STOCK MARKET

The VN-Index continued to rise to the 1,390 level today, but profit-taking pressure pushed the index down to close at 1,381.96 points, a drop of nearly 3 points compared to yesterday. Market breadth was fairly balanced, with 11 out of 18 sectors declining. The Chemicals sector recorded the steepest loss, followed by the Personal & Household Goods sector. On the other hand, the Industrial Goods & Services sector gained over 1%, while the remaining sectors saw insignificant movements. Regarding foreign investors' activity, they were net buyers with a value of nearly VND 2.3 trillion on the HSX today. Selling pressure remains strong in the 1,380 – 1,400 range, so investors should trade cautiously. A sideways consolidation trend is likely to continue in this range in the short term.

FUTURES CONTRACTS

VN30F2512 decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 03/07/2025, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

• VN-Index -2.63 points, closing at 1381.96 points. HNX-Index -0.69 points, closing at 230.93 points.

• Pulling the index up: CTG (+0.76), GEX (+0.39), HPG (+0.30), VHM (+0.29), EIB (+0.25).

• Pulling the index down: GVR (-1.46), VIC (-0.80), BCM (-0.42), STB (-0.39), TCB (-0.25).

• The matched trade value of VN-Index reached VND 30,442 billion, increased 50.81% compared to the previous session. The total transaction value reached VND 33,085 billion.

• The trading range is 15.33 points. The market had 146 gainers, 53 remaining unchanged, 168 losers.

• Foreign investors' net buying value: VND 2275.81 billion on HOSE, including SSI (VND 432.32 billion), MWG (VND 294.15 billion), CTG (VND 146.86 billion), HCM (VND 133.30 billion), VCI (VND 125.84 billion). Foreign investors were net buyers on HNX with the value of VND 43.60 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 +0.15%. Positive stocks: HCM (+2.20%), CTG (+1.43%), DGC (+1.18%).

• BSC50 -0.57%. Positive stocks: GEX (+4.59%), HAH (+3.87%), FRT (+2.76%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.15%	-0.57%	-0.19%	-0.11%
1 week	1.85%	2.58%	1.19%	1.20%
1 months	5.86%	3.88%	2.58%	3.01%
3 months	16.89%	15.98%	14.15%	15.67%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,381.96	230.93	100.86
% 1D	-0.19%	-0.30%	0.25%
TV (VND bn)	30,442	2,463	658
%1D	50.81%	33.76%	14.68%
Foreign (VND bn)	2275.81	43.60	-7.28

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
SSI	432.32	DHC	-32.95
MWG	294.15	HDC	-28.60
CTG	146.86	GVR	-28.50
HCM	133.30	GAS	-25.33
VCI	125.84	VRE	-23.88

Source: FiinPro-X, BSC compiled

Overview of global stock markets

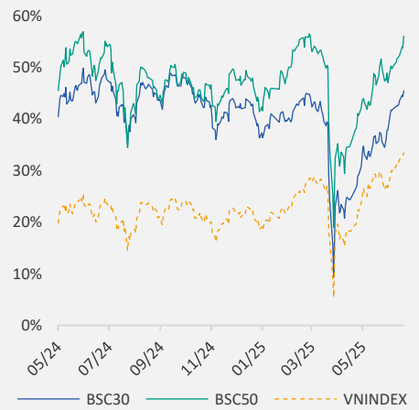
		%D	%W
SPX	6,227	0.47%	2.22%
FTSE100	8,810	0.40%	0.85%
Eurostoxx	5,308	-0.09%	1.20%
Shanghai	3,461	0.18%	0.37%
Nikkei	39,786	-0.16%	0.29%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	68.52	-0.91%
Gold	3,288	-0.03%
Exchange rate		
USD/VND	26,345	0.08%
EUR/VND	31,769	0.33%
JPY/VND	187	0.54%
Interst rates		
10Y-Gov bond rate	3.34%	0.00%
1M-interbank rate	4.04%	

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)
CTG	42.50	1.43%	0.76	5.37
GEX	39.85	4.59%	0.39	0.90
HPG	23.10	0.87%	0.30	6.40
VHM	76.30	0.39%	0.29	4.11
EIB	23.20	2.43%	0.25	1.86

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
GVR	29.60	-5.28%	-1.46	4.00
VIC	94.50	-0.94%	-0.80	3.88
BCM	66.40	-2.64%	-0.42	1.04
STB	46.65	-1.89%	-0.39	1.89
TCB	34.85	-0.43%	-0.25	7.06

