

STOCK MARKET

The VN-Index continued to drop nearly 10 points today, closing at 1,269.89 points. Market breadth leaned towards the negative, with 14 out of 18 sectors declining, led by the Media, followed by Chemicals, Information Technology,.... Regarding foreign investors' activity, they were net sellers on both HSX and HNX exchanges today. The market has widened its fluctuation range towards the support level of 1,265. If it falls below this level, the VN-Index could drop to 1,260 or further down to 1,240.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 22/10/2024, warrants fluctuated according to the recovery of the underlying stocks.

HIGHLIGHT

- VN-Index **-9.88** points, closing at **1269.89** points. HNX-Index **-1.93** points, closing at **225.5** points.
- Pulling the index up: **VHM (+0.48)**, **EIB (+0.38)**, **MWG (+0.18)**, **GMD (+0.17)**, **VCF (+0.10)**.
- Pulling the index down: **GVR (-1.36)**, **BID (-1.23)**, **FPT (-0.85)**, **VCB (-0.81)**, **CTG (-0.65)**.
- The matched trade value of VN-Index reached VND **17,476** billion, increased **29.86%** compared to the previous session. The total transaction value reached VND 19,027 billion.
- The trading range is 14.77 points. The market had **107** gainers, 58 remaining unchanged, **269** losers.
- Foreign investors' net selling value: VND **-138.63** billion on HOSE, including **FUEVFNVD (VND -99.54 billion)**, **KDH (VND -68.80 billion)**, **VRE (VND -51.31 billion)**, **HPG (VND -46.84 billion)**, **VCI (VND -39.02 billion)**. Foreign investors were net sellers on HNX with the value of VND **-86.70** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.63%**. Positive stocks: **VHM (+5.64%)**, **VPB (+0.49%)**, **MWG (+0.15%)**.
- BSC50 **-0.81%**. Positive stocks: **EIB (+6.94%)**, **BMP (+3.19%)**, **CTD (+2.52%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.63%	-0.81%	-0.62%	-0.50%
1 week	-0.62%	-0.79%	0.11%	0.45%
1 months	0.96%	1.07%	1.13%	1.47%
3 months	2.54%	0.14%	2.04%	4.15%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,269.89	225.50	91.73
% 1D	-0.77%	-0.85%	-0.44%
TV (bil VND)	17,476	994	563
%1D	29.86%	35.05%	24.29%
Foreign (bil VND)	-138.63	-86.70	1.12

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MWG	76.64	FUEVFNVD	-99.54
TCB	65.03	KDH	-68.80
BVH	59.68	VRE	-51.31
VPB	55.42	HPG	-46.84
CTD	47.48	VCI	-39.02

Overview of global stock markets

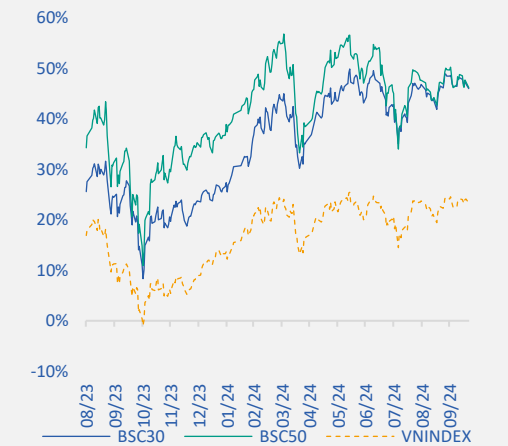
		%D	%W
SPX	5,854	-0.18%	-0.10%
FTSE100	8,268	-0.60%	0.23%
Eurostoxx	4,927	-0.47%	-2.00%
Shanghai	3,286	0.54%	2.64%
Nikkei	38,406	-1.60%	-3.87%

Source: Bloomberg

	Close	%
Commodities		
Brent	74	-0.19%
Gold	2,721	
Exchange rate		
USD/VND	25,452	0.09%
EUR/VND	28,258	0.36%
JPY/VND	172	
Interst rates		
10Y-Gov bond rate	2.71%	0.02%
1M-interbank rate	3.14%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

Contents

Market outlook	Page 1
Futures contracts	Page 2
Market statistics	Page 3
BSC30	Page 4
BSC50	Page 5
Disclaimer	Page 6

MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
VHM	48.25	0.94%	0.48	4.35
EIB	21.60	3.85%	0.38	1.86
MWG	66.30	0.76%	0.18	1.46
GMD	62.80	3.46%	0.17	0.31
VCF	227.90	6.59%	0.10	0.03

