

STOCK MARKET

In today’s trading session, VN-Index fluctuated around the 1,260-1,265 range before falling below the reference level and closing at 1,261.72 points, down over 2 points compared to the previous day. Market breadth tilted to the negative side with 12/18 sectors losing points; of which the Information Technology sector fell the most, followed by the Retail sector, the Tourism and Entertainment sector,...On the other hand, the Communication sector led the gains, climbing nearly 6% compared to the previous session. Foreign investors continued to extend net selling momentum on the HSX, extending a series of 7 consecutive sessions. With declining liquidity, VN-Index may continue to decline in the coming sessions, and fall below the SM50 line. In a

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 17/12/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-2.07** points, closing at **1261.72** points. HNX-Index **-0.15** points, closing at **226.89** points.
- Pulling the index up: **VHM (+0.35)**, **VTP (+0.11)**, **KDH (+0.10)**, **EIB (+0.07)**, **MBB (+0.07)**.
- Pulling the index down: **FPT (-0.67)**, **VPB (-0.29)**, **MWG (-0.25)**, **BID (-0.21)**, **VNM (-0.20)**.
- The matched trade value of VN-Index reached VND **8,698** billion, decreased **-5.51%** compared to the previous session. The total transaction value reached VND 12,064 billion.
- The trading range is 4.85 points. The market had **147** gainers, 78 remaining unchanged, **232** losers.
- Foreign investors' net selling value: VND **-669.13** billion on HOSE, including **FPT (VND -311.25 billion)**, **MWG (VND -80.23 billion)**, **NLG (VND -62.66 billion)**, **HPG (VND -56.54 billion)**, **VRE (VND -50.55 billion)**. Foreign investors were net sellers on HNX with the value of VND **-42.26** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+0.19%**. Positive stocks: **IDC (+1.42%)**, **PVD (+1.27%)**, **VNM (+1.25%)**.
- BSC50 **+0.14%**. Positive stocks: **SIP (+2.79%)**, **GEX (+2.70%)**, **FRT (+2.25%)**.

Indices' performances (Updated 16/12)

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.19%	0.14%	0.10%	0.02%
1 week	-1.23%	-1.60%	-0.88%	-0.34%
1 months	1.96%	2.66%	1.81%	2.09%
3 months	0.23%	2.03%	1.70%	2.94%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,261.72	226.89	92.77
% 1D	-0.16%	-0.07%	0.14%
TV (bil VND)	8,698	564	481
%1D	-5.51%	-1.05%	-0.25%
Foreign (bil VND)	-669.13	-42.26	-57.32

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
SIP	35.32	FPT	-311.25
VHM	33.26	MWG	-80.23
HDB	31.78	NLG	-62.66
DXG	28.60	HPG	-56.54
VIX	26.24	VRE	-50.55

Overview of global stock markets

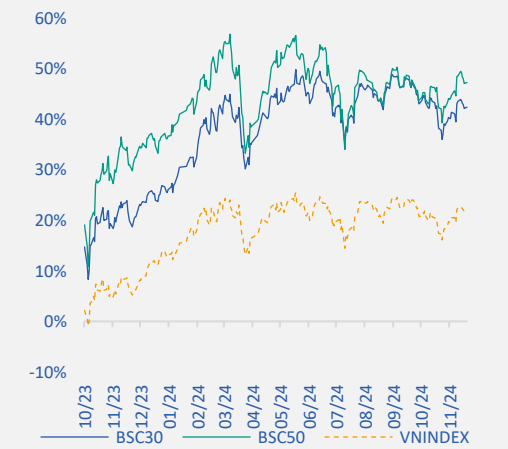
		%D	%W
SPX	6,074	0.38%	0.35%
FTSE100	8,211	-0.62%	-0.84%
Eurostoxx	4,955	0.08%	-0.29%
Shanghai	3,361	-0.73%	-1.79%
Nikkei	39,410	-0.13%	0.11%

Source: Bloomberg

	Close	%
Commodities		
Brent	74	-0.78%
Gold	-	
Exchange rate		
USD/VND	25,485	0.03%
EUR/VND	27,450	0.37%
JPY/VND	168	-0.59%
Interst rates		
10Y-Gov bond rate	2.92%	-0.04%
1M-interbank rate	5.11%	

