Vietnam Daily Review

THE VN-INDEX IS CONSOLIDATING ABOVE THE 1,370 LEVEL

Tuesday, 1 July 2025

STOCK MARKET

The VN-Index continued its mixed upward and sideways trend today, closing at 1,377.84 points, up nearly 2 points from yesterday. Market breadth leaned negative with 11 out of 18 sectors declining. On the other hand, the Chemicals sector had a positive trading session. Overall, sectors did not experience significant fluctuations. In terms of foreign investor activity, they were net sellers across all three exchanges: HSX, HNX, and UPCOM today. The market is showing strong consolidation around the level above 1,370. In upcoming sessions, investors are advised to trade cautiously.

FUTURES CONTRACTS

Futures contracts decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 01/07/2025, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

• VN-Index +1.77 points, closing at 1377.84 points. HNX-Index -0.77 points, closing at 228.45 points.

• Pulling the index up: VCB (+2.39), GVR (+0.82), HVN (+0.53), BID (+0.50), TCB (+0.33).

• Pulling the index down: GAS (-0.75), MSN (-0.55), VHM (-0.38), MWG (-0.34), VNM (-0.24).

• The matched trade value of VN-Index reached VND 17,833 billion, increased 8.24% compared to the previous session. The total transaction value reached VND 21,034 billion.

• The trading range is 12.42 points. The market had 117 gainers, 53 remaining unchanged, 196 losers.

• Foreign investors' net selling value: VND -365.28 billion on HOSE, including VJC (VND -368.20 billion), HDB (VND -219.48 billion), HPG (VND -94.07 billion), GEX (VND -52.31 billion), HDG (VND -39.56 billion). Foreign investors were net sellers on HNX with the value of VND -2.73 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 -0.15%. Positive stocks: VCB (+2.11%), MSB (+2.08%), DBC (+2.06%).

• BSC50 +0.06%. Positive stocks: ANV (+6.86%), VCG (+4.54%), TNG (+3.86%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.15%	0.06%	0.13%	-0.09%
1 week	1.45%	1.56%	0.81%	0.91%
1 months	6.99%	5.09%	3.39%	3.69%
3 months	3.92%	2.49%	4.55%	7.21%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,377.84	228.45	100.72
% 1D	0.13%	-0.34%	-0.12%
TV (VND bn)	17,833	1,394	425
%1D	8.24%	10.10%	-23.37%
Foreign (VND bn)	-365.28	-2.73	-15.21

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
HVN	70.30	VJC	-368.20
MSN	61.16	HDB	-219.48
FPT	51.95	HPG	-94.07
DBC	45.48	GEX	-52.31
NLG	38.20	HDG	-39.56

Source: FiinPro-X, BSC compiled

Overview of global stock markets

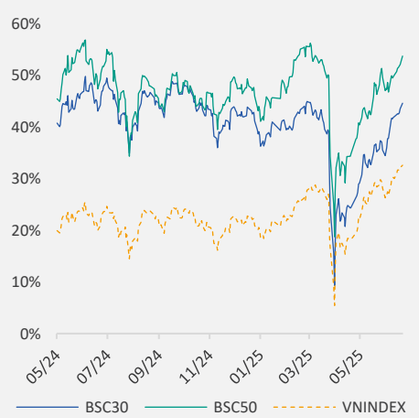
		%D	%W
SPX	6,205	0.52%	2.98%
FTSE100	8,753	-0.10%	-0.15%
Eurostoxx	5,287	-0.50%	-0.32%
Shanghai	3,458	0.39%	1.09%
Nikkei	39,986	-1.24%	2.88%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	66.66	0.05%
Gold	3,288	-0.03%
Exchange rate		
USD/VND	26,310	0.04%
EUR/VND	31,621	0.61%
JPY/VND	186	0.54%
Interst rates		
10Y-Gov bond rate	3.32%	-0.02%
1M-interbank rate	4.92%	

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)
VCB	58.20	2.11%	2.39	8.36
GVR	31.15	2.81%	0.82	4.00
HVN	38.90	2.64%	0.53	2.21
BID	36.60	0.83%	0.50	7.02
TCB	34.40	0.58%	0.33	7.06

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
GAS	66.40	-2.06%	-0.75	2.34
MSN	75.20	-2.08%	-0.55	1.51
VHM	76.30	-0.52%	-0.38	4.11
MWG	64.50	-1.53%	-0.34	1.48
VNM	57.50	-0.86%	-0.24	2.09

