

STOCK MARKET

The VN-Index continued to trade around 1,365 today and closed at 1,365.67 points, virtually unchanged from yesterday. Market breadth was fairly balanced, with 10 of the 18 sectors in positive territory. Most sectors saw little movement, except for Media, which fell by more than 1%. Foreign investors were net sellers across all three exchanges—HSX, HNX, and UPCOM—today. The VN-Index remains in a consolidation phase around the 1,365 level; this trend may persist in the short term, after which the market will need a decisive candlestick and supporting volume to break out.

FUTURES CONTRACTS

Futures contracts decreased according to the movement of VN30, except for VN30F2509, VN30F2512.

COVERED WARRANTS

During the trading session on 26/06/2025, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **-1.08** points, closing at **1365.67** points. HNX-Index **+0.04** points, closing at **227.7** points.
- Pulling the index up: **MSN (+0.62)**, **GAS (+0.55)**, **MBB (+0.43)**, **TCB (+0.42)**, **CTG (+0.25)**.
- Pulling the index down: **VHM (-1.78)**, **VIC (-0.72)**, **VCB (-0.39)**, **GVR (-0.28)**, **BID (-0.25)**.
- The matched trade value of VN-Index reached VND **14,961** billion, decreased **-18.31%** compared to the previous session. The total transaction value reached VND 19,188 billion.
- The trading range is 11.96 points. The market had **141** gainers, 59 remaining unchanged, **155** losers.
- Foreign investors' net selling value: VND **-271.34** billion on HOSE, including **FPT (VND -167.45 billion)**, **HPG (VND -139.05 billion)**, **STB (VND -103.38 billion)**, **VNM (VND -67.22 billion)**, **KDH (VND -60.62 billion)**. Foreign investors were net sellers on HNX with the value of VND **-47.10** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.05%**. Positive stocks: **KBC (+2.72%)**, **MSN (+2.42%)**, **MBB (+1.17%)**.
- BSC50 **+0.34%**. Positive stocks: **DGW (+4.78%)**, **SZC (+4.27%)**, **ANV (+3.29%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.05%	0.34%	-0.08%	-0.12%
1 week	-0.11%	1.17%	1.01%	1.69%
1 months	3.84%	1.99%	1.93%	2.53%
3 months	1.56%	0.39%	3.66%	6.52%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,365.67	227.70	100.06
% 1D	-0.08%	0.02%	0.12%
TV (VND bn)	14,961	1,116	361
%1D	-18.31%	-21.12%	-35.78%
Foreign (VND bn)	-271.34	-47.10	-5.50

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
GEX	250.45	FPT	-167.45
SSI	88.52	HPG	-139.05
CTG	77.74	STB	-103.38
DGW	54.51	VNM	-67.22
MSN	40.86	KDH	-60.62

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	6,092	0.00%	1.83%
FTSE100	8,729	0.12%	-0.71%
Eurostoxx	5,261	0.01%	0.89%
Shanghai	3,448	-0.22%	2.57%
Nikkei	39,585	1.65%	2.86%

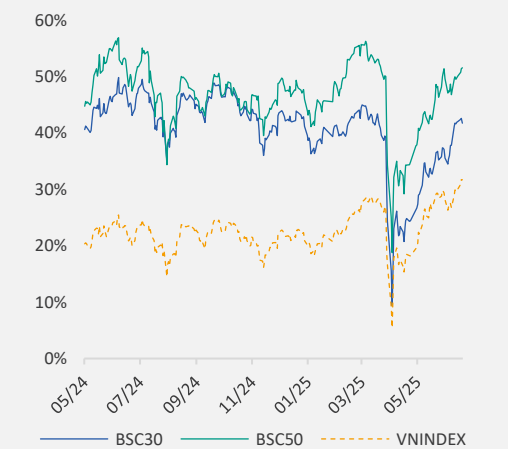
Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	67.61	1.75%
Gold	3,341	-0.26%
Exchange rate		
USD/VND	26,290	-0.06%
EUR/VND	31,301	0.43%
JPY/VND	185	0.00%