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)
VHM	41.30	0.85%	0.35	4.11
VTP	141.50	2.54%	0.11	0.12
KDH	35.00	1.16%	0.10	1.01
EIB	19.55	0.77%	0.07	1.86
MBB	24.15	0.21%	0.07	5.31

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	80.00	9.89%	1.08	0.20
L14	36.40	9.97%	0.08	0.03
CDN	32.40	2.86%	0.06	0.10
BAB	12.00	0.84%	0.06	0.90
TMB	78.00	7.14%	0.06	0.02

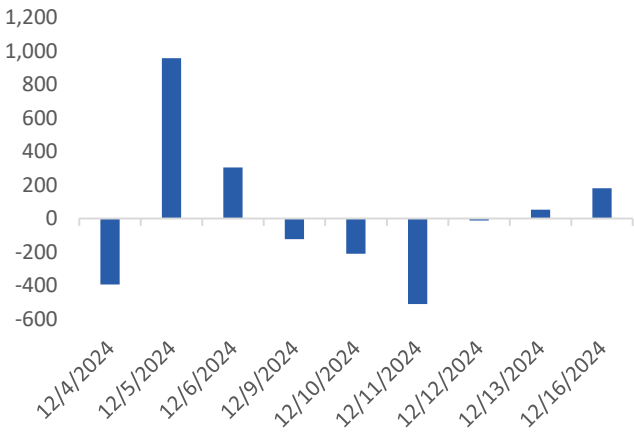
Top 5 gainers on the HSX

	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)
FPT	148.00	-1.27%	-0.67	1.47
VPB	18.95	-0.79%	-0.29	7.93
MWG	60.30	-1.15%	-0.25	1.46
BID	46.60	-0.32%	-0.21	5.70
VNM	64.60	-0.62%	-0.20	2.09

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
PVS	33.10	-1.49%	-0.16	0.48
NVB	8.60	-1.15%	-0.08	1.17
IDC	56.70	-0.53%	-0.07	0.33
BCF	38.60	-5.85%	-0.05	0.03
VIF	17.20	-1.15%	-0.05	0.35