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
IDC	45.70	3.39%	0.33	0.33
DTK	12.40	3.33%	0.18	0.68
NVB	12.10	1.68%	0.15	1.17
TNG	21.50	3.86%	0.07	0.12
PRE	20.90	4.50%	0.06	0.10

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
PVS	32.10	-2.43%	-0.24	0.48
VFS	22.40	-9.68%	-0.18	0.13
CEO	17.40	-2.79%	-0.17	0.54
KSF	64.50	-1.23%	-0.15	0.30
HUT	12.70	-1.55%	-0.11	0.89

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
DTA	4.60	6.98%	0.00	0.14
TLH	5.56	6.92%	0.01	0.82
LDG	3.25	6.91%	0.01	3.26
ANV	22.60	6.86%	0.10	8.84
TLG	56.20	6.84%	0.08	1.38

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
PMG	7.86	-6.87%	-0.01	0.00
LGC	58.90	-6.80%	-0.18	0.00
FDC	15.90	-6.47%	-0.01	0.00
VCA	8.84	-6.46%	0.00	0.02
PIT	6.80	-5.95%	0.00	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
APS	6.70	9.84%	0.21	2.84
VTC	9.10	9.64%	0.02	0.01
BTW	44.60	9.58%	0.15	0.00
SGD	22.90	9.57%	0.03	0.01
CAN	37.80	9.57%	0.07	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
KDM	15.70	-9.77%	-0.04	0.02
GLT	22.40	-9.68%	-0.08	0.02
VFS	22.40	-9.68%	-1.07	3.93
KMT	10.40	-9.57%	-0.04	0.02
VE3	7.80	-9.30%	0.00	0.00

Figure 1
Sectors performance

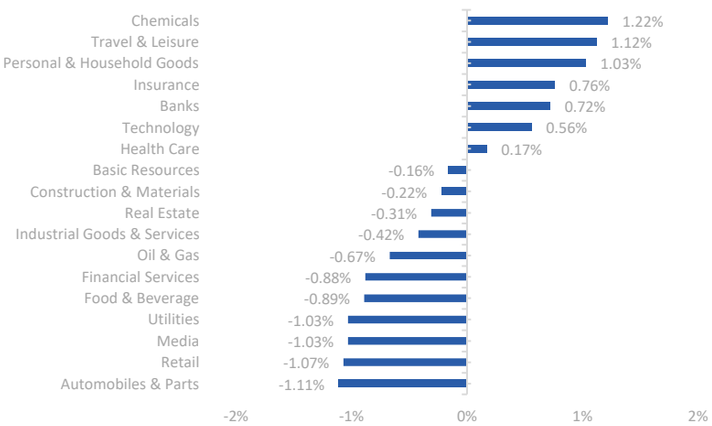
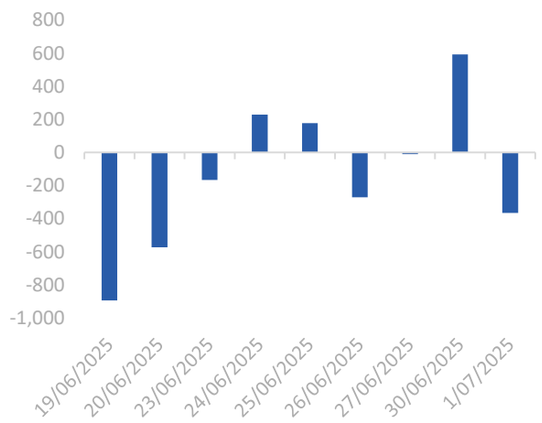


