BSC

Mon, March 29, 2021

Overview

Vietnam Daily Review

Excited session at the beginning of the week

BSC's Forecast on the stock market

	Negative	Neutral	Positive
Day 30/3/2021		•	
Week 29/3-2/4/2021		•	
Month 03/2021		•	

Market outlook

Stock market: VNIndex rebounded from the beginning of the session and stayed in green throughout the trading time. On the market, investment cash flow increased with 18/19 sectors increasing although foreign investors were net sellers on both HSX and HNX. Besides, market breadth turned to a positive status with declining liquidity compared to last week's session. However, today's rally has not really ensured that the market has reversed, possibly moving along the sideways price channel in the 1160-1190 area will be the main trend in the next few sessions.

Future contracts: All future contracts increased following VN30. Investors might consider buying with target price around 1190 points for short-term contracts.

Covered warrants: In the trading session on March 29, 2021, majority of coverred warrants increased following underlying securities. Trading value decreased.

Technical analysis: CII_Rising

(Please go to page 2 for buy/sell status of stocks and page 4 for Blue chip stocks information)

Highlights

• VN-Index +13.47 points, closed at 1175.68. HNX-Index +5.2 points, closed at 276.16.

• Pulling up the index: CTG (+0.95); VNM (+0.89); VPB (+0.73); GVR (+0.59); MBB (+0.57).

• Pulling the index down: PLX (-0.1); KBC (-0.09); IJC (-0.05); BHN (-0.04); HRC (-0.03).

• The matched value of VN-Index reached VND 12,189 billion, -14.13% compared to the previous session. The total trading value reached 14,509 VND billion.

• Amplitude is 9.99 points. The market has 392 gainers, 34 reference codes and 83 losers.

• Foreign net-selling value: VND -153.65 billion on HOSE, including KDH (-179.6 billion), VCB (-156.6 billion) and HPG (-65.8 billion). Foreigners were net sellers on the HNX with a value of -19.93 billion dong.

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VN-INDEX 1175.68
Value: 12189.88 bil 13.47 (1.16%)
Foreigners (net): -153.65 bil.

HNX-INDEX 276.16
Value: 2711.28 bil 5.2 (1.92%)
Foreigners (net): -19.93 bil.

UPCOM-INDEX 80.52
Value: 0.86 bil 0.67 (0.84%)
Foreigners (net): -6.58 bil.

Macro indicators

	Value	% Chg
Oil price	60.2	-1.28%
Gold price	1,725	-0.42%
USD/VND	23,076	0.00%
EUR/VND	27,214	0.25%
JPY/VND	21,045	0.03%
Interbank 1M interest	0.7%	54.85%
5Y VN treasury Yield	1.2%	0.00%

Source: Bloomberg, BSC Research

Top Foreign trading stocks (Bil. VND)

Top buy	Value	Top sell	Value
VIC	168.6	KDH	-179.6
GEX	80.5	VCB	-156.6
MBB	29.6	HPG	-65.8
CII	24.6	VNM	-43.3
E1VFVN30	24.2	CTG	-34.2

Source: BSC Research

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3/29/2021

Vietnam Daily Review

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Technical Analysis

CII_Rising

Technical highlights:

- Current trend: Rising.
- MACD trend indicator: Appear Golden Cross.
- RSI indicator: The RSI is in the overbought zone.
- MAs line: EMA12 is above EMA26.

Outlook: CII is currently in a status of continuing to increase prices after having had a short period of consolidation in the 23 - 24 area. Liquidity increased in today's session pushed this stock price to close at the ceiling. Trend indicators are in a positive status. Although the RSI is in the overbought zone, the MACD line has just crossed above its signal line so the stock will continue to consolidate the uptrend. The nearest support of CII is at around 24. The target of taking profit is at 28.5, cutting loss if 22.5 is penetrated.