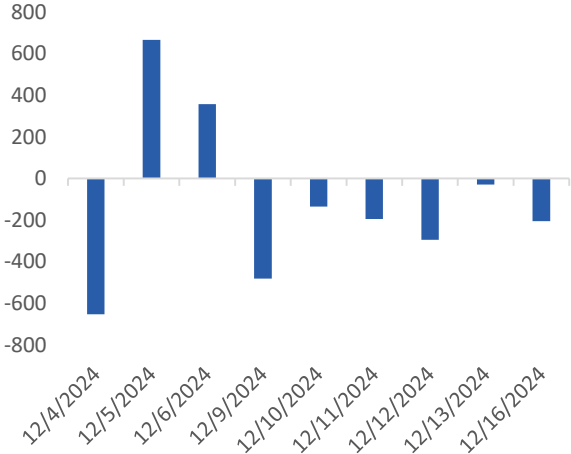
Top 5 losers on the HSX

	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 ownershi- p	Link
VCB	Bank	93.0	-0.10%	0.7	20,464	3.8	6,194	15.0	105,000	23.1%	Link
BID	Bank	46.6	-0.30%	1.4	10,458	4.1	4,106	11.4	54,578	17.0%	Link
VPB	Bank	19.0	-0.80%	1.0	5,919	6.1	1,663	11.4	23,685	25.2%	Link
TCB	Bank	24.2	-0.40%	1.3	6,731	5.1	3,207	7.5	-	22.4%	Link
MBB	Bank	24.2	0.20%	1.2	5,045	3.7	4,021	6.0	24,400	23.2%	Link
STB	Bank	34.1	0.00%	1.4	2,531	5.0	4,640	7.3	31,200	23.4%	Link
CTG	Bank	36.2	0.00%	1.6	7,664	4.9	4,035	9.0	19,100	296.9%	Link
ACB	Bank	25.2	0.20%	0.9	4,432	3.3	3,638	6.9	42,500	30.0%	Link
SSI	Broker	26.0	-0.40%	1.5	2,008	6.3	1,490	17.4	45,900	32.3%	Link
IDC	IP	56.7	-0.50%	1.1	737	1.9	6,634	8.5	-	22.7%	Link
HPG	Material	27.0	0.00%	1.0	6,799	11.5	1,905	14.2	23,300	21.8%	Link
HSG	Material	18.4	-0.50%	1.5	450	2.8	828	22.2	79,900	9.3%	Link
VHM	RE	41.3	0.90%	0.7	6,679	6.0	4,700	8.8	38,900	11.7%	Link
KDH	RE	35.0	1.20%	1.2	1,393	6.0	522	67.1	44,100	36.5%	Link
NLG	RE	37.2	-0.80%	1.2	564	3.6	793	46.9	46,100	47.0%	Link
DGC	Chemicals	116.0	0.40%	1.4	1,734	5.2	7,791	14.9	85,000	17.7%	Link
DCM	Fertilizer	36.4	-0.50%	0.9	759	3.6	2,917	12.5	41,000	6.3%	Link
GAS	O&G	68.0	-0.10%	0.5	6,272	1.1	4,728	14.4	36,000	1.8%	Link
PVS	O&G	33.1	-1.50%	1.1	623	2.9	1,919	17.2	110,500	19.9%	Link
PVD	O&G	23.4	-1.90%	1.4	513	2.9	1,211	19.4	45,000	10.7%	Link
POW	Utilities	12.4	-0.40%	0.6	1,139	1.2	597	20.7	38,500	3.7%	Link
VHC	Fishery	72.7	1.00%	1.2	642	1.2	3,814	19.1	29,000	28.4%	Link
GMD	Logistics	65.5	-0.50%	0.7	1,068	2.6	4,315	15.2	14,500	36.7%	Link
VNM	Retail	64.6	-0.60%	0.4	5,315	3.1	4,591	14.1	81,700	51.6%	Link
MSN	Retail	71.0	-0.10%	1.0	4,229	4.6	898	79.1	27,700	24.0%	Link
MWG	Retail	60.3	-1.10%	1.1	3,471	8.7	2,028	29.7	63,800	46.3%	Link
PNJ	Retail	97.8	-0.40%	1.1	1,301	1.0	5,960	16.4	83,500	49.0%	Link
DGW	Retail	41.7	1.70%	1.8	360	1.1	1,809	23.1	90,900	20.9%	Link
FPT	Tech	148.0	-1.30%	1.1	8,572	34.7	5,129	28.9	57,000	45.6%	Link
CTR	Tech	122.0	1.10%	1.5	549	1.5	4,640	26.3	108,000	10.0%	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	23.8	0.20%	1.1	3,275	8.2	4,461	5.3	1.4	14.1%	27.8%
VIB	Bank	19.2	-0.50%	1.1	2,252	2.6	2,412	8.0	1.4	5.0%	21.4%
TPB	Bank	16.2	0.00%	1.4	1,685	2.7	1,840	8.8	1.2	30.0%	14.2%
MSB	Bank	11.4	-0.90%	1.1	1,172	1.5	1,687	6.8	0.8	27.5%	14.9%
EIB	Bank	19.6	0.80%	0.7	1,434	1.5	1,447	13.5	1.5	2.6%	9.9%
HCM	Broker	29.5	-0.30%	1.8	836	7.1	1,409	20.9	2.1	44.8%	10.6%
VCI	Broker	34.4	-0.60%	1.6	972	3.4	1,419	24.2	2.3	5.2%	9.6%
VND	Broker	13.1	0.00%	1.5	785	1.8	1,503	8.7	1.0	12.2%	15.0%
BSI	Broker	48.2	0.00%	2.0	423	0.5	1,732	27.8	2.2	40.4%	9.3%
