Vietnam Daily Review

THE VN-INDEX TRADED WITHIN THE RANGE OF 1,360 TO 1,370 POINTS

Friday, 27 June 2025

STOCK MARKET

The tug-of-war trend remained dominant today. At the close, the VN-Index finished at 1,371.44 points, nearly 6 points higher than yesterday. Market breadth skewed positive, with 15 of 18 sectors advancing—led by Food & Beverage, followed by Retail and Personal & Household Products. In foreign trading, investors were net sellers on all three exchanges (HSX, HNX, and UPCOM). The market is consolidating in the 1,360–1,370 range and will need a directional candlestick and supporting volume to confirm the uptrend.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 27/06/2025, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

• VN-Index +5.77 points, closing at 1371.44 points. HNX-Index +0.11 points, closing at 227.81 points.

• Pulling the index up: MSN (+1.80), VHM (+0.97), VNM (+0.70), BID (+0.66), VCB (+0.58).

• Pulling the index down: MBB (-0.28), GAS (-0.27), STB (-0.19), GEE (-0.18), TCB (-0.16).

• The matched trade value of VN-Index reached VND 17,437 billion, increased 16.55% compared to the previous session. The total transaction value reached VND 18,996 billion.

• The trading range is 11.19 points. The market had 163 gainers, 69 remaining unchanged, 138 losers.

• Foreign investors' net selling value: VND -31.26 billion on HOSE, including VCB (VND -168.94 billion), ACB (VND -154.37 billion), VPB (VND -152.31 billion), HCM (VND -150.64 billion), STB (VND -149.61 billion). Foreign investors were net sellers on HNX with the value of VND -268.14 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 +0.51%. Positive stocks: MSN (+6.67%), VNM (+2.48%), DGC (+2.28%).

• BSC50 +0.37%. Positive stocks: CMG (+6.99%), ANV (+5.04%), CTR (+4.49%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.51%	0.37%	0.42%	0.84%
1 week	0.33%	1.10%	1.64%	2.84%
1 months	4.33%	2.51%	2.20%	3.05%
3 months	2.11%	0.52%	4.10%	7.42%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,371.44	227.81	100.62
% 1D	0.42%	0.05%	0.56%
TV (VND bn)	17,437	1,175	486
%1D	16.55%	4.89%	-3.14%
Foreign (VND bn)	-31.26	-268.14	-58.14

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VND	337.76	VCB	-168.94
SSI	321.49	ACB	-154.37
DGW	284.08	VPB	-152.31
HPG	280.99	HCM	-150.64
GEX	197.00	STB	-149.61

Source: FiinPro-X, BSC compiled

Overview of global stock markets

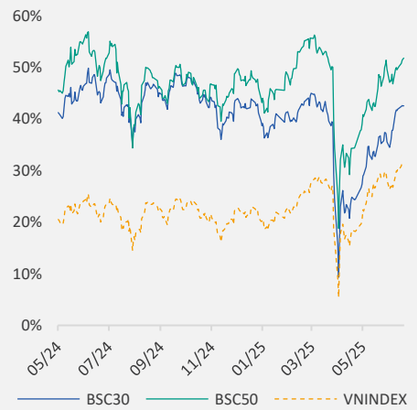
		%D	%W
SPX	6,141	0.80%	2.68%
FTSE100	8,781	0.51%	0.07%
Eurostoxx	5,297	0.98%	1.19%
Shanghai	3,424	-0.70%	1.91%
Nikkei	40,146	1.42%	4.54%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	68.36	2.42%
Gold	3,289	0.00%
Exchange rate		
USD/VND	26,270	-0.08%
EUR/VND	31,364	0.20%
JPY/VND	185	0.00%
Interst rates		
10Y-Gov bond rate	3.32%	0.02%
1M-interbank rate	4.20%	

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	76.80	6.67%	1.80	1.51
VHM	77.00	1.32%	0.97	4.11
VNM	57.80	2.48%	0.70	2.09
BID	36.10	1.12%	0.66	7.02
VCB	56.70	0.53%	0.58	8.36

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
MBB	25.70	-0.77%	-0.28	6.10
GAS	68.00	-0.73%	-0.27	2.34
STB	46.35	-0.96%	-0.19	1.89
GEE	95.30	-2.26%	-0.18	0.37
TCB	33.95	-0.29%	-0.16	7.06

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
HUT	12.50	2.46%	0.18	0.89
HHC	124.60	9.88%	0.13	0.02
VCS	48.20	1.69%	0.08	0.16
BAB	11.80	0.85%	0.06	0.96
DNP	20.90	2.96%	0.06	0.14