Interest rates		
10Y-Gov bond rate	3.30%	-0.01%
1M-interbank rate	3.78%	

Source: FiinPro-X, BSC compiled

Performances of BSC30, BSC50



Source: BSC

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
MSN	72.00	2.42%	0.62	1.51
GAS	68.50	1.48%	0.55	2.34
MBB	25.90	1.17%	0.43	6.10
TCB	34.05	0.74%	0.42	7.06
CTG	41.90	0.48%	0.25	5.37

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
NVB	12.10	7.08%	0.64	1.17
PVI	58.00	3.02%	0.26	0.23
NTP	77.60	1.84%	0.13	0.14
SEB	49.70	8.04%	0.08	0.03
PTI	23.80	3.93%	0.07	0.12

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
LGL	3.99	6.97%	0.00	1.00
LDG	2.67	6.80%	0.01	9.45
SVD	3.49	6.73%	0.00	0.12
HUB	15.80	5.69%	0.01	0.08
DGW	46.00	4.78%	0.11	3.94

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
QST	21.40	9.74%	0.03	0.00
STC	19.40	9.60%	0.04	0.01
TKU	14.90	9.56%	0.25	0.00
SGD	17.40	9.43%	0.03	0.00
BBS	15.10	9.42%	0.03	0.00

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VHM	76.00	-2.44%	-1.78	4.11
VIC	95.00	-0.84%	-0.72	3.88
VCB	56.40	-0.35%	-0.39	8.36
GVR	30.50	-0.97%	-0.28	4.00
BID	35.70	-0.42%	-0.25	7.02

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
DTK	12.40	-3.13%	-0.17	0.68
HUT	12.60	-2.33%	-0.17	0.89
VFS	26.50	-6.36%	-0.14	0.13
HHC	113.40	-10.00%	-0.12	0.02
VIF	16.90	-1.74%	-0.07	0.35

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
PMG	8.00	-6.98%	-0.01	0.00
GMH	7.75	-5.49%	0.00	0.01
VPS	8.53	-5.22%	0.00	0.00
PDN	99.90	-5.04%	-0.07	0.00
RYG	12.00	-4.00%	-0.01	2.22

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
GLT	30.50	-9.76%	-0.11	0.02
VC6	29.60	-9.76%	-0.12	0.00
SVN	4.70	-9.62%	-0.04	1.70
CMC	8.10	-8.99%	-0.01	0.00
CAN	31.40	-8.72%	-0.05	0.00

Figure 1
Sectors performance

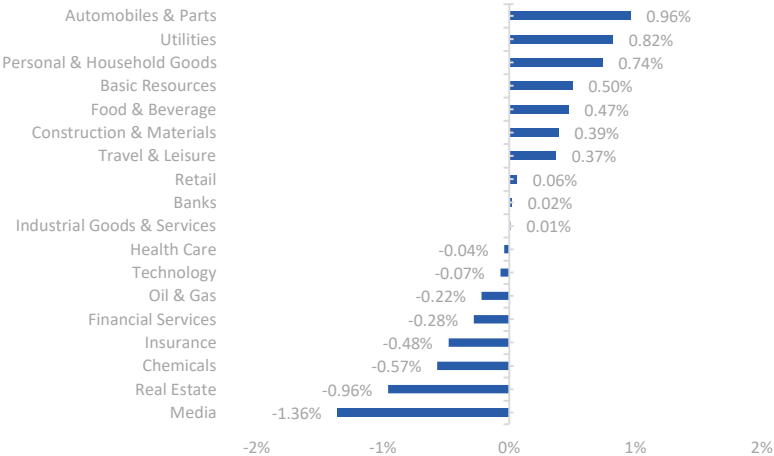
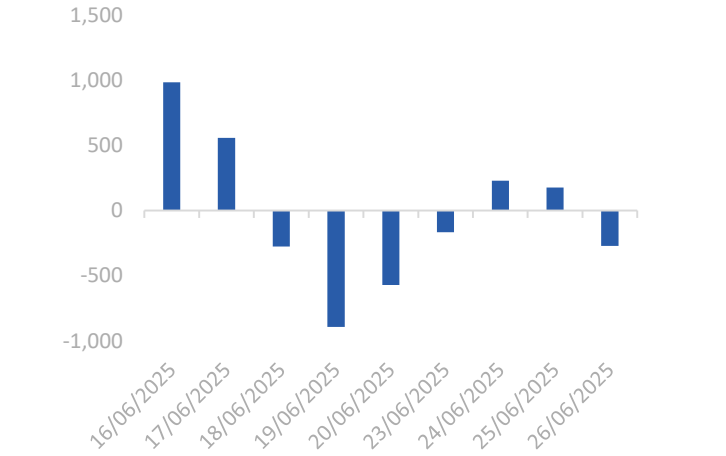