Source: BSC, PTKT Itrade

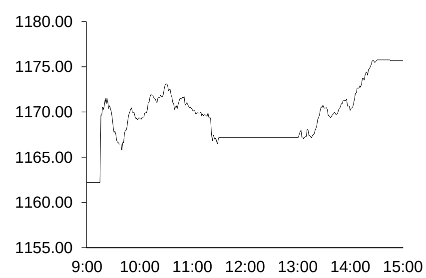
Bảng 1

Noticable sectors

Sectors	±%
Petroleum	-0.44%
Retail	0.58%
Raw material	0.58%
Real Estate	0.69%
Electricity, water & petroleum	0.84%
Industrial Goods & Services	1.02%
Food and drink	1.05%
Health	1.06%
Insurance	1.36%
L2 communication	1.46%
Travel and Entertainment	1.55%
Bank	1.59%
Financial services	1.70%
Construction and Materials	1.88%
Information Technology	1.98%
Chemical	2.06%
Cars and spare parts	2.42%
Personal & Consumer Goods	2.43%
Telecommunication	3.45%

Exhibit 1

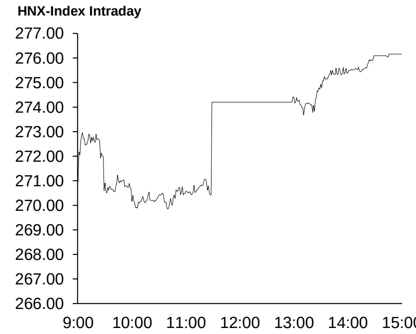
HSX-Index Intraday



Source: Bloomberg, BSC Research

Exhibit 2

HNX-Index Intraday



Source: Bloomberg, BSC Research

Future contracts market

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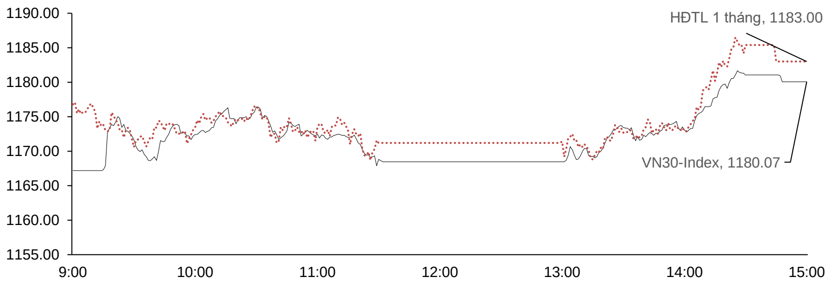
Chart 3

VN30-Index Intraday vs 1 month Future contrat Intraday



Source: Bloomberg, BSC Research

Table 2

Top leaders VN30

Ticker	Price	± Daily (%)	Index pt
VPB	44.50	**2.53**	2.51
VNM	99.00	**1.64**	1.65
MBB	28.25	**2.73**	1.56
FPT	77.60	**1.97**	1.17
CTG	40.00	**2.43**	0.66

Source: Bloomberg, BSC Research

Table 3

Future contracts

Ticker	Close	± Daily	± Basis	% Volume	Trading volume	Time to expiration	Remaining days
VN30F2104	1183.00	0.85%	2.93	-26.2%	166,664	4/15/2021	19
VN30F2105	1182.20	0.82%	2.13	-28.0%	316	5/20/2021	54
VN30F2106	1183.90	0.77%	3.83	511.7%	575	6/17/2021	82
VN30F2109	1217.00	3.66%	36.93	-56.3%	69	9/16/2021	173

Source: Bloomberg, BSC Research

Table 3

Top Laggards VN30

Ticker	Price	± Daily (%)	Index pt
PLX	55.6	**-0.54**	-0.05
SBT	22.1	**0.23**	0.02
PNJ	85.0	**0.12**	0.02
GAS	89.5	**0.34**	0.04
MWG	130.1	**0.08**	0.04

Source: Bloomberg, BSC Research

Outlook:

• VN30 Index increased strongly +12.88 points to 1180.07 points. Key stocks such VPB, VNM, MBB, FPT, CTG strongly impacted the increase of VN30. VN30 spent majority of trading time accumulating around 1170-1175 points, before increasing positively toward the end of the session to around 1180 points. VN30 might increase to around 1190 points in coming sessions.

• All future contracts increased following VN30. In terms of trading volume, except for VN30F2106, all future contracts decreased. In terms of open interest position, except for VN30F2106, all future contracts increased. Investors might consider buying with target price around 1190 points for short-term contracts.

