

STOCK MARKET

VN-Index once again failed to conquer the threshold of 1,300. The index was pushed down by selling pressure to end the session at 1,278.1 points after rebounding to this threshold, down nearly 10 points compared to yesterday's session. Market breadth tilted to the negative side with 18/18 industries decreasing, of which the Real Estate industry decreased the most, followed by the Automobile and spare parts industry, Chemicals,... Regarding foreign transactions, today This block is net buying on HSX and net selling on HNX. The market today returned to a strong struggle at the threshold of 1,280. Investors should trade carefully in the coming sessions because the accumulation trend to bounce off the 1,300 threshold has weakened.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 03/10/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-9.74** points, closing at **1278.1** points. HNX-Index **-1.70** points, closing at **233.35** points.
- Pulling the index up: **VPB (+0.59)**, **OCB (+0.51)**, **CTG (+0.27)**, **SSB (+0.18)**, **VNM (+0.10)**.
- Pulling the index down: **VHM (-1.84)**, **TCB (-0.93)**, **VIC (-0.64)**, **GVR (-0.58)**, **FPT (-0.49)**.
- The matched trade value of VN-Index reached VND **21,978** billion, increased 47.44% compared to the previous session. The total transaction value reached VND 23,208 billion.
- The trading range is 22.85 points. The market had **96** gainers, 73 remaining unchanged, **299** losers.
- Foreign investors' net buying value: VND **574.90** billion on HOSE, including **FUEVFDND (VND 472.65 billion)**, **STB (VND 140.97 billion)**, **VHM (VND 118.02 billion)**, **TCB (VND 87.54 billion)**, **VNM (VND 65.14 billion)**. Foreign investors were net sellers on HNX with the value of VND **-48.63** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.23%**. Positive stocks: **PNJ (+1.03%)**, **TCB (+1.01%)**, **PVS (+0.99%)**.
- BSC50 **-0.71%**. Positive stocks: **TPB (+2.34%)**, **EIB (+1.59%)**, **SIP (+1.39%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.23%	-0.71%	-0.34%	-0.32%
1 week	-0.22%	0.66%	0.37%	1.10%
1 months	2.19%	1.42%	1.28%	1.95%
3 months	-1.86%	-4.30%	-1.14%	0.57%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,278.10	233.35	92.68
% 1D	-0.76%	-0.72%	-0.64%
TV (bil VND)	21,978	1,308	757
%1D	47.44%	24.35%	26.52%
Foreign (bil VND)	574.90	-48.63	-48.00

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FUEVFDND	472.65	OCB	-58.61
STB	140.97	FPT	-56.31
VHM	118.02	MSB	-42.79
TCB	87.54	VRE	-29.97
VNM	65.14	DPM	-26.69

Overview of global stock markets

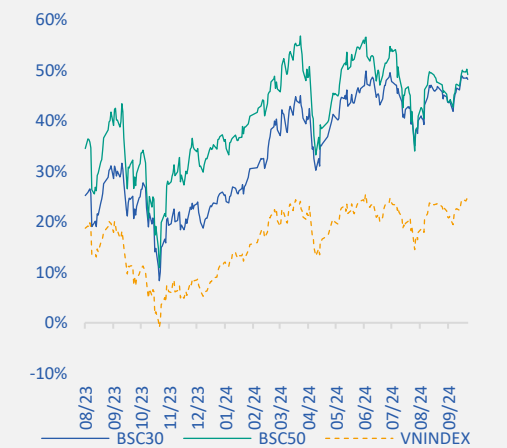
		%D	%W
SPX	5,710	0.01%	-0.22%
FTSE100	8,301	0.13%	0.20%
Eurostoxx	4,922	-0.60%	-1.75%
Shanghai	3,337	8.06%	21.37%
Nikkei	38,553	2.01%	-0.70%

Source: Bloomberg

	Close	%
Commodities		
Brent	75	-0.15%
Gold	2,660	-0.64%
Exchange rate		
USD/VND	24,905	0.34%
EUR/VND	28,038	-0.10%
JPY/VND	172	-1.71%
Interest 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)
VPB	20.00	1.52%	0.59	7.93
OCB	12.75	6.69%	0.51	2.47
CTG	36.20	0.56%	0.27	5.37
SSB	17.80	1.42%	0.18	2.84
VNM	70.30	0.29%	0.10	2.09