Figure 2
Foreign transactions



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	-1.5%	1.5	95,370	641.5	2,977	21.7		48.2%	
KBC	Real Estate	26.3	-1.9%	1.4	24,721	138.0	1,621	16.2		17.7%	
KDH	Real Estate	29.5	0.2%	1.3	29,778	48.4	896	32.9		35.2%	
PDR	Real Estate	17.6	-2.5%	1.7	15,967	172.6	179	98.1	23,600	9.7%	Link
VHM	Real Estate	76.3	-0.5%	0.9	313,396	295.8	7,766	9.8	81,300	10.6%	Link
FPT	Technology	118.8	0.5%	0.9	175,982	1485.2	5,612	21.2	136,500	40.5%	Link
BSR	Oil & Gas	17.8	-0.3%	0.0	55,189	37.3	(37)	-484.2		0.3%	
PVS	Oil & Gas	32.1	-2.4%	1.5	15,343	158.6	2,303	13.9	38,600	13.7%	Link
HCM	Financial Services	21.3	-0.7%	1.4	22,949	158.3	1,378	15.4		36.8%	
SSI	Financial Services	24.5	-1.0%	1.2	48,212	371.9	1,545	15.8		35.5%	
VCI	Financial Services	35.4	-1.0%	1.3	25,421	160.3	1,602	22.1		28.7%	
DCM	Chemicals	33.5	-0.7%	1.4	17,708	100.0	2,805	11.9	37,800	4.9%	Link
DGC	Chemicals	100.9	-0.8%	1.4	38,320	245.4	8,224	12.3	109,300	14.8%	Link
ACB	Banks	21.3	0.0%	0.8	109,411	160.6	3,224	6.6	30,400	29.7%	Link
BID	Banks	36.6	0.8%	0.8	256,982	256.3	3,643	10.1	47,000	17.5%	Link
CTG	Banks	41.9	0.0%	1.1	225,003	173.4	4,806	8.7	50,000	27.1%	Link
HDB	Banks	22.1	1.4%	1.1	77,241	899.9	3,985	5.6	26,400	16.5%	Link
MBB	Banks	26.0	0.8%	1.0	158,659	695.4	4,049	6.4	28,200	23.2%	Link
MSB	Banks	12.3	2.1%	1.0	31,850	174.2	2,150	5.7	14,000	27.5%	Link
STB	Banks	47.0	0.5%	1.0	88,511	287.0	5,767	8.1		19.8%	
TCB	Banks	34.4	0.6%	1.1	243,031	848.4	3,013	11.4	33,100	22.5%	Link
TPB	Banks	13.6	0.7%	1.0	35,799	179.9	2,383	5.7	-	23.0%	Link
VCB	Banks	58.2	2.1%	0.8	486,300	589.4	4,063	14.3	69,200	22.1%	Link
VIB	Banks	18.3	0.0%	0.9	54,518	73.4	2,400	7.6	23,000	5.0%	Link
VPB	Banks	18.5	-0.3%	1.0	146,381	323.2	2,030	9.1	24,000	24.6%	Link
HPG	Basic Resources	22.7	-0.2%	1.3	173,850	505.7	1,628	13.9	35,800	22.3%	Link
HSG	Basic Resources	16.7	0.6%	1.7	10,370	103.4	749	22.3	16,800	8.5%	Link
DBC	Food & Beverage	34.7	2.1%	1.6	11,613	411.0	3,930	8.8	32,200	5.2%	Link
MSN	Food & Beverage	75.2	-2.1%	1.3	108,164	530.0	1,518	49.5	82,500	25.2%	Link
VNM	Food & Beverage	57.5	-0.9%	0.6	120,172	234.6	4,194	13.7	64,500	48.4%	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	43.8	-0.45%	1.5	9,600	72.4	2,098	20.9	26.26%	15.7%	Link
FRT	Retail	179.6	0.22%	0.7	24,469	220.2	3,279	54.8	32.22%	24.0%	Link
BVH	Insurance	53.6	0.94%	1.1	39,789	35.2	2,975	18.0	27.25%	9.7%	
DIG	Real Estate	17.1	-3.39%	1.7	11,054	330.5	303	56.4	2.89%	2.5%	
DXG	Real Estate	16.7	-1.48%	1.7	16,964	254.4	310	53.8	23.69%	2.5%	Link
HDC	Real Estate	25.3	-1.75%	1.4	4,512	100.5	443	57.2	3.83%	3.4%	
HDG	Real Estate	25.1	-1.18%	1.4	9,268	112.4	762	32.9	18.81%	4.6%	Link
IDC	Real Estate	45.7	3.39%	1.5	15,081	153.2	4,982	9.2	17.78%	31.2%	
NLG	Real Estate	39.0	-0.26%	1.6	15,018	80.0	1,827	21.4	46.91%	7.4%	Link
SIP	Real Estate	69.1	0.44%	1.4	14,548	46.1	6,076	11.4	4.13%	29.7%	
SZC	Real Estate	38.4	0.00%	1.4	6,902	98.5	2,036	18.8	2.92%	11.8%	Link
TCH	Real Estate	19.9	-0.50%	1.5	13,297	63.9	1,279	15.6	10.55%	9.1%	Link
