

STOCK MARKET

The VN-Index traded around the 1,240 level today and closed at 1,240.41, down more than 9 points compared to yesterday. Market breadth tilted negative with 15 out of 18 sectors declining, with Retail, Financial Services, and Chemicals leading the drop. Regarding foreign trading, foreign investors were net sellers on both the HSX and HNX exchanges. The recovery of the VN-Index has stalled at the resistance level of 1,260. The index's next move will depend on the bottom-fishing momentum at the 1,240 level.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 04/12/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-9.42** points, closing at **1240.41** points. HNX-Index **-0.67** points, closing at **224.62** points.
- Pulling the index up: **VCB (+0.69)**, **SAB (+0.39)**, **VTP (+0.28)**, **PLX (+0.09)**, **BMP (+0.08)**.
- Pulling the index down: **BID (-1.23)**, **VHM (-0.79)**, **CTG (-0.77)**, **MWG (-0.59)**, **FPT (-0.53)**.
- The matched trade value of VN-Index reached VND **11,937** billion, increased **4.19%** compared to the previous session. The total transaction value reached VND 13,916 billion.
- The trading range is 7.96 points. The market had **109** gainers, 281 remaining unchanged, **65** losers.
- Foreign investors' net selling value: VND **-652.70** billion on HOSE, including **MWG (VND -260.17 billion)**, **FPT (VND -134.20 billion)**, **VRE (VND -82.85 billion)**, **VNM (VND -75.17 billion)**, **NLG (VND -46.79 billion)**. Foreign investors were net sellers on HNX with the value of VND **-27.39** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.22%**. Positive stocks: **CTR (+5.22%)**, **POW (+2.02%)**, **FPT (+1.97%)**.
- BSC50 **-0.10%**. Positive stocks: **VTP (+5.65%)**, **HDB (+2.56%)**, **SIP (+1.82%)**.

Indices' performances (Updated 29/11)

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.22%	-0.10%	-0.11%	0.03%
1 week	0.52%	1.02%	0.73%	0.74%
1 months	3.22%	3.49%	3.07%	3.19%
3 months	-4.51%	-4.40%	-3.21%	-2.23%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,240.41	224.62	92.44
% 1D	-0.75%	-0.30%	0.00%
TV (bil VND)	11,937	865	563
%1D	4.19%	9.93%	0.14%
Foreign (bil VND)	-652.70	-27.39	-31.87

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
HAH	71.94	MWG	-260.17
MSN	65.99	FPT	-134.20
TCB	43.54	VRE	-82.85
KBC	30.39	VNM	-75.17
VPB	27.11	NLG	-46.79

Overview of global stock markets

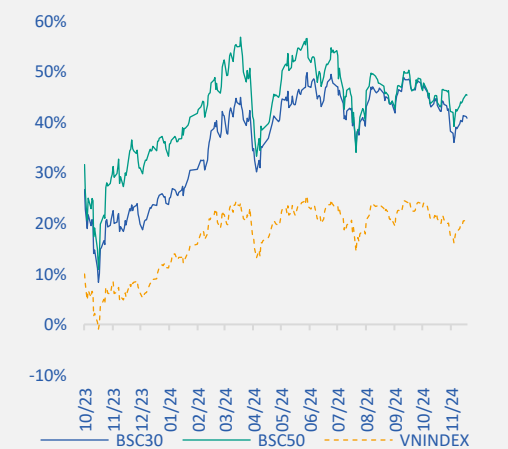
		%D	%W
SPX	6,050	0.04%	1.04%
FTSE100	8,329	-0.36%	0.66%
Eurostoxx	4,906	0.90%	3.47%
Shanghai	3,365	-0.42%	1.66%
Nikkei	39,232	0.06%	2.94%

Source: Bloomberg

	Close	%
Commodities		
Brent	74	0.01%
Gold	2,667	
Exchange rate		
USD/VND	25,475	0.01%
EUR/VND	27,406	0.12%
JPY/VND	173	
Interst rates		
10Y-Gov bond rate	2.86%	0.02%
1M-interbank rate	4.61%	