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PTI	33.00	6.80%	0.13	0.08
NVB	9.30	2.20%	0.08	0.56
NTP	59.40	0.34%	0.02	0.13
SGC	115.00	2.22%	0.01	0.01
TSB	47.50	5.32%	0.01	0.01

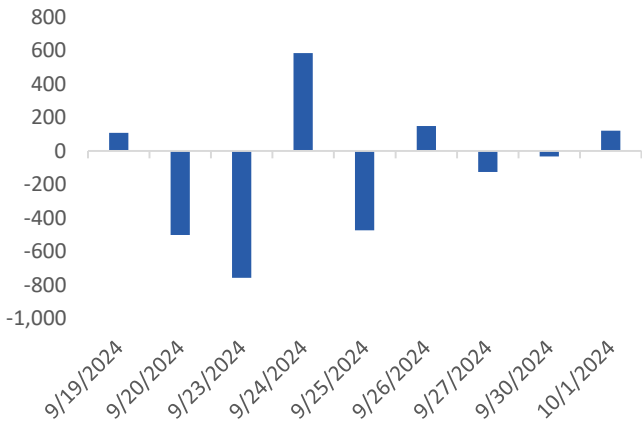
Top 5 gainers on the HSX

	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)
VHM	41.60	-4.15%	-1.84	4.35
TCB	24.35	-2.21%	-0.93	7.05
VIC	41.35	-1.66%	-0.64	3.82
GVR	35.55	-1.66%	-0.58	4.00
FPT	134.00	-1.03%	-0.49	1.46

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
VCS	62.00	-2.67%	-0.19	0.16
KSV	53.60	-2.37%	-0.18	0.20
SHS	15.90	-1.85%	-0.17	0.81
MBS	31.70	-1.25%	-0.16	0.55
PVI	45.20	-1.95%	-0.15	0.23

