

STOCK MARKET

The VN-Index continued to fluctuate around the 1,290 level today and closed at 1,278.84 points, down more than 4 points compared to yesterday. Market breadth leaned negative, with 13 out of 18 sectors declining, led by Basic Resources, followed by Real Estate, etc. On the other hand, the Oil & Gas, Chemicals, and Banking sectors had a positive trading session. In terms of foreign trading, net buying was recorded on the HSX, while there was slight net selling on the HNX. The market is currently showing no clear trend after returning to the previous resistance level, so investors should trade cautiously in the upcoming sessions.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 02/10/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-4.36** points, closing at **1287.84** points. HNX-Index **-1.00** points, closing at **235.05** points.
- Pulling the index up: **VCB (+0.96)**, **TCB (+0.43)**, **TPB (+0.26)**, **GVR (+0.15)**, **PLX (+0.14)**.
- Pulling the index down: **HPG (-0.69)**, **CTG (-0.65)**, **VPB (-0.39)**, **HDB (-0.32)**, **SAB (-0.28)**.
- The matched trade value of VN-Index reached VND **14,898 billion**, decreased **-26.67%** compared to the previous session. The total transaction value reached VND 17,696 billion.
- The trading range is 8.55 points. The market had **96** gainers, 73 remaining unchanged, **299** losers.
- Foreign investors' net buying value: VND **252.48 billion** on HOSE, including **TCB (VND 259.06 billion)**, **PNJ (VND 159.00 billion)**, **FPT (VND 66.80 billion)**, **VCB (VND 48.81 billion)**, **VHM (VND 46.72 billion)**. Foreign investors were net sellers on HNX with the value of VND **-0.04** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+0.08%**. Positive stocks: **TCB (+1.86%)**, **VHM (+1.52%)**, **HPG (+1.52%)**.
- BSC50 **+0.38%**. Positive stocks: **BSI (+4.63%)**, **SHS (+3.85%)**, **HHV (+2.88%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.08%	0.38%	0.33%	0.47%
1 week	0.68%	1.16%	0.86%	1.63%
1 months	1.52%	1.59%	0.96%	1.52%
3 months	-2.88%	-5.86%	-2.23%	-0.82%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,287.84	235.05	93.28
% 1D	-0.34%	-0.42%	0.00%
TV (bil VND)	14,898	1,052	598
%1D	-26.67%	-26.59%	-18.06%
Foreign (bil VND)	252.48	-0.04	-14.33

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
TCB	259.06	VPB	-74.26
PNJ	159.00	HDB	-61.60
FPT	66.80	CTG	-47.78
VCB	48.81	HPG	-36.56
VHM	46.72	DPM	-34.01

Overview of global stock markets

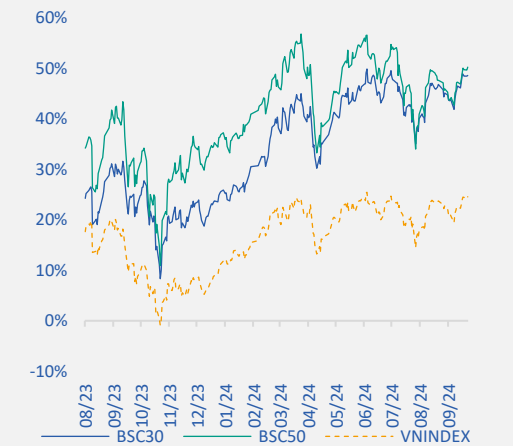
		%D	%W
SPX	5,709	-0.93%	-0.42%
FTSE100	8,284	0.09%	0.19%
Eurostoxx	4,967	0.39%	1.01%
Shanghai	3,337	8.06%	21.37%
Nikkei	37,794	-2.22%	-0.31%

Source: Bloomberg

	Close	%
Commodities		
Brent	74	-0.07%
Gold	2,660	-0.76%
Exchange rate		
USD/VND	24,820	0.20%
EUR/VND	28,047	-0.25%
JPY/VND	174	
Interst rates		
10Y-Gov bond rate	2.69%	
1M-interbank rate	4.26%	

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)
VCB	92.70	0.76%	0.96	5.59
TCB	24.90	1.01%	0.43	7.05
TPB	17.50	2.34%	0.26	2.64
GVR	36.15	0.42%	0.15	4.00
PLX	44.95	1.01%	0.14	1.27