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
VCS	64.30	1.58%	0.12	0.16
SHN	6.80	7.94%	0.05	0.13
LAS	21.50	1.90%	0.03	0.11
VC2	8.60	3.61%	0.02	0.07
PCT	12.00	3.45%	0.01	0.05

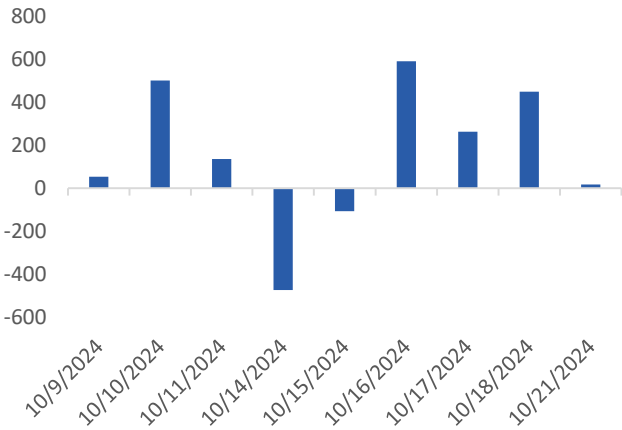
Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
MSH	47.50	6.98%	0.06	0.50
HHV	10.75	6.97%	0.08	9.46
BMC	21.60	6.93%	0.00	0.44
VRC	8.81	6.92%	0.01	0.15
STG	43.95	6.80%	0.07	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BPC	14.40	9.92%	0.01	0.03
DTC	8.90	9.88%	0.01	0.00
HTC	5.60	9.80%	0.02	0.06
PIA	23.90	9.63%	0.14	0.00
PCT	34.00	8.97%	0.05	0.00

Figure 1
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
GVR	33.75	-4.12%	-1.36	4.00
BID	48.75	-1.81%	-1.23	5.70
FPT	133.10	-1.77%	-0.85	1.47
VCB	91.40	-0.65%	-0.81	5.59
CTG	35.00	-1.41%	-0.65	5.37

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
IDC	53.90	-3.06%	-0.39	0.33
PVS	38.00	-1.55%	-0.20	0.48
DTK	11.70	-3.31%	-0.19	0.68
SHS	14.60	-2.01%	-0.17	0.81
MBS	28.80	-1.37%	-0.15	0.55

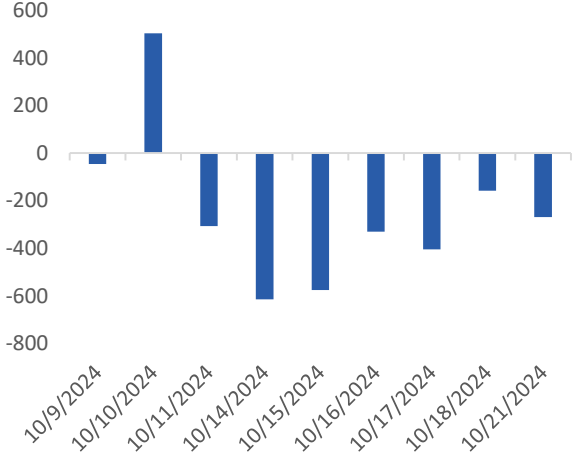
Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HVN	10.00	-6.98%	-0.01	1.92
HAG	10.75	-6.93%	-0.19	35.41
HHS	8.61	-6.92%	-0.05	3.41
NHA	23.55	-6.92%	-0.02	1.42
DXV	4.59	-6.90%	0.00	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
DAE	12.80	-9.86%	-0.01	0.00
HMR	21.10	-9.83%	-0.04	0.20
CMS	18.40	-9.80%	-0.17	0.61
TXM	6.50	-9.72%	-0.02	0.04
MCO	12.20	-9.63%	-0.02	0.05