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
PVS	32.10	-1.53%	-0.15	0.48
PVI	57.30	-1.21%	-0.10	0.23
KSV	164.20	-0.48%	-0.10	0.20
VIF	16.50	-2.37%	-0.09	0.35
IDC	43.90	-0.90%	-0.08	0.33

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
CMG	39.05	6.99%	0.13	3.21
PNC	22.25	6.97%	0.00	0.00
TTE	39.95	6.96%	0.02	0.00
SVD	3.73	6.88%	0.00	0.14
LDG	2.85	6.74%	0.01	4.98

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
DCL	22.35	-6.88%	-0.03	2.23
ADG	8.52	-6.37%	0.00	0.00
TNC	28.05	-4.92%	-0.01	0.00
PJT	10.35	-4.17%	0.00	0.01
VPG	7.67	-3.40%	-0.01	1.52

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BBS	16.60	9.93%	0.04	0.00
HHC	124.60	9.88%	0.78	0.00
CAN	34.50	9.87%	0.07	0.00
QST	23.50	9.81%	0.03	0.00
KMT	11.50	9.52%	0.04	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
GLT	27.50	-9.84%	-0.10	0.01
BPC	11.30	-9.60%	-0.02	0.00
BDB	8.60	-9.48%	0.00	0.00
STC	17.60	-9.28%	-0.04	0.00
HJS	27.50	-8.33%	-0.18	0.01

Figure 1
Sectors performance

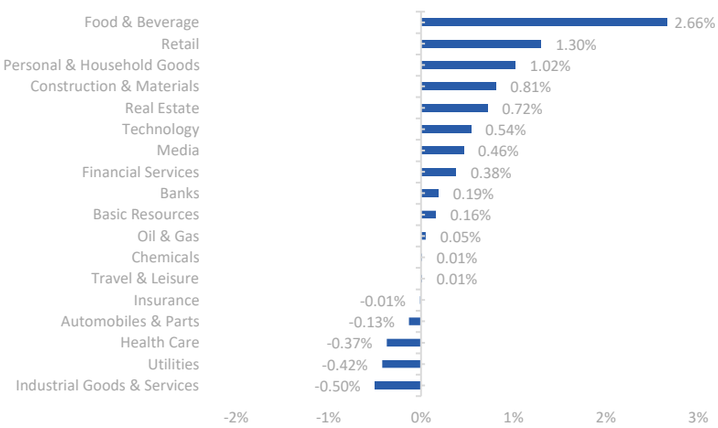
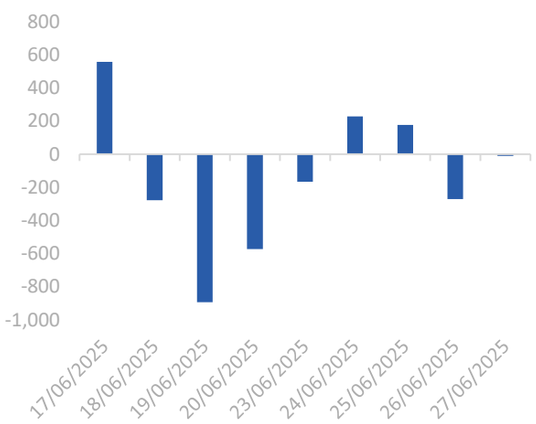