Figure 2
Foreign transactions



Source: FiinPro-X, BSC compiled

BSC30 PORTFOLIO

Stocks	Sector	Close (1,000 VND)	% Day	Beta	MC (VND bn)	Liquidity (VND bn)	EPS (VND)	P/E	TP (VND)	Foreign ownership	Link
MWG	Retail	64.5	-0.8%	1.3	96,110	345.9	2,977	21.8		48.1%	
KBC	Real Estate	26.5	2.7%	1.7	24,250	274.0	1,627	15.8		17.6%	
KDH	Real Estate	28.8	-2.5%	1.1	29,879	110.7	896	33.0		35.4%	
PDR	Real Estate	17.7	-0.3%	1.6	16,058	79.0	180	98.6	23,600	9.6%	Link
VHM	Real Estate	76.0	-2.4%	1.1	319,967	358.7	7,766	10.0	81,300	10.6%	Link
FPT	Technology	117.0	-0.1%	1.1	173,464	496.1	5,612	20.9	136,500	40.6%	Link
BSR	Oil & Gas	17.8	0.3%	0.0	55,034	30.8	(37)	-482.9		0.3%	
PVS	Oil & Gas	32.6	0.3%	1.4	15,534	138.3	2,303	14.1	38,600	14.5%	Link
HCM	Financial Services	20.9	-0.5%	1.7	22,625	110.1	1,390	15.1		37.4%	
SSI	Financial Services	24.5	0.0%	1.4	48,311	448.5	1,545	15.9		35.2%	
VCI	Financial Services	35.5	-1.0%	1.4	25,744	160.7	1,602	22.4		28.9%	
DCM	Chemicals	36.1	0.4%	1.7	19,005	116.3	2,805	12.8	37,800	5.0%	Link
DGC	Chemicals	96.7	-0.5%	1.5	36,914	98.8	8,224	11.8	109,300	14.8%	Link
ACB	Banks	21.2	-0.2%	0.8	109,154	210.3	3,224	6.6	30,400	29.8%	Link
BID	Banks	35.7	-0.4%	0.9	251,716	83.6	3,643	9.8	47,000	17.5%	Link
CTG	Banks	41.9	0.5%	1.0	223,929	253.9	4,806	8.7	50,000	27.1%	Link
HDB	Banks	21.7	-0.5%	0.9	76,192	1258.2	3,985	5.5	26,400	16.6%	Link
MBB	Banks	25.9	1.2%	0.9	156,218	915.4	4,049	6.3	28,200	23.2%	Link
MSB	Banks	12.0	0.0%	1.1	31,200	181.4	2,150	5.6	14,000	27.5%	Link
STB	Banks	46.8	0.0%	0.9	88,228	635.7	5,767	8.1		20.0%	
TCB	Banks	34.1	0.7%	1.2	238,792	1084.5	3,013	11.2	33,100	22.5%	Link
TPB	Banks	13.4	-0.4%	1.0	35,402	76.4	2,383	5.6	-	22.9%	Link
VCB	Banks	56.4	-0.4%	0.5	472,931	169.8	4,063	13.9	69,200	22.1%	Link
VIB	Banks	18.1	-0.6%	0.8	54,220	41.3	2,400	7.6	23,000	5.0%	Link
VPB	Banks	18.4	-0.3%	0.9	145,984	329.5	2,030	9.1	24,000	24.7%	Link
HPG	Basic Resources	22.8	0.6%	1.1	173,978	952.9	1,954	13.9	35,800	22.4%	Link
HSG	Basic Resources	16.8	0.0%	1.5	10,401	59.5	749	22.4	16,800	8.4%	Link
DBC	Food & Beverage	31.9	1.0%	1.8	10,576	209.5	3,930	8.0	32,200	4.3%	Link
MSN	Food & Beverage	72.0	2.4%	1.4	101,116	803.6	1,518	46.3	82,500	25.0%	Link
VNM	Food & Beverage	56.4	-0.7%	0.5	118,709	176.5	4,194	13.5	64,500	48.5%	Link