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
MBS	32.10	1.58%	0.20	0.55
PVS	40.80	0.99%	0.14	0.48
BVS	44.50	2.53%	0.06	0.07
VNT	42.00	9.95%	0.05	0.02
PGS	33.80	2.74%	0.03	0.05

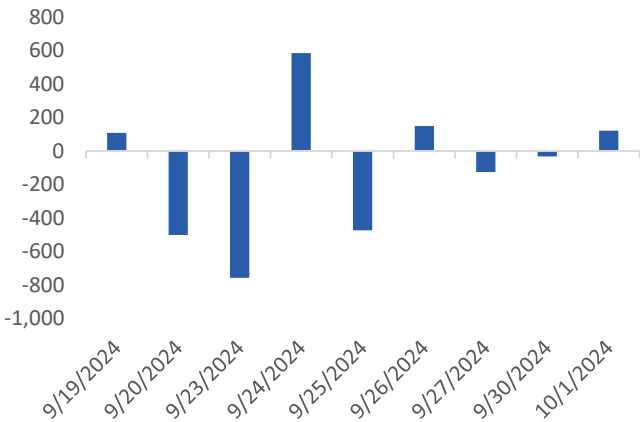
Top 5 gainers on the HSX

	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)
HPG	26.30	-1.68%	-0.69	6.40
CTG	36.00	-1.37%	-0.65	5.37
VPB	19.70	-1.01%	-0.39	7.93
HDB	27.55	-1.61%	-0.32	2.91
SAB	56.90	-1.56%	-0.28	1.28

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
CEO	15.70	-2.48%	-0.15	0.54
NTP	59.20	-2.31%	-0.13	0.13
BAB	12.10	-1.63%	-0.13	0.90
VCS	63.70	-1.24%	-0.09	0.16
NVB	9.10	-2.15%	-0.08	0.56