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
NVB	12.80	2.40%	0.23	1.17
DTK	12.30	2.50%	0.14	0.68
HGM	281.90	4.41%	0.10	0.01
NFC	66.50	9.92%	0.07	0.02
VCS	49.70	1.22%	0.06	0.16

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
KSV	163.50	-0.43%	-0.09	0.20
IDC	47.80	-0.83%	-0.08	0.33
KSF	65.20	-0.61%	-0.08	0.30
TNG	21.40	-4.46%	-0.08	0.12
MBS	27.30	-0.73%	-0.07	0.57

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
DTL	9.95	6.99%	0.01	0.00
TNI	2.45	6.99%	0.00	0.65
PNC	25.35	6.96%	0.00	0.01
DLG	2.46	6.96%	0.01	9.81
VSC	17.00	6.92%	0.10	24.84

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
SIP	68.90	-6.77%	-0.23	2.29
LHG	31.80	-6.19%	-0.02	0.65
PTL	2.62	-6.09%	0.00	0.22
DAT	7.04	-5.88%	-0.01	0.00
PHR	60.00	-5.66%	-0.11	1.23

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
VC6	27.70	9.92%	0.11	0.00
NFC	66.50	9.92%	0.40	0.01
PEN	9.00	9.76%	0.02	0.00
BDB	10.30	9.57%	0.00	0.00
HJS	29.20	8.96%	0.21	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
CLM	72.70	-9.13%	-0.28	0.00
NST	12.10	-9.02%	-0.05	0.02
CMC	8.50	-8.60%	-0.01	0.00
SVN	4.00	-6.98%	-0.02	0.84
MKV	8.90	-6.32%	-0.01	0.00

Figure 1
Sectors performance

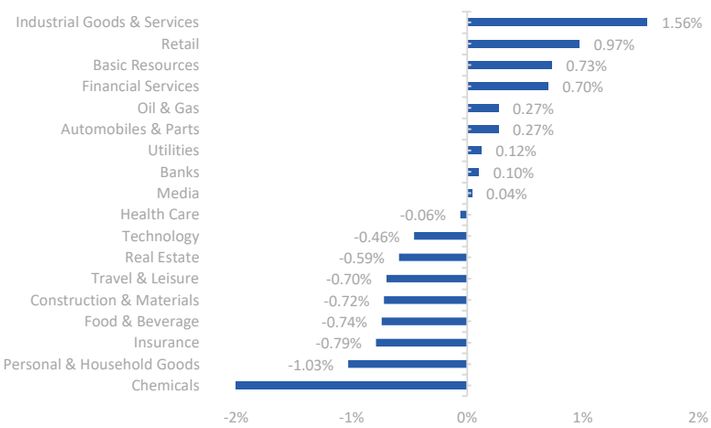
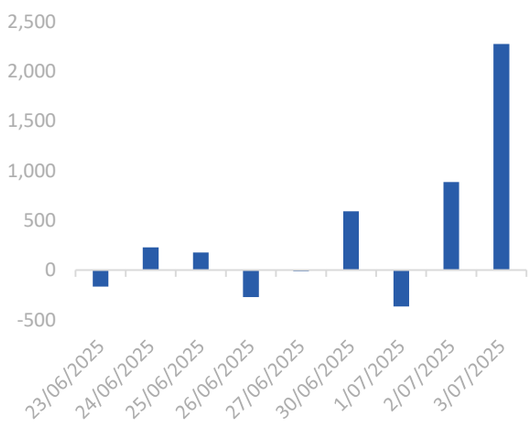