Source: FiinPro-X, BSC

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 (VND bn)	Liquidity (VND bn)	EPS (VND)	P/E	Foreign ownership	ROE (%)	Link
DGW	Retail	46.0	4.78%	1.8	9,622	177.7	2,098	20.9	25.66%	15.7%	Link
FRT	Retail	174.5	1.16%	1.2	23,502	114.4	3,279	52.6	32.21%	24.0%	Link
BVH	Insurance	52.5	-0.38%	1.1	39,120	9.6	2,975	17.7	27.26%	9.7%	
DIG	Real Estate	17.3	0.29%	1.4	11,151	152.8	303	56.9	3.13%	2.5%	
DXG	Real Estate	16.9	0.90%	1.5	17,015	161.7	310	54.0	23.62%	2.5%	Link
HDC	Real Estate	24.9	-0.80%	1.3	4,477	60.0	443	56.7	3.31%	3.4%	
HDG	Real Estate	25.6	-1.16%	1.5	9,564	99.3	762	33.9	19.28%	4.6%	Link
IDC	Real Estate	44.3	-0.23%	1.4	14,652	56.2	4,982	8.9	17.68%	31.2%	
NLG	Real Estate	36.9	-0.67%	1.6	14,286	63.7	1,827	20.3	46.12%	7.4%	Link
SIP	Real Estate	68.9	1.17%	0.0	14,337	54.7	6,076	11.2	4.10%	29.7%	
SZC	Real Estate	37.9	4.27%	1.7	6,533	165.3	2,036	17.8	2.79%	11.8%	Link
TCH	Real Estate	19.5	0.78%	1.7	12,897	55.0	1,279	15.1	10.37%	9.1%	Link
VIC	Real Estate	95.0	-0.84%	1.2	366,307	279.3	2,823	33.9	7.46%	8.0%	
VRE	Real Estate	24.5	-0.61%	1.2	56,013	57.6	1,844	13.4	18.02%	10.1%	Link
CMG	Technology	36.5	-0.27%	1.2	7,734	31.6	1,654	22.1	36.00%	12.5%	
PLX	Oil & Gas	37.1	-0.67%	1.0	47,393	56.0	1,535	24.3	17.18%	7.6%	Link
PVD	Oil & Gas	20.0	-0.74%	1.5	11,201	133.3	1,246	16.2	3.50%	4.4%	Link
FTS	Financial Services	37.0	-1.60%	2.0	12,653	144.7	1,650	22.8	27.63%	13.7%	
MBS	Financial Services	27.0	-0.37%	1.8	15,522	81.8	1,650	16.4	6.65%	12.9%	
GAS	Utilities	68.5	1.48%	0.8	158,130	61.4	4,543	14.9	1.91%	17.0%	Link
POW	Utilities	13.0	-0.38%	1.0	30,444	145.9	546	23.8	3.36%	4.0%	Link
REE	Utilities	67.5	0.75%	1.0	36,291	39.8	3,922	17.1	49.00%	11.4%	Link
VJC	Travel & Leisure	87.1	0.00%	0.6	51,529	45.9	2,773	31.4	11.89%	8.9%	
GEX	Industrial Goods & Services	37.5	0.00%	1.7	33,840	733.2	1,954	19.2	8.59%	12.8%	Link
GMD	Industrial Goods & Services	55.3	-0.90%	1.2	23,447	139.9	3,797	14.7	40.17%	11.9%	Link
HAH	Industrial Goods & Services	67.1	0.90%	1.3	8,638	198.1	5,594	11.9	4.83%	25.8%	Link
PVT	Industrial Goods & Services	18.1	1.40%	1.4	8,388	34.4	2,293	7.8	10.00%	14.2%	Link
VTP	Industrial Goods & Services	114.2	0.09%	0.0	13,895	40.2	3,235	35.3	5.84%	24.9%	
PNJ	Personal & Household Goods	80.9	1.63%	1.0	26,897	68.5	6,105	13.0	48.93%	18.6%	Link
TCM	Personal & Household Goods	30.9	-0.32%	1.1	3,473	54.6	2,608	11.9	50.00%	13.2%	
TNG	Personal & Household Goods	20.4	0.49%	1.3	2,489	36.4	2,580	7.9	16.70%	17.0%	Link
DPM	Chemicals	38.0	1.33%	1.4	14,675	132.4	1,223	30.7	7.51%	4.3%	Link
GVR	Chemicals	30.5	-0.97%	2.3	123,200	59.0	1,174	26.2	0.97%	8.9%	
EIB	Banks	23.3	-0.43%	1.0	43,495	707.1	1,856	12.6	5.13%	14.0%	Link
LPB	Banks	31.8	0.00%	0.8	94,996	34.8	3,333	9.5	0.78%	23.7%	
NAB	Banks	16.5	0.30%	0.0	22,510	17.8	2,809	5.8	1.77%	20.4%	
OCB	Banks	11.7	-0.85%	0.9	29,096	36.5	1,189	9.9	19.43%	9.4%	Link
NKG	Basic Resources	13.3	-0.75%	1.4	5,997	37.0	1,122	11.9	5.17%	5.9%	Link
ANV	Food & Beverage	18.9	3.29%	1.6	4,859	67.4	612	29.8	1.55%	5.7%	
BAF	Food & Beverage	35.1	-0.99%	0.8	10,778	141.5	1,395	25.4	3.84%	12.2%	
SAB	Food & Beverage	50.5	0.40%	1.2	64,513	68.8	3,217	15.6	58.92%	17.2%	
VHC	Food & Beverage	58.5	2.81%	1.4	12,771	143.9	5,567	10.2	22.20%	14.4%	Link
BMP	Construction & Materials	138.9	0.00%	1.0	11,370	19.9	13,288	10.5	85.56%	38.6%	Link
CTD	Construction & Materials	83.9	1.08%	1.4	8,294	59.5	3,238	25.6	48.61%	3.7%	Link
CTR	Construction & Materials	97.9	-0.71%	1.6	11,278	33.1	4,754	20.7	9.65%	29.3%	Link
DPG	Construction & Materials	44.0	1.85%	1.4	4,355	44.8	2,336	18.5	7.18%	12.2%	
HHV	Construction & Materials	12.4	-0.40%	1.5	5,898	55.2	1,088	11.4	9.99%	5.2%	Link
PC1	Construction & Materials	21.9	-0.46%	1.5	7,850	32.3	1,237	17.8	16.11%	8.1%	Link
VCG	Construction & Materials	21.8	0.93%	1.5	13,931	232.8	915	23.6	8.23%	7.4%	
VGC	Construction & Materials	45.1	0.22%	1.6	20,176	22.8	2,720	16.6	5.60%	14.6%	