Figure 2
Foreign transactions



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 ownership	Link
VCB	Bank	92.4	0.20%	0.6	20,666	4.3	5,962	15.5	105,000	23.4%	Link
BID	Bank	50.3	0.00%	1.1	11,474	6.8	4,006	12.6	54,578	17.1%	Link
VPB	Bank	20.6	-1.70%	1.0	6,524	20.1	1,461	14.1	23,685	24.8%	Link
TCB	Bank	24.4	0.40%	1.3	6,893	15.1	3,047	8.0	-	21.9%	Link
MBB	Bank	25.8	-0.60%	1.0	5,468	19.0	4,018	6.4	24,400	23.2%	Link
STB	Bank	35.6	2.70%	1.3	2,682	46.8	4,340	8.2	31,200	23.7%	Link
CTG	Bank	36.2	-0.80%	1.3	7,790	10.2	3,782	9.6	19,100	296.5%	Link
ACB	Bank	26.1	-0.20%	0.8	4,665	12.0	3,676	7.1	42,500	30.0%	Link
SSI	Broker	27.4	-0.40%	1.4	2,147	13.0	1,882	14.5	45,900	33.1%	Link
IDC	IP	55.9	0.40%	1.1	738	2.3	5,573	10.0	-	23.9%	Link
HPG	Material	27.0	-1.10%	1.1	6,898	17.5	1,746	15.4	23,300	22.3%	Link
HSG	Material	20.6	-1.00%	1.6	512	4.3	1,844	11.2	79,900	11.0%	Link
VHM	RE	45.2	0.30%	1.0	7,885	16.2	5,350	8.5	38,900	13.8%	Link
KDH	RE	32.8	-1.60%	1.2	1,313	2.4	765	42.9	44,100	34.5%	Link
NLG	RE	38.9	0.00%	1.2	599	3.9	1,102	35.3	46,100	49.7%	Link
DGC	Chemicals	114.0	-0.50%	1.5	1,732	3.8	7,898	14.4	85,000	18.1%	Link
DCM	Fertilizer	37.0	0.00%	1.3	783	2.5	2,828	13.1	41,000	7.4%	Link
GAS	O&G	71.7	0.30%	0.6	6,722	0.9	4,760	15.1	36,000	0.9%	Link
PVS	O&G	39.0	-1.30%	0.9	746	2.9	1,932	20.2	110,500	21.7%	Link
PVD	O&G	26.2	-1.10%	1.3	584	2.3	1,155	22.7	45,000	13.3%	Link
POW	Utilities	12.5	-0.40%	0.6	1,171	1.7	463	27.0	38,500	3.8%	Link
VHC	Fishery	73.2	0.70%	1.4	658	1.8	3,234	22.6	29,000	29.2%	Link
GMD	Logistics	71.8	-1.80%	0.9	892	3.6	4,054	17.7	14,500	48.6%	Link
VNM	Retail	67.4	-0.30%	0.6	5,637	4.3	4,633	14.5	81,700	51.8%	Link
MSN	Retail	80.4	-0.70%	1.3	4,868	16.4	466	172.4	27,700	26.5%	Link
MWG	Retail	65.7	-0.20%	1.2	3,844	16.2	1,507	43.6	63,800	46.9%	Link
PNJ	Retail	94.9	-0.20%	1.0	1,283	1.7	6,132	15.5	83,500	48.5%	Link
DGW	Retail	45.4	-1.30%	1.8	395	1.7	2,236	20.3	90,900	24.7%	Link
FPT	Tech	137.0	0.00%	1.1	8,065	11.9	4,890	28.0	57,000	46.0%	Link
CTR	Tech	132.0	-0.60%	1.4	604	1.7	4,590	28.8	108,000	9.5%	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	27.0	1.50%	0.9	3,147	9.1	4,137	6.5	1.6	18.1%	27.8%
VIB	Bank	19.5	0.80%	1.1	2,325	23.4	3,048	6.4	1.3	4.2%	21.4%
TPB	Bank	17.8	-0.60%	1.2	1,882	21.0	2,154	8.3	1.1	30.0%	14.2%
MSB	Bank	13.0	-1.10%	1.1	1,358	13.3	2,366	5.5	0.8	29.1%	14.9%
EIB	Bank	19.4	3.50%	0.7	1,450	21.2	1,273	15.3	1.4	2.6%	9.9%
HCM	Broker	30.4	-0.50%	1.6	877	13.6	1,397	21.8	2.0	45.6%	10.6%
VCI	Broker	36.1	-1.60%	1.6	830	12.6	1,763	20.5	1.8	19.5%	9.6%
VND	Broker	14.8	-0.30%	1.5	905	4.6	1,591	9.3	1.3	12.4%	15.0%
BSI	Broker	51.2	-0.80%	1.7	457	1.3	2,165	23.7	2.1	40.1%	9.3%