Figure 2
Foreign transactions



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	65.8	2.0%	1.5	95,370	1131.9	2,977	21.7		48.1%	
KBC	Real Estate	26.5	0.0%	1.5	24,909	176.5	1,626	16.3		17.7%	
KDH	Real Estate	29.0	0.7%	1.2	29,121	53.3	896	32.1		35.3%	
PDR	Real Estate	17.7	0.0%	1.6	16,013	178.3	180	98.3	23,600	9.6%	Link
VHM	Real Estate	77.0	1.3%	1.1	312,163	393.2	7,766	9.8	81,300	10.6%	Link
FPT	Technology	117.3	0.3%	1.0	173,316	703.2	5,612	20.9	136,500	40.6%	Link
BSR	Oil & Gas	17.8	-0.3%	0.0	55,189	51.6	(37)	-484.2		0.3%	
PVS	Oil & Gas	32.1	-1.5%	1.3	15,582	181.1	2,303	14.2	38,600	14.0%	Link
HCM	Financial Services	21.2	1.4%	1.5	22,517	173.6	1,388	15.0		36.7%	
SSI	Financial Services	24.7	0.6%	1.3	48,311	479.7	1,545	15.9		35.4%	
VCI	Financial Services	35.5	-0.1%	1.3	25,493	181.6	1,602	22.2		28.8%	
DCM	Chemicals	33.7	-1.2%	1.3	19,085	146.1	2,805	12.9	37,800	5.0%	Link
DGC	Chemicals	98.9	2.3%	1.5	36,725	413.7	8,224	11.8	109,300	14.8%	Link
ACB	Banks	21.2	0.0%	0.9	108,897	134.1	3,224	6.6	30,400	29.8%	Link
BID	Banks	36.1	1.1%	1.0	250,663	300.2	3,643	9.8	47,000	17.5%	Link
CTG	Banks	42.0	0.1%	1.0	225,003	249.9	4,806	8.7	50,000	27.1%	Link
HDB	Banks	21.8	0.5%	1.0	75,843	220.3	3,985	5.5	26,400	16.6%	Link
MBB	Banks	25.7	-0.8%	1.0	158,049	424.8	4,049	6.4	28,200	23.2%	Link
MSB	Banks	12.0	0.0%	1.1	31,200	82.9	2,150	5.6	14,000	27.5%	Link
STB	Banks	46.4	-1.0%	1.0	88,228	269.9	5,767	8.1		19.9%	
TCB	Banks	34.0	-0.3%	1.2	240,558	705.9	3,013	11.3	33,100	22.5%	Link
TPB	Banks	13.4	0.4%	1.2	35,270	111.0	2,383	5.6	-	22.9%	Link
VCB	Banks	56.7	0.5%	0.6	471,260	237.2	4,063	13.9	69,200	22.1%	Link
VIB	Banks	18.1	0.0%	0.9	53,922	53.5	2,400	7.5	23,000	5.0%	Link
VPB	Banks	18.5	0.8%	1.0	145,587	415.2	2,030	9.0	24,000	24.6%	Link
HPG	Basic Resources	22.9	0.2%	1.1	175,001	424.0	1,628	14.0	35,800	22.4%	Link
HSG	Basic Resources	16.6	-1.2%	1.4	10,401	62.0	749	22.4	16,800	8.5%	Link
DBC	Food & Beverage	32.0	0.3%	1.6	10,676	297.5	3,930	8.1	32,200	4.5%	Link
MSN	Food & Beverage	76.8	6.7%	1.2	103,561	1058.6	1,518	47.4	82,500	25.0%	Link
VNM	Food & Beverage	57.8	2.5%	0.5	117,873	513.0	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	44.8	-2.61%	1.7	10,082	94.9	2,098	21.9	26.22%	15.7%	Link
FRT	Retail	175.5	0.57%	1.2	23,774	96.4	3,279	53.2	32.16%	24.0%	Link
BVH	Insurance	52.2	-0.57%	1.2	38,972	20.1	2,975	17.7	27.26%	9.7%	
DIG	Real Estate	17.6	1.73%	1.5	11,183	420.1	303	57.1	3.13%	2.5%	
DXG	Real Estate	16.9	0.00%	1.5	17,168	294.8	310	54.4	23.70%	2.5%	Link
HDC	Real Estate	24.9	0.00%	1.3	4,441	84.7	443	56.3	3.31%	3.4%	
HDG	Real Estate	25.2	-1.57%	1.4	9,453	96.7	762	33.5	19.28%	4.6%	Link
IDC	Real Estate	43.9	-0.90%	1.4	14,619	52.5	4,982	8.9	17.68%	31.2%	
NLG	Real Estate	37.1	0.68%	1.5	14,190	45.3	1,827	20.2	46.12%	7.4%	Link
SIP	Real Estate	68.2	-1.02%	0.0	14,506	35.7	6,076	11.3	4.09%	29.7%	
SZC	Real Estate	37.5	-0.92%	1.3	6,812	80.8	2,036	18.6	2.88%	11.8%	Link
TCH	Real Estate	19.6	0.51%	1.5	12,997	131.1	1,279	15.2	10.37%	9.1%	Link