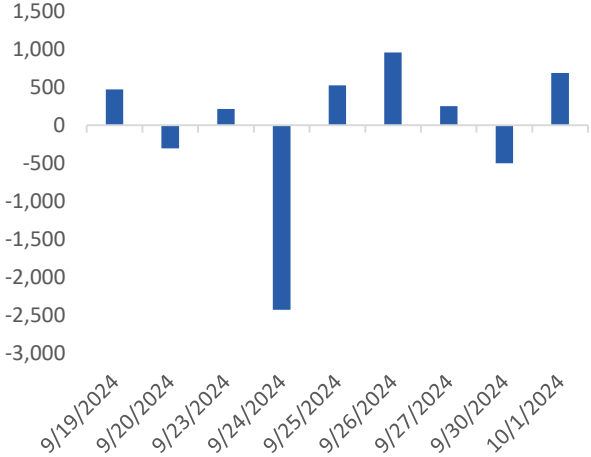
Top 5 losers on the HSX

	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	92.7	0.80%	0.7	21,100	5.2	5,962	15.5	105,000	23.3%	Link
BID	Bank	49.8	0.20%	1.1	11,561	3.7	4,006	12.4	54,578	17.2%	Link
VPB	Bank	19.7	-1.00%	1.0	6,365	30.1	1,461	13.5	23,685	26.1%	Link
TCB	Bank	24.9	1.00%	1.3	7,144	28.6	3,047	8.2	-	20.9%	Link
MBB	Bank	25.7	0.20%	1.0	5,554	13.4	4,018	6.4	24,400	23.2%	Link
STB	Bank	33.6	0.10%	1.2	2,576	15.6	4,340	7.7	31,200	22.9%	Link
CTG	Bank	36.0	-1.40%	1.3	7,873	16.5	3,782	9.5	19,100	26.3%	Link
ACB	Bank	25.8	0.20%	0.8	4,693	10.6	3,676	7.0	42,500	30.0%	Link
SSI	Broker	27.6	-0.70%	1.4	2,205	13.3	1,882	14.7	45,900	41.3%	Link
IDC	IP	57.5	-0.20%	1.1	773	2.4	5,573	10.3	-	24.5%	Link
HPG	Material	26.3	-1.70%	1.2	6,851	22.8	1,746	15.1	23,300	23.7%	Link
HSG	Material	21.3	0.00%	1.6	534	12.5	1,844	11.5	79,900	17.3%	Link
VHM	RE	43.4	-0.10%	0.9	7,696	14.1	5,350	8.1	38,900	14.2%	Link
KDH	RE	38.6	-1.80%	1.2	1,430	4.9	765	50.4	44,100	38.1%	Link
NLG	RE	41.0	-1.40%	1.2	642	1.9	1,102	37.2	46,100	48.8%	Link
DGC	Chemicals	116.0	0.00%	1.5	1,794	8.5	7,898	14.7	85,000	18.1%	Link
DCM	Fertilizer	38.4	0.50%	1.2	829	4.6	2,828	13.6	41,000	7.4%	Link
GAS	O&G	72.9	-0.10%	0.6	6,955	3.1	4,760	15.3	36,000	1.9%	Link
PVS	O&G	40.8	1.00%	1.0	794	5.4	1,932	21.1	110,500	22.1%	Link
PVD	O&G	27.6	0.50%	1.4	624	4.4	1,155	23.9	45,000	15.6%	Link
POW	Utilities	13.2	-0.40%	0.6	1,254	2.1	463	28.4	38,500	4.1%	Link
VHC	Fishery	70.1	-1.30%	1.3	641	1.6	3,234	21.7	29,000	29.8%	Link
GMD	Logistics	77.8	0.50%	0.9	984	2.6	4,054	19.2	14,500	48.6%	Link
VNM	Retail	70.1	0.00%	0.6	5,966	6.1	4,633	15.1	81,700	51.5%	Link
MSN	Retail	76.0	-0.80%	1.2	4,683	7.3	466	163.0	27,700	28.6%	Link
MWG	Retail	67.4	-0.60%	1.3	4,013	19.6	1,507	44.7	63,800	46.9%	Link
PNJ	Retail	98.0	1.00%	1.0	1,349	7.3	6,132	16.0	83,500	49.0%	Link
DGW	Retail	46.6	-1.70%	1.8	412	2.1	2,236	20.8	90,900	25.1%	Link
FPT	Tech	135.4	-0.40%	1.1	8,053	9.5	4,890	27.7	57,000	45.2%	Link
CTR	Tech	126.8	0.40%	1.4	591	0.9	4,590	27.6	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 ownershi- p	ROE (%)
HDB	Bank	27.6	-1.60%	0.9	3,268	10.1	4,137	6.7	1.7	19.5%	27.8%
VIB	Bank	19.6	-1.30%	1.1	2,372	6.7	3,048	6.4	1.3	20.5%	21.4%
TPB	Bank	17.5	2.30%	1.3	1,883	23.6	2,154	8.1	1.1	28.4%	14.2%
MSB	Bank	13.0	0.40%	1.1	1,382	7.2	2,366	5.5	0.8	29.5%	14.9%
EIB	Bank	19.2	1.60%	0.7	1,456	7.0	1,273	15.1	1.4	2.8%	9.9%
HCM	Broker	30.6	-1.10%	1.6	879	13.9	1,397	21.9	2.0	45.3%	10.6%
VCI	Broker	36.4	-0.30%	1.7	852	12.0	1,763	20.7	1.8	20.1%	9.6%
VND	Broker	15.1	-2.30%	1.5	936	9.7	1,591	9.5	1.3	13.5%	15.0%
BSI	Broker	51.6	-0.80%	1.8	469	2.0	2,165	23.8	2.1	40.0%	9.3%