Covered warrant market

Ticker	Expiration date	Remaing days	CR	Volume	Annualized sigma	Issuance price	Trading price	% +/- Daily	Theoritical price*	Price/ Value	Break-even price	Exercise price	Underlying stock price
CMSN2011	4/1/2021	3	5:1	175,100	35.33%	2,000	6,880	16.61%	6,824	1.01	61,266	51,385	86,100
CMBB2010	6/14/2021	77	1:1	392,400	33.67%	4,600	12,630	7.95%	12,410	1.02	20,600	16,000	28,250
CSBT2007	4/27/2021	29	2:1	577,400	42.28%	1,700	3,620	7.10%	3,057	1.18	18,788	15,495	22,050
CHPG2102	7/5/2021	98	1:1	117,300	32.87%	6,600	9,450	6.18%	6,722	1.41	47,600	41,000	46,300
CPNJ2009	4/1/2021	3	8:1	279,700	32.86%	1,400	3,520	6.02%	3,378	1.04	68,671	57,557	85,000
CHPG2103	7/6/2021	99	2:1	222,100	32.87%	3,900	4,840	5.22%	3,006	1.61	49,800	42,000	46,300
CVRE2013	7/30/2021	123	1:1	208,400	33.69%	5,000	7,790	4.56%	6,453	1.21	32,500	27,500	33,050
CVRE2014	5/4/2021	36	1:1	217,900	33.69%	4,600	6,360	4.43%	5,726	1.11	32,100	27,500	33,050
CSTB2007	4/27/2021	29	2:1	543,800	39.47%	1,500	4,160	4.00%	4,143	1.00	13,999	10,999	19,200
CSTB2012	4/1/2021	3	1:1	206,600	39.47%	2,500	6,000	3.81%	6,205	0.97	15,500	13,000	19,200
CSTB2014	6/14/2021	77	1:1	141,700	39.47%	3,800	7,580	3.41%	7,323	1.04	15,800	12,000	19,200
CVHM2009	4/1/2021	3	10:1	439,000	30.88%	1,400	2,380	3.03%	2,423	0.98	86,000	72,000	96,200
CTCB2013	5/4/2021	36	1:1	115,200	35.47%	4,700	16,740	2.95%	16,658	1.00	27,700	23,000	39,550
CHPG2024	4/7/2021	9	2:1	201,500	32.87%	2,200	9,250	2.78%	9,418	0.98	31,900	27,500	46,300
CTCB2012	7/30/2021	123	1:1	164,000	35.47%	5,400	18,510	2.78%	17,902	1.03	27,400	22,000	39,550
CVIC2006	4/1/2021	3	10:1	388,800	29.85%	1,700	2,480	1.22%	2,583	0.96	104,000	87,000	112,800
CHPG2010	4/5/2021	7	4:1	176,600	32.87%	1,800	5,870	1.21%	3,308	1.77	32,969	27,079	46,300
CHPG2105	8/9/2021	133	2:1	379,800	32.87%	3,000	5,040	1.00%	3,266	1.54	48,000	42,000	46,300
CTCB2010	4/1/2021	3	2:1	148,000	35.47%	2,000	8,970	0.79%	9,029	0.99	25,500	21,500	39,550
			Total	5,095,300	34.81%**								

Note: *Table includes covered warrant with the most trading values*
Risk-free rate is 4.75%
*****Average annualized sigma***
CR: Coversion rates
Remaining days: number of days to expiration
**** Theoritical price is calculated according to Black-Scholes Model***

Outlook:

• In the trading session on March 29, 2021, majority of coverred warrants increased following underlying securities. Trading value decreased.

• CVHM2101 and CMSN2011 increased strongly at 16.67% and 16.61% respectively. In contrast, CFPT2011 and CFPT2014 decreased strongly at -18.72% and -17.43% respectively. Trading value decreased by -16.21%. CMBB2010 had the most trading value, accounting for 8.74% of the market.

• CVNM2014, CFPT2011, CFPT2014, CVPB2013, and CHPG2025 have market prices closest to theoretical prices. CVPB2013, CHPG2025, and CVPB2012 were the most positive in term of profitability. CHPG2020, CHPG2014, and CVPB2015 were the most positive in term of money position.

DUCGIANG CHEMICALS & DETERDENT POWDER JOINT CO (POSITIVE): PRUDENT BUSINESS PLAN

Ticker*: DGC (HSX), Market cap: 9,952 billion, Number of outstanding shares: 148.7 million shares, Market price: 70,400 VND, Foreign ownership: 2.31%*

Analyst: Nguyen Thi Cam Tu, CFA

Business plan for 2021: The company targets revenue and profit after tax at 7.552 billion (+ 21% YoY) and 1,100 billion (+ 16% YoY) respectively. Dividend for 2020 is 30% (15% cash dividend - paid; 15% share dividend).