Source: BSC Research

Performances of BSC30, BSC50



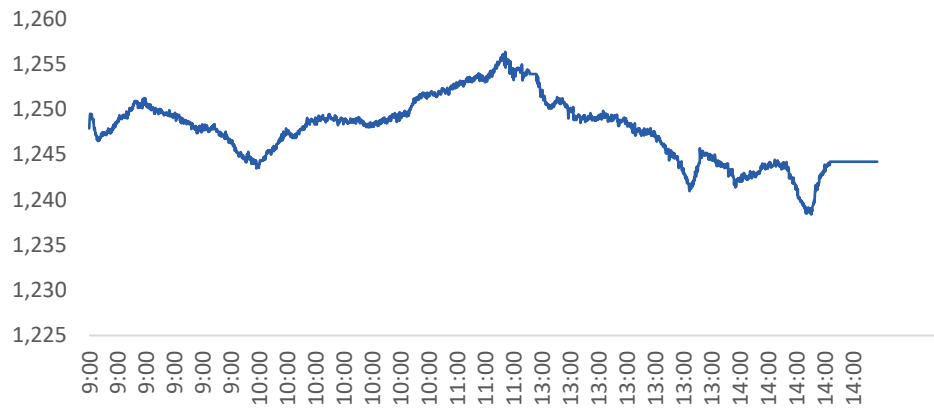
Source: BSC Research

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FUTURE CONTRACTS MARKET

VN30-Index Intraday vs 1 month Future contrat Intraday



MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
VCB	93.50	0.54%	0.69	5.59
SAB	57.40	2.14%	0.39	1.28
VTP	150.90	6.27%	0.28	0.12
PLX	40.30	0.75%	0.09	1.27
BMP	127.20	3.08%	0.08	0.08

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	51.20	9.87%	0.70	0.20
NTP	62.90	2.11%	0.12	0.13
HGM	178.00	7.23%	0.11	0.01
VIF	17.20	2.38%	0.10	0.35
DNP	20.50	4.59%	0.09	0.14

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

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
BID	45.15	-1.95%	-1.23	5.70
VHM	40.10	-1.96%	-0.79	4.11
CTG	35.30	-1.67%	-0.77	5.37
MWG	58.10	-2.84%	-0.59	1.46
FPT	143.50	-1.03%	-0.53	1.47

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
IDC	53.80	-1.82%	-0.22	0.33
DHT	104.80	-3.23%	-0.19	0.08
MBS	27.40	-1.79%	-0.19	0.55
SHS	12.90	-1.53%	-0.11	0.81
NVB	8.70	-1.14%	-0.08	1.17