SHS	Broker	16.2	0.00%	1.7	536	6.2	1,338	12.1	1.2	8.9%	10.5%
CTD	Const	62.6	-1.70%	1.3	255	2.1	2,996	20.9	0.7	47.1%	3.6%
HHV	Const	12.2	-2.40%	1.6	215	2.5	869	14.0	0.6	7.7%	4.4%
LCG	Const	11.0	-2.20%	1.5	86	0.9	766	14.4	0.8	2.1%	5.7%
SZC	IP	37.2	-1.30%	1.0	272	1.3	1,549	24.0	2.3	3.2%	12.1%
SIP	IP	73.0	1.40%	1.4	626	0.6	5,931	12.3	3.4	2.0%	29.0%
PHR	IP	60.1	0.20%	0.9	332	0.5	3,028	19.8	2.1	18.5%	12.1%
DIG	RE	22.4	-2.20%	1.8	556	18.7	151	148.4	1.8	4.7%	1.1%
CEO	RE	15.7	-2.50%	1.9	346	3.6	318	49.3	1.3	4.8%	2.1%
KBC	IP	27.6	-2.10%	1.5	863	4.6	300	92.0	1.2	20.5%	1.7%
VGC	IP	43.5	-1.50%	1.2	794	1.8	1,776	24.5	2.4	4.7%	8.2%
GVR	IP	36.2	0.40%	1.4	5,889	3.8	693	52.1	2.8	0.5%	6.5%
NKG	Material	22.1	0.00%	1.6	237	4.5	1,580	14.0	1.0	13.1%	7.4%
BMP	Material	115.5	-1.30%	1.2	385	1.3	11,420	10.1	3.6	82.6%	34.6%
IJC	RE	13.6	-1.10%	1.4	209	0.9	683	19.9	1.0	4.6%	6.0%
DXG	RE	15.9	-4.80%	1.6	467	11.9	249	63.9	1.1	15.4%	1.9%
VRE	RE	19.2	-1.30%	1.3	1,772	4.0	1,975	9.7	1.1	22.2%	11.9%
PDR	RE	21.2	-5.60%	1.8	754	16.1	557	38.0	1.7	6.4%	5.0%
DIG	RE	22.4	-2.20%	1.8	556	18.7	151	148.4	1.8	4.7%	1.1%
HUT	Const	16.4	-0.60%	1.2	596	0.9	64	258.4	1.7	1.5%	1.7%
C4G	Const	9.0	0.00%	1.2	-	0.1	503	17.9	0.8	0.0%	4.8%
CSV	Chemicals	38.6	-0.60%	2.0	174	1.6	4,748	8.1	1.1	3.8%	15.2%
DHC	Chemicals	37.3	-0.80%	1.2	122	0.1	3,067	12.2	1.6	39.2%	13.3%
DRC	Tyre	31.2	-1.00%	0.8	151	0.9	2,509	12.5	2.0	11.7%	16.5%
PC1	Utilities	28.4	-0.90%	1.3	360	2.0	1,203	23.7	1.7	13.8%	6.1%
HDG	Utilities	28.0	-0.90%	1.3	383	3.3	1,958	14.3	1.6	15.7%	11.8%
GEX	Utilities	21.4	-1.40%	1.5	751	5.3	1,245	17.2	1.4	8.3%	7.0%
QTP	Utilities	14.1	-0.70%	0.6	-	0.1	1,357	10.4	1.2	1.2%	11.2%
PLX	O&G	45.0	1.00%	0.9	2,326	1.8	2,879	15.6	2.2	18.2%	13.8%
BSR	O&G	24.3	1.20%	1.1	-	7.4	2,408	10.1	1.3	0.7%	13.4%
PLC	O&G	24.6	-1.20%	1.5	81	0.1	734	33.5	1.6	0.5%	4.7%
ANV	Fishery	33.4	0.00%	1.5	181	1.2	114	294.2	1.6	1.0%	1.2%
PTB	Material	60.8	0.80%	0.8	166	0.3	4,899	12.4	1.4	24.9%	11.9%
VSC	Logistics	17.4	-0.90%	1.3	204	1.2	713	24.5	1.1	3.1%	7.3%
HAH	Logistics	41.3	0.10%	1.3	204	4.3	2,800	14.8	1.8	7.7%	10.6%
VTP	Logistics	77.4	-1.70%	1.6	384	2.3	2,893	26.8	5.9	6.9%	22.8%
DBC	Retail	29.6	0.30%	1.5	403	6.6	979	30.2	1.5	12.1%	5.0%
FRT	Retail	177.0	-0.10%	0.7	982	2.6	(414)	-427.1	14.5	36.1%	11.8%
QNS	Retail	48.7	0.40%	0.6	-	0.7	6,678	7.3	2.0	13.8%	28.7%
TNG	Textile	26.0	-0.80%	1.2	130	1.8	2,254	11.5	1.6	19.5%	14.7%
PVT	Logistics	28.3	0.70%	1.1	410	1.5	2,805	10.1	1.4	13.2%	14.2%
DPM	Fertilizer	35.6	0.30%	1.2	568	3.8	1,703	20.9	1.2	8.8%	5.5%
REE	Utilities	67.4	1.00%	1.1	1,293	1.8	3,804	17.7	1.8	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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