Updated business results for the first quarter of 2021: Profit in Q1 is expected to reach 270 - 280 billion, equivalent to 35% growth over the same period, completing 24.5% of the annual profit plan.

Prices of export commodities are on an upward trend: (i) yellow phoshorus prices continue to rise, there is no sign of cooling (ii) DAP prices fluctuate around 9-12.5 million / ton, demand for DAP continues At a high level.

Update investment projects

a. Project Duc Giang - Nghi Son:

Progress: The company is in the process of negotiating and relocating people in the affected area. DGC expects the project to start in June. Capital needs for the project:

+ Phase 1 (Caustic soda factory): investment cost is about 1,000 billion

+ The next phase: the company will equitize Duc Giang - Nghi Son Co., Ltd with a chartered capital of 3,000 billion dong (DGC contribution of 1,600 billion). The rest will be issued to strategic shareholders and existing shareholders. Expected release time 2022..

b. 25 ore site project

Progress: Currently, DGC is stripping the surface rock layer of the quarry and proceeding to connect the mine from the quarry to the factory. DGC expects to use the first ton of ore in April. Mining field 25 is expected to meet 30% of annual ore demand (DGC's total demand: 1.4 - 1.6 million tons / year).

c. Power plant project

Progress: DGC is reassessing the project's environmental impact at the request of the government.

Investment opinion: BSC continues to maintain a Positive rating for DGC in 2021. DGC's share price has risen 21% from BSC's latest update report to VND70,400 / share - below BSC's target price is 72,800 VND. With BSC's 2021 business forecast of 7.14 billion revenue (+ 14.5% YoY) and 1,198 billion profit after tax (+ 26.4% YoY), BSC believes that the business plan is quite conservative. Currently, DGC's share price is traded at P / E of 9.3 according to BSC's forecast and 9.5 according to company plan, 13% higher than industry P / E.