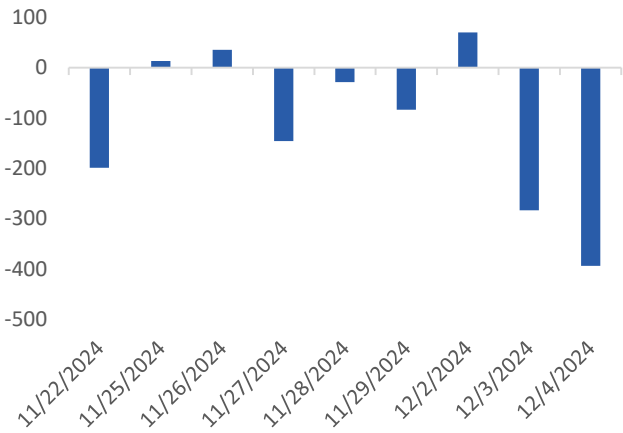
Top 5 losers on the HSX

	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

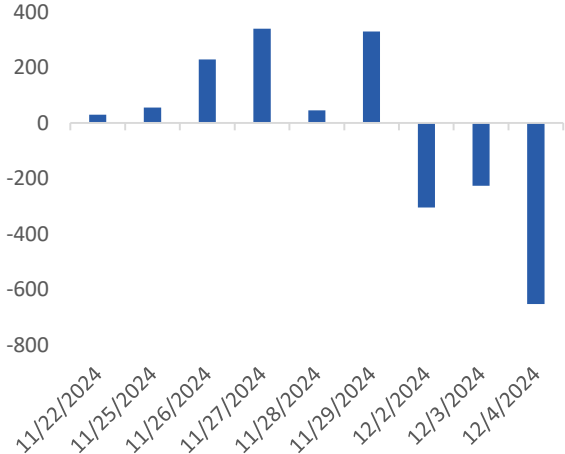
	Close	%	Index pt	Volume (mil)
DAE	12.80	-9.86%	-0.01	0.00
HMR	21.10	-9.83%	-0.04	0.20
CMS	18.40	-9.80%	-0.17	0.61
TXM	6.50	-9.72%	-0.02	0.04
MCO	12.20	-9.63%	-0.02	0.05