Source: FiinPro-X, BSC

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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Contact Information - BSC Research

Tran Thang Long
Head of Research
Longtt@bsc.com.vn

Bui Nguyen Khoa
Deputy Head of Research
Macroeconomic & Market Research
Khoabn@bsc.com.vn

Phan Quoc Buu
Deputy Head of Research
Sector & Corporate Research
Buupq@bsc.com.vn

Macroeconomic & Market Research

Vu Viet Anh
Analyst
Anhvv@bsc.com.vn

Tran Thanh Tung
Analyst
Tungtt1@bsc.com.vn

Pham Thanh Thao
Analyst
Thaopt1@bsc.com.vn

Nguyen Giang Anh
Analyst
Anhng@bsc.com.vn

Luu Diem Ngoc
Analyst
Ngocld@bsc.com.vn

BSC Headquarters

8th, 9th floor, ThaiHoldings Tower
210 Tran Quang Khai street, Hanoi, Vietnam
Tel: (008424) 3935 2722
Fax: (008424) 2220 0669

Branch

4th, 9th Floor, President Place Tower
93 Nguyen Du Street, Ben Nghe Ward, District 1, Ho Chi Minh City, Vietnam
Tel: (008424) 3821 8885
Fax: (008424) 3821 8879

BSC Research
hn.ptnc@bsc.com.vn
(008424) 39352722 - Ext 108

Institutional Investors
hn.tvdt.khtc@bsc.com.vn
(008424) 39264 659

Individual Investors
i-center@bsc.com.vn
(008424) 39264 660

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