SHS	Broker	15.3	-0.60%	1.7	498	2.0	1,338	11.4	1.1	7.0%	10.5%
CTD	Const	63.4	0.50%	1.4	254	1.0	3,098	20.5	0.7	46.6%	3.6%
HHV	Const	11.9	-0.80%	1.7	206	1.6	869	13.7	0.6	8.0%	4.4%
LCG	Const	10.8	-0.50%	1.6	83	0.4	766	14.1	0.8	2.1%	5.7%
SZC	IP	39.0	3.60%	1.1	281	5.9	1,572	24.8	2.3	3.0%	12.1%
SIP	IP	73.2	0.10%	1.4	617	0.3	5,931	12.3	3.4	2.5%	29.0%
PHR	IP	57.9	0.00%	1.0	314	0.2	3,028	19.1	2.1	18.2%	12.1%
DIG	RE	20.4	-3.10%	1.7	498	4.2	151	135.1	1.6	5.1%	1.1%
CEO	RE	15.1	-1.90%	1.7	326	1.7	318	47.4	1.3	5.0%	2.1%
KBC	IP	27.7	0.00%	1.5	851	4.8	300	92.4	1.2	20.3%	1.7%
VGC	IP	42.8	0.00%	1.3	767	1.4	1,776	24.1	2.4	3.8%	8.2%
GVR	IP	35.8	-0.40%	1.4	5,738	6.5	693	51.7	2.8	0.5%	6.5%
NKG	Material	20.9	-1.40%	1.6	220	2.8	1,580	13.2	1.0	9.4%	7.4%
BMP	Material	128.4	-1.20%	1.3	421	1.3	12,420	10.3	3.6	83.8%	34.6%
IJC	RE	13.6	-0.70%	1.4	206	0.7	683	19.9	1.0	4.9%	6.0%
DXG	RE	16.0	-0.30%	1.5	463	9.4	249	64.5	1.1	18.5%	1.9%
VRE	RE	18.8	0.00%	1.4	1,705	3.8	1,975	9.5	1.1	21.6%	11.9%
PDR	RE	20.9	-0.70%	1.8	730	5.8	500	41.8	1.7	7.0%	5.0%
DIG	RE	20.4	-3.10%	1.7	498	4.2	151	135.1	1.6	5.1%	1.1%
HUT	Const	16.3	-0.60%	1.1	582	0.4	64	256.9	1.7	1.6%	1.7%
C4G	Const	8.6	0.00%	1.2	-	0.1	503	17.1	0.8	0.0%	4.8%
CSV	Chemicals	36.2	-0.10%	1.9	160	1.2	4,748	7.6	1.1	1.8%	15.2%
DHC	Chemicals	36.4	-0.70%	1.1	117	0.1	3,067	11.9	1.6	39.1%	13.3%
DRC	Tyre	29.2	-1.00%	0.8	139	0.6	2,509	11.6	1.9	10.1%	16.5%
PC1	Utilities	27.6	0.40%	1.3	343	1.0	1,203	22.9	1.6	13.4%	6.1%
HDG	Utilities	27.5	-1.60%	1.3	370	2.1	1,958	14.0	1.5	14.6%	11.8%
GEX	Utilities	20.5	0.50%	1.5	705	3.3	1,245	16.5	1.3	7.1%	7.0%
QTP	Utilities	13.9	0.00%	0.6	-	0.1	1,357	10.2	1.1	1.0%	11.2%
PLX	O&G	42.4	0.20%	0.8	2,153	1.4	2,879	14.7	2.1	17.8%	13.8%
BSR	O&G	22.5	-0.90%	1.0	-	2.9	2,408	9.3	1.2	0.0%	13.4%
PLC	O&G	23.6	0.00%	1.5	76	0.0	734	32.2	1.6	0.3%	4.7%
ANV	Fishery	33.3	0.30%	1.6	177	1.1	114	292.9	1.6	0.7%	1.2%
PTB	Material	61.3	-0.50%	1.0	164	0.2	4,899	12.5	1.5	24.3%	11.9%
VSC	Logistics	17.2	-0.30%	1.3	198	0.8	713	24.2	1.1	2.4%	7.3%
HAH	Logistics	42.2	-1.60%	1.3	205	3.7	2,800	15.1	1.8	9.9%	10.6%
VTP	Logistics	86.6	1.30%	1.7	422	3.9	2,893	29.9	6.6	7.2%	22.8%
DBC	Retail	29.5	0.50%	1.5	395	4.9	1,604	18.4	1.5	12.1%	5.0%
FRT	Retail	177.3	-0.40%	0.8	967	2.1	(414)	-427.9	14.5	37.5%	11.8%
QNS	Retail	49.5	0.00%	0.6	-	0.8	6,678	7.4	2.0	12.0%	28.7%
TNG	Textile	24.9	-0.40%	1.3	122	1.0	2,254	11.0	1.6	16.7%	14.7%
PVT	Logistics	28.0	-0.70%	1.1	398	1.3	2,805	10.0	1.4	13.3%	14.2%
DPM	Fertilizer	34.4	-0.30%	1.3	539	2.0	1,703	20.2	1.1	8.0%	5.5%
REE	Utilities	64.8	-0.20%	1.1	1,221	0.7	3,804	17.0	1.7	49.0%	10.0%

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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