Figure 1
Proprietary trading



Source: FiinProX, BSC Research

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 ownershi- p	Link
VCB	Bank	93.5	0.50%	0.7	20,595	4.4	6,194	15.1	105,000	23.2%	Link
BID	Bank	45.2	-2.00%	1.4	10,143	4.3	4,106	11.0	54,578	17.2%	Link
VPB	Bank	19.0	-1.00%	1.0	5,941	6.3	1,663	11.4	23,685	25.2%	Link
TCB	Bank	23.4	-0.80%	1.3	6,511	7.6	3,207	7.3	-	22.3%	Link
MBB	Bank	23.8	-0.40%	1.1	4,988	5.8	4,021	5.9	24,400	23.2%	Link
STB	Bank	32.4	-0.60%	1.4	2,407	7.4	4,640	7.0	31,200	23.4%	Link
CTG	Bank	35.3	-1.70%	1.6	7,471	5.8	4,035	8.7	19,100	26.3%	Link
ACB	Bank	25.0	0.20%	0.8	4,410	4.6	3,638	6.9	42,500	30.0%	Link
SSI	Broker	24.0	-1.00%	1.5	1,860	8.7	1,490	16.1	45,900	36.2%	Link
IDC	IP	53.8	-1.80%	1.0	700	3.5	6,634	8.1	-	24.5%	Link
HPG	Material	26.7	-1.10%	1.0	6,730	13.2	1,905	14.0	23,300	23.7%	Link
HSG	Material	18.2	-2.10%	1.6	447	5.5	828	22.0	79,900	17.3%	Link
VHM	RE	40.1	-2.00%	0.7	6,491	8.2	4,700	8.5	38,900	11.7%	Link
KDH	RE	32.8	-0.20%	1.2	1,309	1.9	522	63.0	44,100	38.1%	Link
NLG	RE	36.9	-2.00%	1.2	560	3.1	793	46.5	46,100	48.8%	Link
DGC	Chemicals	107.9	-1.80%	1.4	1,615	5.7	7,791	13.8	85,000	18.1%	Link
DCM	Fertilizer	36.7	-0.80%	0.9	766	3.1	2,917	12.6	41,000	7.4%	Link
GAS	O&G	68.6	-0.10%	0.5	6,334	0.8	4,728	14.5	36,000	1.9%	Link
PVS	O&G	33.6	-0.60%	1.1	633	2.0	1,919	17.5	110,500	20.8%	Link
PVD	O&G	23.2	-0.40%	1.4	507	2.3	1,211	19.1	45,000	15.6%	Link
POW	Utilities	12.3	-2.80%	0.7	1,135	2.8	597	20.6	38,500	4.1%	Link
VHC	Fishery	72.9	-1.10%	1.3	645	2.9	3,814	19.1	29,000	28.2%	Link
GMD	Logistics	64.7	1.10%	0.7	1,056	1.6	4,315	15.0	14,500	48.6%	Link
VNM	Retail	63.3	-0.90%	0.4	5,214	6.8	4,591	13.8	81,700	51.7%	Link
MSN	Retail	72.1	-0.80%	1.0	4,299	11.7	898	80.3	27,700	28.6%	Link
MWG	Retail	58.1	-2.80%	1.2	3,347	20.3	2,028	28.6	63,800	46.9%	Link
PNJ	Retail	94.2	0.60%	1.0	1,254	2.4	5,960	15.8	83,500	49.0%	Link
DGW	Retail	42.8	0.90%	1.8	366	2.6	1,809	23.6	90,900	25.1%	Link
FPT	Tech	143.5	-1.00%	1.1	8,320	31.7	5,129	28.0	57,000	45.2%	Link
CTR	Tech	126.2	1.00%	1.5	569	8.9	4,640	27.2	108,000	9.4%	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	25.9	-0.60%	1.1	2,973	6.8	4,461	5.8	1.5	19.5%	27.8%
VIB	Bank	18.8	0.30%	1.2	2,213	5.3	2,412	7.8	1.4	4.2%	21.4%
TPB	Bank	15.8	-1.20%	1.4	1,645	5.0	1,840	8.6	1.1	30.0%	14.2%
MSB	Bank	11.2	-1.30%	1.1	1,153	2.6	1,687	6.7	0.8	29.5%	14.9%
EIB	Bank	18.4	-0.50%	0.8	1,351	1.6	1,447	12.7	1.4	2.8%	9.9%
HCM	Broker	27.1	-1.60%	1.8	769	8.5	1,409	19.2	1.9	45.3%	10.6%
VCI	Broker	32.5	-1.50%	1.5	920	6.5	1,419	22.9	2.2	14.4%	9.6%
VND	Broker	13.2	-3.60%	1.5	795	10.7	1,503	8.8	1.0	12.5%	15.0%
BSI	Broker	43.0	-2.20%	1.9	378	0.7	1,732	24.9	1.9	40.0%	9.3%
SHS	Broker	12.9	-1.50%	1.6	413	3.2	1,178	11.0	1.0	3.6%	10.5%
CTD	Const	66.5	-0.60%	1.4	262	1.7	3,361	19.8	0.8	47.1%	3.6%
HHV	Const	11.1	-2.20%	1.5	189	1.1	835	13.3	0.6	7.7%	4.4%
LCG	Const	10.0	-1.00%	1.5	76	0.5	825	12.2	0.8	2.1%	5.7%
SZC	IP	41.2	-0.10%	1.0	292	3.2	1,572	26.2	2.4	2.3%	12.1%
SIP	IP	84.0	0.40%	1.3	697	4.0	5,635	14.9	4.2	3.1%	29.0%
PHR	IP	57.0	-1.20%	0.9	304	0.4	2,858	19.9	2.0	18.5%	12.1%
DIG	RE	20.2	-0.50%	1.6	486	6.5	135	150.0	1.6	4.7%	1.1%
CEO	RE	14.1	0.70%	1.8	300	2.5	316	44.6	1.3	4.8%	2.1%
KBC	IP	28.0	0.00%	1.4	847	4.5	549	51.0	1.2	20.5%	1.7%
VGC	IP	42.6	-0.50%	1.2	753	1.7	1,312	32.5	2.3	3.7%	8.2%
GVR	IP	30.4	-1.80%	1.6	4,784	3.5	851	35.7	2.3	0.5%	6.5%
NKG	Material	18.7	-2.60%	1.6	194	3.7	1,736	10.8	0.8	13.1%	7.4%
BMP	Material	127.2	3.10%	1.1	410	1.7	12,420	10.2	3.5	82.6%	34.6%
IJC	RE	13.4	-0.40%	1.3	200	1.0	729	18.4	1.0	4.6%	6.0%
DXG	RE	16.8	-2.60%	1.4	477	12.7	197	85.2	1.1	15.4%	1.9%
VRE	RE	17.3	-2.30%	1.2	1,549	7.3	1,795	9.6	1.0	20.8%	11.9%
PDR	RE	20.4	-1.40%	1.7	702	5.2	500	40.8	1.6	6.4%	5.0%
DIG	RE	20.2	-0.50%	1.6	486	6.5	135	150.0	1.6	4.7%	1.1%
HUT	Const	15.8	0.00%	0.8	556	0.6	75	210.2	1.6	1.5%	1.7%
C4G	Const	7.9	0.00%	1.0	-	0.1	573	13.8	0.7	0.0%	4.8%
CSV	Chemicals	37.6	-1.80%	1.6	164	2.7	2,122	17.7	2.8	3.8%	15.2%
DHC	Chemicals	35.8	-0.60%	1.0	114	0.2	3,330	10.8	1.5	39.2%	13.3%
DRC	Tyre	28.0	-1.20%	0.8	131	0.4	2,259	12.4	1.7	11.7%	16.5%
PC1	Ultilities	22.8	-1.10%	1.0	322	0.7	1,511	15.1	1.3	13.8%	6.1%
HDG	Ultilities	28.8	0.70%	1.3	382	4.2	2,116	13.6	1.6	15.7%	11.8%
GEX	Ultilities	18.6	-0.30%	1.5	632	3.0	1,207	15.5	1.2	8.3%	7.0%
QTP	Ultilities	14.0	-0.70%	0.6	-	0.1	1,500	9.3	1.2	0.9%	11.2%
PLX	O&G	40.3	0.80%	0.7	2,018	1.0	2,350	17.2	2.0	18.2%	13.8%
BSR	O&G	19.5	0.50%	1.1	-	2.1	966	20.2	1.1	0.7%	13.4%
PLC	O&G	21.3	-0.90%	1.3	68	0.1	611	34.9	1.4	0.5%	4.7%
ANV	Fishery	18.2	-0.80%	1.2	190	1.1	315	57.6	0.8	1.0%	1.2%
PTB	Material	63.3	-1.60%	1.1	167	0.3	4,944	12.8	1.5	24.9%	11.9%
VSC	Logistics	16.0	-0.90%	1.1	180	1.8	737	21.6	1.1	2.4%	7.3%
HAH	Logistics	50.0	4.50%	0.9	239	9.6	3,571	14.0	2.0	7.7%	10.6%
VTP	Logistics	150.9	6.30%	1.4	724	6.3	2,929	51.5	12.3	7.5%	22.8%
DBC	Retail	26.2	-1.90%	1.6	346	3.4	1,604	16.3	1.3	12.1%	5.0%
FRT	Retail	179.0	-0.30%	0.8	961	3.0	775	231.1	13.5	36.1%	11.8%
QNS	Retail	50.8	0.40%	0.5	-	0.8	6,553	7.8	2.0	12.0%	28.7%
TNG	Textile	24.6	-1.60%	1.1	119	1.8	2,427	10.1	1.6	17.2%	14.7%
PVT	Logistics	27.0	-0.60%	1.0	378	1.1	3,130	8.6	1.3	12.6%	14.2%
DPM	Fertilizer	35.8	-0.10%	1.0	552	11.3	1,700	21.1	1.3	8.8%	5.5%
REE	Ultilities	67.2	-0.90%	1.0	1,247	1.3	3,860	17.4	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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BSC Research