Bluechip Stocks

Ticker	Sector	Close (thousand VND)	% Day	Beta	Market Cap. (mil. USD)	Vol. (mil. USD)	EPS (VND)	P/E	P/B	Foreign owned	ROE
MWG	Retail	130.1	0.1%	1.0	2,637	4.9	8,654	15.0	3.8	49.0%	28.4%
PNJ	Retail	85.0	0.1%	1.0	840	1.7	4,532	18.8	3.7	49.0%	20.9%
BVH	Insurance	59.2	1.4%	1.5	1,911	1.3	2,087	28.4	2.2	27.6%	7.9%
PVI	Insurance	32.3	1.6%	0.5	314	0.1	3,406	9.5	1.0	54.3%	11.1%
VIC	Real Estate	112.8	0.4%	0.7	16,589	15.4	1,569	71.9	4.9	14.2%	6.7%
VRE	Real Estate	33.1	2.6%	1.1	3,265	6.4	1,048	31.5	2.6	30.6%	8.5%
VHM	Real Estate	96.2	0.5%	1.1	13,759	6.0	8,463	11.4	3.7	22.3%	39.1%
DXG	Real Estate	23.7	1.1%	1.3	533	4.0	(956)		2.0	33.6%	-7.5%
SSI	Securities	31.4	1.6%	1.4	882	7.7	2,093	15.0	1.9	41.9%	13.1%
VCI	Securities	64.3	0.6%	1.0	463	4.3	4,662	13.8	2.4	26.4%	17.9%
HCM	Securities	30.5	2.9%	1.5	404	2.8	1,738	17.5	2.1	46.3%	12.1%
FPT	Technology	77.6	2.0%	0.9	2,645	6.7	4,520	17.2	3.9	49.0%	23.8%
FOX	Technology	77.9	1.6%	0.4	927	0.0	5,165	15.1	4.5	0.0%	30.0%
GAS	Oil & Gas	89.5	0.3%	1.4	7,448	1.0	4,102	21.8	3.5	2.9%	16.2%
PLX	Oil & Gas	55.6	-0.5%	1.5	3,007	1.6	631	88.1	3.2	16.4%	4.4%
PVS	Oil & Gas	22.5	-0.9%	1.6	468	6.8	1,357	16.6	0.9	9.1%	5.4%
BSR	Oil & Gas	16.6	1.8%	0.8	2,238	9.8	898	18.5	1.5	41.1%	8.5%
DHG	Pharmacy	99.8	1.8%	0.4	567	0.0	5,443	18.3	3.7	54.6%	20.5%
DPM	Fertilizer	19.5	1.0%	0.7	332	1.6	1,663	11.7	0.9	13.5%	8.6%
DCM	Fertilizer	17.5	4.2%	0.6	403	3.8	1,017	17.2	1.5	3.3%	8.7%
VCB	Banking	95.3	0.4%	1.1	15,368	4.9	4,974	19.2	3.6	23.5%	20.5%
BID	Banking	42.6	1.1%	1.3	7,441	2.5	1,740	24.5	2.2	17.1%	9.3%
CTG	Banking	40.0	2.4%	1.4	6,475	20.0	3,678	10.9	1.8	27.4%	16.9%
VPB	Banking	44.5	2.5%	1.2	4,749	5.2	4,271	10.4	2.1	23.4%	21.9%
MBB	Banking	28.3	2.7%	1.2	3,438	20.4	2,965	9.5	1.7	23.2%	19.2%
ACB	Banking	33.0	1.7%	1.0	3,101	10.0	3,557	9.3	2.0	30.0%	24.3%
BMP	Plastic	58.7	0.5%	0.7	209	0.8	6,386	9.2	1.9	81.4%	21.2%
NTP	Plastic	36.3	0.8%	0.5	186	0.0	3,797	9.6	1.7	18.9%	17.3%
MSR	Resources	20.6	-0.5%	0.7	984	0.5	39	528.2	1.6	10.1%	0.3%
HPG	Steel	46.3	0.2%	1.1	6,670	26.7	4,060	11.4	2.6	30.2%	25.2%
HSG	Steel	27.7	1.1%	1.4	534	6.3	3,387	8.2	1.7	7.2%	24.3%
VNM	Consumer staples	99.0	1.6%	0.7	8,996	12.0	4,770	20.8	6.6	56.1%	33.9%
SAB	Consumer staples	173.3	0.2%	0.8	4,832	0.8	7,064	24.5	5.6	63.0%	24.4%
MSN	Consumer staples	86.1	0.2%	0.9	4,397	3.4	1,054	81.7	6.3	32.1%	4.2%
SBT	Consumer staples	22.1	0.2%	1.2	592	3.4	946	23.3	1.7	7.9%	7.4%
ACV	Transport	73.9	1.5%	0.8	6,995	0.3	3,450	21.4	4.4	3.4%	22.3%
VJC	Transport	131.6	0.8%	1.1	2,997	3.6	132		4.6	19.1%	0.5%
HVN	Transport	32.8	2.5%	1.7	2,023	1.5	(7,647)		7.3	9.2%	-88.4%
GMD	Transport	33.0	1.5%	0.9	432	1.4	1,133	29.1	1.7	37.8%	5.7%
PVT	Transport	17.1	3.0%	1.3	241	1.7	1,953	8.8	1.1	12.5%	13.7%
VCS	Materials	98.8	2.4%	1.0	687	1.8	8,257	12.0	4.1	3.7%	39.1%
VGC	Materials	34.5	-0.1%	0.4	672	0.3	1,340	25.7	2.4	6.5%	9.5%
HT1	Materials	18.4	2.2%	0.9	305	0.9	1,613	11.4	1.3	3.2%	11.5%
CTD	Construction	73.5	3.4%	1.1	237	1.8	5,769	12.7	0.7	45.3%	5.2%
CII	Construction	25.6	6.9%	0.4	265	9.5	1,030	24.8	1.3	31.4%	5.1%
REE	Electricity	54.3	0.6%	-1.4	730	0.7	5,250	10.3	1.5	49.0%	14.9%
PC1	Electricity	28.3	2.4%	-0.4	235	0.5	2,642	10.7	1.4	11.7%	13.6%
POW	Electricity	13.1	3.1%	0.6	1,334	6.3	938	14.0	1.1	4.0%	7.9%
NT2	Electricity	22.2	0.9%	0.5	278	0.5	2,095	10.6	1.5	15.3%	14.3%
KBC	Industrial park	37.5	-2.0%	1.1	765	9.3	363	103.0	1.8	22.3%	1.8%
BCM	Industrial park	57.5	1%	1.0	2,588	0.0			3.8	2.0%	

Market statistics

Top 5 leaders on the HSX

Ticker	Price	% Change	Index pt	Volume
CTG	40.00	2.43	0.94	11.59MLN
VNM	99.00	1.64	0.89	2.79MLN
VPB	44.50	2.53	0.72	2.73MLN
GVR	27.85	2.01	0.58	1.67MLN
MBB	28.25	2.73	0.56	16.88MLN