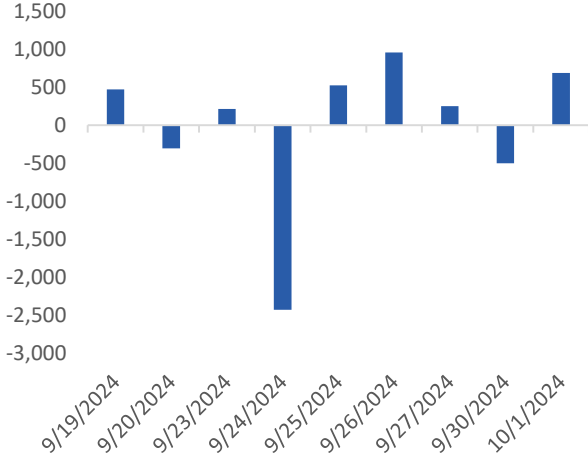
Top 5 losers on the HSX

	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	92.6	-0.10%	0.7	21,043	6.4	5,962	15.5	105,000	23.3%	<a href="#">Link</a>
BID	Bank	49.5	-0.60%	1.1	11,473	7.1	4,006	12.4	54,578	17.2%	<a href="#">Link</a>
VPB	Bank	20.0	1.50%	1.0	6,452	40.6	1,461	13.7	23,685	26.1%	<a href="#">Link</a>
TCB	Bank	24.4	-2.20%	1.3	6,975	29.5	3,047	8.0	-	20.9%	<a href="#">Link</a>
MBB	Bank	25.5	-0.80%	1.0	5,502	21.8	4,018	6.3	24,400	23.2%	<a href="#">Link</a>
STB	Bank	33.8	0.60%	1.2	2,587	26.2	4,340	7.8	31,200	22.9%	<a href="#">Link</a>
CTG	Bank	36.2	0.60%	1.3	7,904	13.4	3,782	9.6	19,100	26.3%	<a href="#">Link</a>
ACB	Bank	25.7	-0.40%	0.8	4,667	15.5	3,676	7.0	42,500	30.0%	<a href="#">Link</a>
SSI	Broker	27.6	-0.20%	1.4	2,197	14.4	1,882	14.6	45,900	41.3%	<a href="#">Link</a>
IDC	IP	57.2	-0.50%	1.1	768	2.4	5,573	10.3	-	24.5%	<a href="#">Link</a>
HPG	Material	26.2	-0.40%	1.2	6,814	28.5	1,746	15.0	23,300	23.7%	<a href="#">Link</a>
HSG	Material	20.8	-2.30%	1.6	521	18.0	1,844	11.3	79,900	17.3%	<a href="#">Link</a>
VHM	RE	41.6	-4.10%	0.9	7,365	45.5	5,350	7.8	38,900	14.2%	<a href="#">Link</a>
KDH	RE	37.4	-3.10%	1.2	1,383	10.2	765	48.9	44,100	38.1%	<a href="#">Link</a>
NLG	RE	40.2	-2.00%	1.2	629	3.2	1,102	36.5	46,100	48.8%	<a href="#">Link</a>
DGC	Chemicals	114.6	-1.20%	1.5	1,770	8.5	7,898	14.5	85,000	18.1%	<a href="#">Link</a>
DCM	Fertilizer	37.8	-1.60%	1.2	815	7.6	2,828	13.4	41,000	7.4%	<a href="#">Link</a>
GAS	O&G	72.5	-0.50%	0.6	6,906	2.3	4,760	15.2	36,000	1.9%	<a href="#">Link</a>
PVS	O&G	40.8	0.00%	1.0	793	4.7	1,932	21.1	110,500	22.1%	<a href="#">Link</a>
PVD	O&G	27.2	-1.10%	1.4	616	5.4	1,155	23.6	45,000	15.6%	<a href="#">Link</a>
POW	Utilities	12.8	-2.70%	0.6	1,219	4.1	463	27.6	38,500	4.1%	<a href="#">Link</a>
VHC	Fishery	69.8	-0.40%	1.3	637	1.1	3,234	21.6	29,000	29.8%	<a href="#">Link</a>
GMD	Logistics	77.4	-0.50%	0.9	977	1.5	4,054	19.1	14,500	48.6%	<a href="#">Link</a>
VNM	Retail	70.3	0.30%	0.6	5,974	8.4	4,633	15.2	81,700	51.5%	<a href="#">Link</a>
MSN	Retail	76.0	0.00%	1.2	4,675	22.1	466	163.0	27,700	28.6%	<a href="#">Link</a>
MWG	Retail	66.3	-1.60%	1.3	3,941	39.7	1,507	44.0	63,800	46.9%	<a href="#">Link</a>
PNJ	Retail	97.2	-0.80%	1.0	1,335	2.8	6,132	15.9	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	46.2	-0.90%	1.8	408	2.6	2,236	20.7	90,900	25.1%	<a href="#">Link</a>
FPT	Tech	134.0	-1.00%	1.1	7,957	12.5	4,890	27.4	57,000	45.2%	<a href="#">Link</a>
CTR	Tech	126.2	-0.50%	1.4	587	1.0	4,590	27.5	108,000	9.4%	<a href="#">Link</a>