VIC	Real Estate	95.5	0.53%	1.3	363,248	286.5	2,823	33.7	7.45%	8.0%	
VRE	Real Estate	24.8	1.22%	1.0	55,672	90.7	1,844	13.3	17.92%	10.1%	Link
CMG	Technology	39.1	6.99%	1.1	7,712	123.4	1,654	22.1	36.00%	12.5%	
PLX	Oil & Gas	37.3	0.67%	0.9	47,075	21.4	1,535	24.1	17.18%	7.6%	Link
PVD	Oil & Gas	19.8	-1.00%	1.1	11,118	92.3	1,246	16.1	3.43%	4.4%	Link
FTS	Financial Services	37.2	0.54%	1.7	12,451	128.1	1,650	22.4	27.63%	13.7%	
MBS	Financial Services	27.0	0.00%	1.7	15,465	72.8	1,650	16.4	6.56%	12.9%	
GAS	Utilities	68.0	-0.73%	0.9	160,473	47.9	4,543	15.1	1.91%	17.0%	Link
POW	Utilities	13.0	0.00%	1.0	30,327	56.5	546	23.7	3.36%	4.0%	Link
REE	Utilities	67.3	-0.30%	1.0	36,562	39.8	3,922	17.2	49.00%	11.4%	Link
VJC	Travel & Leisure	87.2	0.11%	0.5	51,529	61.9	2,773	31.4	11.89%	8.9%	
GEX	Industrial Goods & Services	37.3	-0.53%	1.5	33,840	427.1	1,954	19.2	9.17%	12.8%	Link
GMD	Industrial Goods & Services	55.4	0.18%	1.0	23,237	59.4	3,797	14.6	40.17%	11.9%	Link
HAH	Industrial Goods & Services	66.1	-1.49%	1.3	8,716	123.5	5,594	12.0	4.98%	25.8%	Link
PVT	Industrial Goods & Services	17.9	-1.38%	1.2	8,506	21.8	2,293	7.9	10.00%	14.2%	Link
VTP	Industrial Goods & Services	117.8	3.15%	0.0	13,908	119.7	3,235	35.3	5.82%	24.9%	
PNJ	Personal & Household Goods	81.9	1.24%	1.1	27,337	65.6	6,105	13.3	48.94%	18.6%	Link
TCM	Personal & Household Goods	31.5	1.78%	0.9	3,462	90.8	2,608	11.9	49.98%	13.2%	
TNG	Personal & Household Goods	20.6	0.98%	1.4	2,501	46.9	2,580	7.9	16.80%	17.0%	Link
DPM	Chemicals	37.8	-0.53%	1.2	14,871	98.0	1,223	31.1	7.62%	4.3%	Link
GVR	Chemicals	30.4	-0.49%	1.7	122,000	70.8	1,174	26.0	0.95%	8.9%	
EIB	Banks	23.0	-1.29%	1.1	43,308	288.2	1,856	12.5	5.13%	14.0%	Link
LPB	Banks	32.0	0.47%	0.5	94,996	60.6	3,333	9.5	0.78%	23.7%	
NAB	Banks	16.7	1.52%	0.0	22,578	78.6	2,809	5.9	1.78%	20.4%	
OCB	Banks	11.7	0.00%	1.0	28,850	52.7	1,189	9.8	19.42%	9.4%	Link
NKG	Basic Resources	13.3	-0.38%	1.4	5,953	51.6	1,122	11.9	5.13%	5.9%	Link
ANV	Food & Beverage	19.8	5.04%	1.6	5,019	129.4	612	30.8	1.65%	5.7%	
BAF	Food & Beverage	35.1	0.00%	0.8	10,671	146.5	1,394	25.2	3.72%	12.2%	
SAB	Food & Beverage	50.6	0.20%	1.2	64,769	155.4	3,217	15.7	58.93%	17.2%	
VHC	Food & Beverage	59.7	2.05%	1.4	13,131	135.1	5,567	10.5	22.43%	14.4%	Link
BMP	Construction & Materials	139.0	0.07%	1.1	11,370	8.7	13,288	10.5	85.62%	38.6%	Link
CTD	Construction & Materials	84.0	0.12%	1.6	8,384	60.5	3,238	25.9	48.60%	3.7%	Link
CTR	Construction & Materials	102.3	4.49%	1.3	11,198	152.8	4,754	20.6	9.65%	29.3%	Link
DPG	Construction & Materials	43.2	-1.93%	1.4	4,435	38.2	2,336	18.8	6.91%	12.2%	
HHV	Construction & Materials	12.4	-0.40%	1.5	5,875	58.2	1,088	11.4	9.95%	5.2%	Link
PC1	Construction & Materials	21.9	0.23%	1.3	7,814	35.5	1,237	17.7	15.60%	8.1%	Link
VCG	Construction & Materials	22.0	1.15%	1.4	14,061	304.8	915	23.8	8.12%	7.4%	
VGC	Construction & Materials	45.3	0.44%	1.5	20,221	25.0	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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