Top 5 leaders on HNX

Ticker	Price	% Change	Index pt	Volume
SHB	21.40	9.74	4.01	55.78MLN
NVB	15.00	2.74	0.25	6.18MLN
HUT	6.70	9.84	0.23	20.61MLN
VCS	98.80	2.38	0.11	427200.00
BAB	29.30	0.34	0.11	37600

Top 5 laggards on the HSX

Ticker	Price	% Change	Index pt	Volume
PLX	0.00	-0.10	662600	1.11MLN
KBC	0.00	-0.10	5.66MLN	607060
IJC	0.00	-0.05	12.08MLN	373600
BHN	0.00	-0.04	900	192700
HRC	-0.01	-0.04	100	611640

Top 5 laggards on the HNX

Ticker	Price	% Change	Index pt	Volume
PVS	22.50	-0.88	-0.07	6.92MLN
DL1	15.00	-5.66	-0.06	13200
L14	83.00	-2.35	-0.05	76800
IDC	37.40	-0.53	-0.05	1.41MLN
HTC	31.80	-9.14	-0.03	200

Top 5 gainers on the HSX

Ticker	Price	% Change	Index pt	Volume
TCM	107.00	7.00	0.12	444200.00
TNT	5.35	7.00	0.00	546800
SHI	14.55	6.99	0.02	91200
MCG	3.22	6.98	0.00	100700
ROS	4.45	6.97	0.04	33.77MLN

Top 5 gainers on the HNX

Ticker	Price	% Change	Index pt	Volume
KDM	7.70	10.0	0.01	203900
QHD	34.10	10.0	0.02	1600
SVN	5.50	10.0	0.01	268300
GDW	30.90	10.0	0.01	1800
KTS	18.80	9.9	0.01	22100.00

Top 5 cổ phiếu giảm mạnh nhất trên HSX

Ticker	Price	% Change	Index pt	Volume
HAP	16.65	-6.98	-0.02	164300
TTE	10.70	-6.96	-0.01	1600
CMV	16.75	-6.94	0.00	1300.00
SC5	21.75	-6.85	-0.01	200
DTT	12.60	-6.67	0.00	100

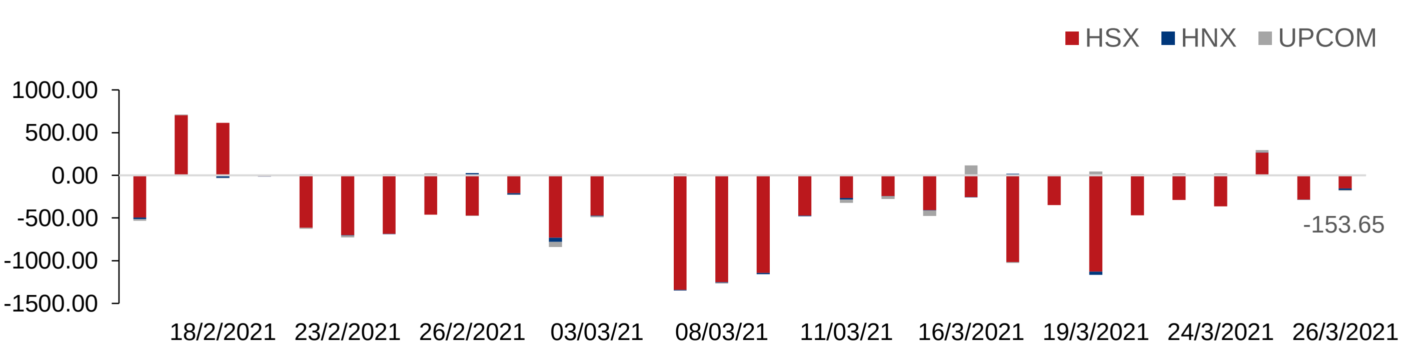
Source: Bloomberg, BSC Research

Top 5 losers on the HNX

Ticker	Price	% Change	Index pt	Volume
TPH	10.00	-10.71	0.00	2000
VNT	72.10	-9.99	-0.02	300
VE4	21.90	-9.88	0.00	22500
HTC	31.80	-9.14	-0.03	200
DAE	18.00	-9.09	0.00	600

Exhibit 3

Foreign transaction



Source: HSX, HNX, BSC Research

Disclosure

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Bloomberg: RESP BSCV <GO>

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