1	1,992	20.9	110,500	20.8%	Link
PVD	O&G	29.8	0.00%	1.2	650	1.5	1,200	24.8	45,000	23.3%	Link
POW	Utilities	14.8	-3.60%	0.8	1,357	8.7	350	42.2	38,500	4.0%	Link
VHC	Fishery	71.9	-0.30%	1.2	634	2.2	3,774	19.0	29,000	32.2%	Link
GMD	Logistics	83.4	-0.70%	0.9	1,017	3.2	8,430	9.9	14,500	48.2%	Link
VNM	Retail	65.3	0.20%	0.6	5,361	6.9	4,408	14.8	81,700	53.9%	Link
MSN	Retail	74.5	0.70%	1.3	4,428	11.0	215	345.9	27,700	28.2%	Link
MWG	Retail	63.4	1.30%	1.4	3,642	20.7	717	88.4	63,800	44.5%	Link
PNJ	Retail	95.5	-0.60%	1.0	1,255	3.9	5,860	16.3	83,500	49.0%	Link
DGW	Retail	61.8	-0.20%	1.8	406	1.6	2,200	28.1	90,900	23.4%	Link
FPT	Technology	132.8	0.80%	0.9	7,619	33.4	5,335	24.9	57,000	49.0%	Link
CTR	Technology	148.2	-0.90%	1.1	666	0.9	4,582	32.3	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 ownershi- p	ROE (%)
HDB	Bank	23.0	1.10%	0.9	2,626	8.0	3,809	6.0	1.5	19.6%	25.4%
VIB	Bank	21.2	-0.50%	1.1	2,108	2.5	3,315	6.4	1.4	20.5%	24.3%
TPB	Bank	17.4	-0.60%	1.2	1,509	2.0	2,050	8.5	1.1	29.8%	13.7%
MSB	Bank	14.5	1.80%	1.2	1,139	3.1	2,310	6.3	0.9	30.0%	16.0%
EIB	Bank	18.4	0.50%	1.0	1,255	2.0	1,147	16.0	1.4	1.8%	10.1%
HCM	Securities	26.6	0.00%	1.6	737	3.2	1,175	22.7	2.2	41.0%	8.3%
VCI	Securities	46.0	-0.80%	1.7	798	3.3	1,409	32.6	2.5	21.7%	7.1%
VND	Securities	16.4	-1.80%	1.5	981	5.0	2,057	8.0	1.2	22.6%	13.1%
BID	Bank	44.1	-0.90%	1.0	9,876	2.7	3,841	11.5	2.1	17.3%	20.3%
SHS	Securities	17.5	0.00%	1.7	559	5.0	1,076	16.3	1.3	13.2%	5.7%
LCG	Construction	11.2	0.00%	1.6	85	0.4	655	17.2	0.8	2.1%	4.6%
HUT	Construction	17.0	0.00%	1.4	596	0.8	73	232.7	1.5	1.6%	0.7%
CTD	Construction	72.7	-0.50%	1.2	285	1.5	2,709	26.8	0.9	44.3%	2.3%
HHV	Construction	12.6	0.40%	1.5	203	0.8	833	15.1	0.6	6.7%	4.2%
C4G	Construction	10.1	0.00%	1.4	142	0.6	433	23.3	1.0	0.0%	4.9%
DIG	IP	27.2	3.40%	1.9	653	14.6	(38)	-709.8	2.2	5.2%	2.1%
CEO	IP	16.9	0.00%	1.3	342	2.4	312	54.2	1.5	5.6%	2.4%
KBC	IP	29.2	-0.80%	1.6	882	3.2	1,262	23.2	1.2	20.8%	11.7%
VGC	IP	52.9	1.30%	1.2	932	0.4	2,746	19.3	2.9	5.4%	12.5%
SZC	IP	40.4	1.50%	1.1	286	1.6	1,515	26.7	2.4	3.2%	13.4%