Figure 2
Foreign transactions



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	65.4	0.9%	1.4	95,814	1271.1	2,977	21.8		48.2%	
KBC	Real Estate	26.6	-2.0%	1.7	25,569	373.9	1,620	16.8		18.0%	
KDH	Real Estate	29.4	0.5%	1.1	29,525	65.2	896	32.6		35.1%	
PDR	Real Estate	17.9	0.6%	1.6	16,103	269.9	179	98.9	23,600	9.7%	Link
VHM	Real Estate	76.3	0.4%	1.1	312,163	247.5	7,766	9.8	81,300	10.6%	Link
FPT	Technology	118.0	-0.5%	1.1	175,686	864.6	5,612	21.1	136,500	40.4%	Link
BSR	Oil & Gas	17.9	0.3%	0.0	55,189	47.3	(37)	-484.2		0.2%	
PVS	Oil & Gas	32.1	-0.3%	1.4	15,391	201.2	2,303	14.0	38,600	13.1%	Link
HCM	Financial Services	23.2	2.2%	1.8	24,515	541.8	1,376	16.5		37.0%	
SSI	Financial Services	25.8	1.0%	1.4	50,283	1553.9	1,545	16.5		35.7%	
VCI	Financial Services	36.8	0.8%	1.4	26,211	615.0	1,602	22.8		28.5%	
DCM	Chemicals	33.6	-0.5%	1.7	17,841	114.2	2,805	12.0	37,800	4.9%	Link
DGC	Chemicals	103.0	1.2%	1.5	38,661	419.3	8,224	12.4	109,300	14.8%	Link
ACB	Banks	21.4	0.5%	0.8	109,411	348.2	3,224	6.6	30,400	29.7%	Link
BID	Banks	36.3	-0.3%	0.9	255,578	221.4	3,643	10.0	47,000	17.5%	Link
CTG	Banks	42.5	1.4%	1.0	225,003	457.2	4,806	8.7	50,000	27.1%	Link
HDB	Banks	22.6	1.1%	0.9	77,940	509.6	3,985	5.6	26,400	16.5%	Link
MBB	Banks	26.0	-0.4%	0.9	158,964	822.9	4,049	6.4	28,200	23.2%	Link
MSB	Banks	12.2	-0.8%	1.1	31,850	217.4	2,150	5.7	14,000	27.6%	Link
STB	Banks	46.7	-1.9%	0.9	89,642	952.9	5,767	8.2		19.8%	
TCB	Banks	34.9	-0.4%	1.2	247,270	1123.1	3,013	11.6	33,100	22.5%	Link
TPB	Banks	13.8	1.1%	1.0	35,931	378.4	2,383	5.7	-	23.0%	Link
VCB	Banks	57.9	-0.2%	0.5	484,629	439.6	4,063	14.3	69,200	22.1%	Link
VIB	Banks	18.4	0.3%	0.8	54,518	247.9	2,400	7.6	23,000	5.0%	Link
VPB	Banks	18.7	0.3%	0.9	147,571	934.3	2,030	9.2	24,000	24.6%	Link
HPG	Basic Resources	23.1	0.9%	1.1	175,769	1117.2	1,628	14.1	35,800	22.3%	Link
HSG	Basic Resources	17.1	0.6%	1.5	10,557	288.3	749	22.7	16,800	8.4%	Link
DBC	Food & Beverage	34.3	-0.9%	1.8	11,580	429.0	3,930	8.8	32,200	5.6%	Link
MSN	Food & Beverage	74.5	-0.9%	1.4	108,164	461.6	1,518	49.5	82,500	25.3%	Link
VNM	Food & Beverage	57.5	-0.4%	0.5	120,590	309.7	4,194	13.8	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	-2.13%	1.8	9,797	194.7	2,098	21.3	26.82%	15.7%	Link
FRT	Retail	186.0	2.76%	1.2	24,660	148.3	3,279	55.2	32.19%	24.0%	Link
BVH	Insurance	53.0	-0.93%	1.1	39,714	32.1	2,975	18.0	27.24%	9.7%	
DIG	Real Estate	17.7	1.44%	1.4	11,248	394.3	303	57.4	2.75%	2.5%	
DXG	Real Estate	16.9	1.50%	1.5	16,964	217.9	310	53.8	23.70%	2.5%	Link
HDC	Real Estate	25.5	0.00%	1.3	4,539	162.7	443	57.5	3.70%	3.4%	
HDG	Real Estate	25.3	-0.78%	1.5	9,434	87.8	762	33.5	18.38%	4.6%	Link
IDC	Real Estate	47.8	-0.83%	1.4	15,906	380.5	4,982	9.7	18.61%	31.2%	
NLG	Real Estate	39.0	0.13%	1.6	14,999	142.0	1,827	21.3	47.17%	7.4%	Link
SIP	Real Estate	68.9	-6.77%	1.4	15,558	162.4	6,076	12.2	4.12%	29.7%	
SZC	Real Estate	37.0	-5.13%	1.7	7,019	293.9	2,036	19.2	2.93%	11.8%	Link
TCH	Real Estate	19.8	-1.00%	1.7	13,364	163.8	1,279	15.6	10.54%	9.1%	Link