SHS	Broker	13.3	0.00%	1.7	426	1.3	1,178	11.3	1.0	3.5%	10.5%
CTD	Const	67.1	0.90%	1.4	264	1.4	3,361	20.0	0.8	49.0%	3.6%
HHV	Const	11.0	-0.90%	1.4	187	0.9	835	13.2	0.6	8.5%	4.4%
LCG	Const	10.0	0.50%	1.4	76	0.3	825	12.2	0.8	2.2%	5.7%
SZC	IP	42.8	-1.20%	1.0	303	1.6	1,572	27.2	2.5	2.3%	12.1%
SIP	IP	84.5	-0.20%	1.3	700	2.7	5,635	15.0	4.2	3.8%	29.0%
PHR	IP	54.4	-0.40%	0.9	290	0.3	2,858	19.0	1.9	18.1%	12.1%
DIG	RE	20.0	-0.70%	1.5	480	5.1	135	148.5	1.6	4.7%	1.1%
CEO	RE	13.9	-0.70%	1.8	296	1.0	316	44.0	1.2	4.8%	2.1%
KBC	IP	28.2	-0.50%	1.4	852	1.6	549	51.3	1.2	18.9%	1.7%
VGC	IP	44.0	-1.50%	1.2	776	3.4	1,312	33.5	2.4	3.6%	8.2%
GVR	IP	31.1	-0.30%	1.6	4,898	1.2	851	36.5	2.4	0.3%	6.5%
NKG	Material	18.3	-2.10%	1.6	190	5.2	1,736	10.5	0.8	7.7%	7.4%
BMP	Material	122.0	-1.60%	1.1	393	1.2	12,420	9.8	3.4	84.0%	34.6%
IJC	RE	13.6	0.40%	1.2	203	0.2	729	18.7	1.0	4.8%	6.0%
DXG	RE	18.0	0.30%	1.5	511	6.0	197	91.3	1.2	18.7%	1.9%
VRE	RE	17.2	-0.90%	1.2	1,534	3.9	1,795	9.6	1.0	19.7%	11.9%
PDR	RE	21.3	-0.90%	1.7	732	3.8	500	42.6	1.7	7.5%	5.0%
DIG	RE	20.0	-0.70%	1.5	480	5.1	135	148.5	1.6	4.7%	1.1%
HUT	Const	15.8	0.00%	0.7	555	0.6	75	210.2	1.6	1.5%	1.7%
C4G	Const	7.8	-1.30%	1.0	-	0.0	573	13.6	0.7	0.0%	4.8%
CSV	Chemicals	41.3	0.20%	1.6	180	3.0	2,122	19.5	3.1	2.9%	15.2%
DHC	Chemicals	34.8	-0.90%	1.0	110	0.2	3,330	10.5	1.4	39.8%	13.3%
DRC	Tyre	29.6	1.70%	0.9	138	1.1	2,259	13.1	1.8	9.2%	16.5%
PC1	Utlilities	22.7	-0.20%	1.1	320	0.7	1,511	15.0	1.3	6.6%	6.1%
HDG	Utlilities	30.3	0.30%	1.3	401	2.4	2,116	14.3	1.6	20.0%	11.8%
GEX	Utlilities	19.2	0.80%	1.4	648	3.4	1,207	15.9	1.2	5.8%	7.0%
QTP	Utlilities	14.3	-0.70%	0.5	-	0.1	1,500	9.5	1.2	0.9%	11.2%
PLX	O&G	38.9	0.50%	0.7	1,946	0.7	2,350	16.6	1.9	17.6%	13.8%
BSR	O&G	21.8	-0.90%	1.1	-	2.6	966	22.6	1.2	0.0%	13.4%
PLC	O&G	21.0	-1.40%	1.2	67	0.0	611	34.4	1.4	0.4%	4.7%
ANV	Fishery	20.4	-2.60%	1.2	214	1.8	315	64.9	1.0	0.0%	1.2%
PTB	Material	62.7	-0.90%	1.1	165	0.1	4,944	12.7	1.5	23.7%	11.9%
VSC	Logistics	15.8	0.00%	1.1	178	0.7	737	21.4	1.1	2.4%	7.3%
HAH	Logistics	49.6	0.20%	0.9	237	2.0	3,571	13.9	2.0	13.5%	10.6%
VTP	Logistics	141.5	2.50%	1.5	678	5.8	2,929	48.3	11.5	7.6%	22.8%
DBC	Retail	27.2	1.50%	1.6	358	3.9	1,604	17.0	1.4	7.2%	5.0%
FRT	Retail	185.6	-0.20%	0.8	996	3.0	775	239.6	14.0	36.4%	11.8%
QNS	Retail	52.0	2.20%	0.5	-	2.1	6,553	7.9	2.0	12.0%	28.7%
TNG	Textile	25.6	2.00%	1.2	124	1.6	2,427	10.5	1.7	17.3%	14.7%
PVT	Logistics	27.2	0.70%	1.0	380	1.1	3,130	8.7	1.3	12.5%	14.2%
DPM	Fertilizer	35.1	-0.40%	1.0	541	2.4	1,700	20.6	1.2	8.9%	5.5%
REE	Utlilities	66.5	0.50%	0.9	1,233	0.7	3,860	17.2	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.

DISCLAIMER

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