Trần Thăng Long

Head of BSC Research

longtt@bsc.com.vn

Macro & Market team

Bùi Nguyên Khoa

Leader of Macro - Market team

khoabn@bsc.com.vn

Vũ Việt Anh

Macro - Market analyst

anhvv@bsc.com.vn

Trần Thanh Tùng

Macro - Market analyst

tungtt@bsc.com.vn

Phạm Thanh Thảo

Macro - Market analyst

thaopt1@bsc.com.vn

Nguyễn Giang Anh

Macro - Market analyst

anhng@bsc.com.vn

Contact Info

Website

<http://www.bsc.com.vn>

Ho Chi Minh City Office

4th, 9th Floor, President Place Tower, 93 Nguyen Cong Tru Street, I District, Ho Chi Minh City, Vietnam.

Tel: (028) 3821 8885

Fax: (028) 3821 8879

BSC Headquarters

8th, 9th floor, ThaiHoldings Tower, 210 Tran Quang Khai street, Hanoi, Vietnam

Tel: (024) 3935 2722

Fax: (024) 2220 0669

For BSC Research

BSC Research Department

hn.ptnc@bsc.com.vn

(+84) 39352722 - Ext 108

For Institutional Clients

Investment Consulting and Brokerage

hn.tvdt.khtc@bsc.com.vn

(024) 39264 659

For Individual Clients

i-Center

i-center@bsc.com.vn

(024) 39264 660