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	0.40%	0.9	3,274	10.6	4,137	6.7	1.7	19.5%	27.8%
VIB	Bank	19.2	-1.50%	1.1	2,332	19.8	3,048	6.3	1.3	20.5%	21.4%
TPB	Bank	17.5	0.00%	1.3	1,880	36.7	2,154	8.1	1.1	28.4%	14.2%
MSB	Bank	12.8	-1.50%	1.1	1,358	12.5	2,366	5.4	0.8	29.5%	14.9%
EIB	Bank	19.3	0.50%	0.7	1,462	12.3	1,273	15.2	1.4	2.8%	9.9%
HCM	Broker	30.4	-1.00%	1.6	869	14.8	1,397	21.7	2.0	45.3%	10.6%
VCI	Broker	36.6	0.40%	1.7	854	13.5	1,763	20.7	1.8	20.1%	9.6%
VND	Broker	14.8	-2.00%	1.5	916	11.8	1,591	9.3	1.3	13.5%	15.0%
BSI	Broker	50.9	-1.40%	1.8	462	3.0	2,165	23.5	2.1	40.0%	9.3%
SHS	Broker	15.9	-1.90%	1.7	526	10.1	1,338	11.9	1.2	8.9%	10.5%
CTD	Const	61.7	-1.40%	1.3	251	2.1	2,996	20.6	0.7	47.1%	3.6%
HHV	Const	12.0	-2.00%	1.6	210	4.7	869	13.7	0.6	7.7%	4.4%
LCG	Const	10.7	-2.70%	1.5	84	1.7	766	14.0	0.8	2.1%	5.7%
SZC	IP	36.1	-2.80%	1.0	264	2.5	1,549	23.3	2.2	3.2%	12.1%
SIP	IP	72.2	-1.10%	1.4	618	0.9	5,931	12.2	3.4	2.0%	29.0%
PHR	IP	58.7	-2.30%	0.9	323	0.2	3,028	19.4	2.1	18.5%	12.1%
DIG	RE	21.9	-2.20%	1.8	543	13.9	151	145.1	1.7	4.7%	1.1%
CEO	RE	15.4	-1.90%	1.9	338	4.0	318	48.4	1.3	4.8%	2.1%
KBC	IP	27.2	-1.60%	1.5	847	4.6	300	90.5	1.1	20.5%	1.7%
VGC	IP	43.4	-0.30%	1.2	790	2.5	1,776	24.4	2.4	4.7%	8.2%
GVR	IP	35.6	-1.70%	1.4	5,782	5.0	693	51.3	2.8	0.5%	6.5%
NKG	Material	21.6	-2.30%	1.6	231	6.3	1,580	13.7	1.0	13.1%	7.4%
BMP	Material	116.2	0.60%	1.2	387	0.8	11,420	10.2	3.6	82.6%	34.6%
IJC	RE	13.4	-1.80%	1.4	205	1.0	683	19.5	1.0	4.6%	6.0%
DXG	RE	15.4	-3.50%	1.6	450	18.0	249	61.7	1.0	15.4%	1.9%
VRE	RE	18.6	-2.60%	1.3	1,723	11.0	1,975	9.4	1.1	22.2%	11.9%
PDR	RE	20.6	-2.80%	1.8	731	15.1	557	37.0	1.6	6.4%	5.0%
DIG	RE	21.9	-2.20%	1.8	543	13.9	151	145.1	1.7	4.7%	1.1%
HUT	Const	16.3	-0.60%	1.2	592	2.1	64	256.9	1.7	1.5%	1.7%
C4G	Const	8.9	-1.10%	1.2	-	0.2	503	17.7	0.8	0.0%	4.8%
CSV	Chemicals	38.2	-1.00%	2.0	172	2.8	4,748	8.0	1.1	3.8%	15.2%
DHC	Chemicals	37.5	0.50%	1.2	123	0.3	3,067	12.2	1.6	39.2%	13.3%
DRC	Tyre	29.6	-5.40%	0.8	143	2.2	2,509	11.8	1.9	11.7%	16.5%
PC1	Utilities	27.8	-2.10%	1.3	352	4.5	1,203	23.2	1.6	13.8%	6.1%
HDG	Utilities	27.3	-2.30%	1.3	373	5.9	1,958	13.9	1.5	15.7%	11.8%
GEX	Utilities	21.2	-1.20%	1.5	741	6.4	1,245	17.0	1.4	8.3%	7.0%
QTP	Utilities	14.0	-0.70%	0.6	-	0.1	1,357	10.3	1.1	1.2%	11.2%
PLX	O&G	44.4	-1.20%	0.9	2,294	2.4	2,879	15.4	2.2	18.2%	13.8%
BSR	O&G	23.9	-1.60%	1.1	-	7.1	2,408	9.9	1.3	0.7%	13.4%
PLC	O&G	24.5	-0.40%	1.5	80	0.1	734	33.4	1.6	0.5%	4.7%
ANV	Fishery	33.7	0.70%	1.5	182	2.1	114	296.4	1.6	1.0%	1.2%
PTB	Material	60.4	-0.70%	0.8	164	0.4	4,899	12.3	1.4	24.9%	11.9%
VSC	Logistics	17.2	-1.70%	1.3	200	1.5	713	24.1	1.1	3.1%	7.3%
HAH	Logistics	40.8	-1.20%	1.3	201	4.5	2,800	14.6	1.8	7.7%	10.6%
VTP	Logistics	75.8	-2.10%	1.6	375	2.9	2,893	26.2	5.8	6.9%	22.8%
DBC	Retail	29.0	-2.00%	1.5	395	7.9	979	29.6	1.4	12.1%	5.0%
FRT	Retail	176.0	-0.60%	0.7	975	3.1	(414)	-424.7	14.4	36.1%	11.8%
QNS	Retail	48.3	-0.80%	0.6	-	0.2	6,678	7.2	1.9	13.8%	28.7%
TNG	Textile	25.4	-2.30%	1.2	127	3.4	2,254	11.3	1.6	19.5%	14.7%
PVT	Logistics	27.8	-1.90%	1.1	402	2.4	2,805	9.9	1.4	13.2%	14.2%
DPM	Fertilizer	35.2	-1.40%	1.2	559	6.5	1,703	20.6	1.2	8.8%	5.5%
REE	Utilities	66.8	-0.90%	1.1	1,279	1.3	3,804	17.6	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.

DISCLAIMER

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