SIP	IP	90.1	-0.90%	1.3	644	3.3	5,701	15.8	4.3	0.3%	26.9%
PHR	IP	60.7	0.20%	1.1	323	0.3	3,448	17.6	2.2	15.8%	18.3%
GVR	IP	36.0	0.10%	1.5	5,657	9.2	628	57.3	2.8	0.3%	6.2%
NKG	Material	24.6	-1.00%	1.6	255	2.7	1,222	20.2	1.2	16.0%	2.3%
BMP	Chemicals	103.0	-1.40%	1.0	331	0.5	11,594	8.9	2.9	85.9%	39.1%
IJC	Real estate	15.0	-1.00%	1.5	222	0.5	865	17.3	1.3	5.9%	10.3%
DXG	Real estate	16.0	1.30%	1.8	453	2.3	420	38.1	1.1	20.0%	1.1%
VRE	Real estate	20.4	-1.90%	1.3	1,821	6.1	1,966	10.4	1.2	31.0%	12.4%
PDR	Real estate	24.3	1.20%	1.7	834	4.6	964	25.2	1.9	7.4%	7.2%
DIG	Real estate	27.2	3.40%	1.9	653	14.6	(38)	-709.8	2.2	5.2%	2.1%
DHC	Chemicals	39.2	-2.10%	1.1	124	0.7	3,461	11.3	1.7	35.8%	17.2%
PLX	O&G	41.3	-2.60%	0.9	2,062	1.7	2,570	16.1	1.9	17.1%	10.7%
PLC	O&G	26.8	0.00%	1.5	85	0.2	1,112	24.1	1.6	1.2%	8.4%
BSR	O&G	23.1	0.00%	1.1	2,814	5.7	2,588	8.9	1.2	0.8%	15.6%
DRC	Tyre	36.6	-2.30%	0.8	171	2.1	2,286	16.0	2.3	13.6%	13.2%
PC1	Utilities	29.4	-0.50%	1.4	359	8.7	651	45.2	1.7	8.5%	4.1%
HDG	Utilities	28.5	-0.50%	1.3	377	2.6	2,061	13.8	1.4	22.8%	12.9%
GEX	Utilities	22.4	0.40%	1.8	748	4.4	625	35.8	1.5	12.6%	4.1%
QTP	Utilities	17.2	0.00%	0.5	304	0.6	1,549	11.1	1.4	1.2%	10.8%
REE	Utilities	64.0	0.00%	1.0	1,182	2.0	4,706	13.6	1.5	49.0%	13.9%
ANV	Fishery	32.7	0.00%	1.4	171	1.0	(252)	-129.5	1.5	3.0%	1.5%
PTB	Fishery	72.1	-0.70%	0.7	190	0.3	4,765	15.1	1.8	20.9%	10.6%
PVT	Logistics	29.1	-1.00%	0.9	407	2.5	3,150	9.2	1.3	12.3%	14.3%
VSC	Logistics	21.6	0.00%	1.4	226	1.9	532	40.5	2.0	2.5%	6.2%
HAH	Logistics	44.4	-1.30%	1.3	212	6.3	3,081	14.4	1.7	3.9%	12.1%
VTP	Logistics	85.6	-1.60%	1.4	410	3.0	2,980	28.7	6.4	9.4%	25.6%
DBC	Retail	35.2	-2.20%	1.7	335	3.5	1,729	20.4	1.8	4.5%	0.5%
FRT	Retail	180.0	0.00%	0.7	963	2.7	(2,215)	-81.3	14.6	36.2%	11.8%
QNS	Retail	48.8	0.00%	0.6	684	0.8	6,737	7.2	2.0	15.5%	27.3%
PVT	O&G	29.1	-1.00%	0.9	407	2.5	3,150	9.2	1.3	12.3%	14.3%
TNG	Textile	25.4	0.00%	1.2	113	1.7	1,981	12.8	1.6	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.

DISCLAIMER

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