VIC	Real Estate	95.6	0.00%	1.1	365,542	222.4	2,823	33.9	7.45%	8.0%	
VRE	Real Estate	24.8	0.61%	1.0	56,353	62.5	1,844	13.5	17.89%	10.1%	Link
CMG	Technology	42.3	2.42%	1.3	8,938	119.4	1,654	25.6	36.22%	12.5%	Link
PLX	Oil & Gas	36.9	-0.94%	1.1	46,885	39.9	1,535	24.0	17.17%	7.6%	Link
PVD	Oil & Gas	19.8	-1.50%	1.3	10,979	98.5	1,246	15.9	3.47%	4.4%	Link
FTS	Financial Services	37.3	-1.19%	1.7	12,907	106.8	1,649	22.6	27.68%	13.7%	
MBS	Financial Services	26.7	-1.11%	1.6	15,293	81.0	1,650	16.2	6.42%	12.9%	
GAS	Utilities	66.4	-2.06%	1.0	155,553	57.6	4,543	14.6	1.91%	17.0%	Link
POW	Utilities	13.0	0.00%	1.3	30,444	128.8	546	23.8	3.33%	4.0%	Link
REE	Utilities	67.5	-0.88%	0.9	36,562	60.2	3,922	17.2	49.00%	11.4%	Link
VJC	Travel & Leisure	90.5	2.72%	0.6	53,541	525.3	2,769	32.7	11.90%	8.9%	
GEX	Industrial Goods & Services	37.0	-1.07%	1.7	33,389	392.0	1,954	18.9	9.05%	12.8%	Link
GMD	Industrial Goods & Services	57.5	-0.69%	1.2	24,161	109.2	3,797	15.1	39.87%	11.9%	Link
HAH	Industrial Goods & Services	66.4	-1.63%	1.2	8,625	125.3	5,594	11.9	4.71%	25.8%	Link
PVT	Industrial Goods & Services	17.7	-1.12%	1.2	8,318	39.8	2,293	7.7	9.86%	14.2%	Link
VTP	Industrial Goods & Services	115.9	-1.78%	0.0	14,115	90.7	3,235	35.8	5.78%	24.9%	
PNJ	Personal & Household Goods	83.4	0.36%	1.1	28,181	76.8	6,105	13.7	48.91%	18.6%	Link
TCM	Personal & Household Goods	32.2	1.42%	1.0	3,602	83.8	2,608	12.3	49.99%	13.2%	
TNG	Personal & Household Goods	21.5	3.86%	1.6	2,636	68.3	2,580	8.3	16.98%	17.0%	Link
DPM	Chemicals	38.4	-0.26%	1.3	15,027	142.9	1,223	31.4	7.65%	4.3%	Link
GVR	Chemicals	31.2	2.81%	1.7	124,600	165.9	1,174	26.5	0.95%	8.9%	
EIB	Banks	22.6	-1.31%	1.0	42,004	239.0	1,856	12.2	5.05%	14.0%	Link
LPB	Banks	32.2	-0.31%	0.3	96,041	45.7	3,333	9.7	0.80%	23.7%	
NAB	Banks	16.9	0.60%	0.0	23,127	47.0	2,809	6.0	1.78%	20.4%	
OCB	Banks	11.8	0.85%	1.0	29,096	44.2	1,189	9.9	19.45%	9.4%	Link
NKG	Basic Resources	13.3	0.38%	1.7	5,930	120.7	1,122	11.8	5.13%	5.9%	Link
ANV	Food & Beverage	22.6	6.86%	1.6	6,017	194.2	612	36.9	2.05%	5.7%	
BAF	Food & Beverage	35.0	-0.57%	0.6	10,641	123.0	1,388	25.2	3.82%	12.2%	
SAB	Food & Beverage	46.6	-0.96%	0.8	59,703	46.0	3,217	14.5	58.95%	17.2%	
VHC	Food & Beverage	58.9	-1.34%	1.3	13,220	124.4	5,567	10.6	22.39%	14.4%	Link
BMP	Construction & Materials	140.4	0.07%	0.8	11,493	17.7	13,288	10.6	85.59%	38.6%	Link
CTD	Construction & Materials	84.8	-0.82%	1.5	8,474	90.0	3,238	26.2	48.73%	3.7%	Link
CTR	Construction & Materials	102.0	-0.78%	1.4	11,667	46.9	4,754	21.5	10.12%	29.3%	Link
DPG	Construction & Materials	43.2	-0.46%	1.7	4,355	34.5	2,336	18.5	7.37%	12.2%	
HHV	Construction & Materials	12.5	0.81%	1.4	5,898	170.5	1,086	11.5	9.93%	5.2%	Link
PC1	Construction & Materials	21.7	-0.91%	1.2	7,761	42.5	1,237	17.6	15.45%	8.1%	Link
VCG	Construction & Materials	23.1	4.54%	1.2	14,901	586.5	915	25.2	8.31%	7.4%	
VGC	Construction & Materials	45.1	0.33%	1.5	20,221	57.1	2,720	16.6	5.56%	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**