VIC	Real Estate	94.5	-0.94%	1.2	364,777	179.4	2,823	33.8	7.46%	8.0%	
VRE	Real Estate	25.1	-0.60%	1.2	57,262	171.3	1,844	13.7	17.93%	10.1%	Link
CMG	Technology	40.8	0.00%	1.2	8,621	117.2	1,654	24.7	36.27%	12.5%	Link
PLX	Oil & Gas	37.0	0.14%	1.0	46,948	29.1	1,535	24.1	17.16%	7.6%	Link
PVD	Oil & Gas	19.9	0.76%	1.5	10,979	85.4	1,246	15.9	3.43%	4.4%	Link
FTS	Financial Services	39.8	-0.13%	2.0	13,808	365.5	1,649	24.2	27.99%	13.7%	
MBS	Financial Services	27.3	-0.73%	1.8	15,752	229.4	1,650	16.7	6.32%	12.9%	
GAS	Utilities	66.2	-0.30%	0.8	155,553	61.0	4,543	14.6	1.90%	17.0%	Link
POW	Utilities	13.3	2.71%	1.0	30,210	328.8	546	23.6	3.29%	4.0%	Link
REE	Utilities	66.9	0.90%	1.0	35,912	106.8	3,922	16.9	49.00%	11.4%	Link
VJC	Travel & Leisure	89.0	-1.33%	0.6	53,363	64.5	2,769	32.6	11.88%	8.9%	
GEX	Industrial Goods & Services	39.9	4.59%	1.7	34,381	1029.8	1,954	19.5	9.34%	12.8%	Link
GMD	Industrial Goods & Services	60.5	0.83%	1.2	25,212	384.7	3,797	15.8	40.54%	11.9%	Link
HAH	Industrial Goods & Services	69.7	3.87%	1.3	8,716	398.9	5,594	12.0	4.73%	25.8%	Link
PVT	Industrial Goods & Services	17.9	0.56%	1.4	8,341	44.5	2,293	7.7	9.80%	14.2%	Link
VTP	Industrial Goods & Services	117.4	0.77%	0.0	14,188	198.2	3,235	36.0	5.79%	24.9%	
PNJ	Personal & Household Goods	82.5	-0.48%	1.0	28,012	75.5	6,105	13.6	48.95%	18.6%	Link
TCM	Personal & Household Goods	32.0	-3.03%	1.1	3,697	181.6	2,608	12.7	49.97%	13.2%	
TNG	Personal & Household Goods	21.4	-4.46%	1.3	2,746	150.1	2,580	8.7	17.08%	17.0%	Link
DPM	Chemicals	38.5	-0.77%	1.4	15,184	209.3	1,223	31.7	7.82%	4.3%	Link
GVR	Chemicals	29.6	-5.28%	2.3	125,000	402.6	1,174	26.6	0.96%	8.9%	
EIB	Banks	23.2	2.43%	1.0	42,191	563.7	1,856	12.2	5.12%	14.0%	Link
LPB	Banks	32.5	0.46%	0.7	96,639	93.0	3,333	9.7	0.80%	23.7%	
NAB	Banks	17.0	-1.45%	0.0	23,608	64.6	2,809	6.1	1.84%	20.4%	
OCB	Banks	12.0	0.42%	1.0	29,466	74.5	1,189	10.1	19.46%	9.4%	Link
NKG	Basic Resources	13.7	0.37%	1.4	6,087	304.7	1,122	12.1	5.37%	5.9%	Link
ANV	Food & Beverage	22.6	-4.24%	1.7	6,284	154.9	612	38.6	2.50%	5.7%	
BAF	Food & Beverage	34.0	-0.29%	0.8	10,352	183.3	1,387	24.5	3.79%	12.2%	
SAB	Food & Beverage	46.3	-0.32%	1.2	59,511	74.6	3,217	14.4	58.90%	17.2%	
VHC	Food & Beverage	57.4	-5.59%	1.4	13,647	220.5	5,567	10.9	22.45%	14.4%	Link
BMP	Construction & Materials	139.4	-1.06%	1.0	11,534	14.5	13,288	10.6	85.67%	38.6%	Link
CTD	Construction & Materials	83.2	-1.30%	1.4	8,424	121.8	3,238	26.0	48.73%	3.7%	Link
CTR	Construction & Materials	100.5	-0.10%	1.6	11,507	59.5	4,754	21.2	10.13%	29.3%	Link
DPG	Construction & Materials	43.3	0.00%	1.4	4,365	51.9	2,336	18.5	7.28%	12.2%	
HHV	Construction & Materials	12.4	0.00%	1.5	5,875	130.2	1,086	11.4	10.07%	5.2%	Link
PC1	Construction & Materials	21.8	-0.23%	1.5	7,797	50.0	1,237	17.6	15.37%	8.1%	Link
VCG	Construction & Materials	23.0	1.32%	1.5	14,675	472.9	915	24.8	8.39%	7.4%	
VGC	Construction & Materials	44.6	-4.09%	1.6	20,848	82.2	2,720	17.1	5.62%	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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