Vietnam Daily Review

VN-INDEX RETURNED TO 1,400

Monday, 7 July 2025

STOCK MARKET

The VN-Index rose by more than 15 points today, closing at 1,402.06 points. Market breadth was positive, with 15 out of 18 sectors gaining, led by Media, followed by Banking, Automobiles & Parts, Basic Resources, and others. Regarding foreign investors' activity, they continued to record strong net buying on the HSX, with a net inflow of over VND 1.2 trillion today. Notably, the index broke out above the psychological 1,400-point level for the first time since April 2022, with improved trading volume. In the upcoming sessions, the VN-Index is likely to continue its upward momentum towards the 1,410 – 1,420 range.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

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

HIGHLIGHT

• VN-Index +15.09 points, closing at 1402.06 points. HNX-Index +3.39 points, closing at 235.9 points.

• Pulling the index up: CTG (+2.19), BID (+1.07), VPB (+1.03), VIC (+1.00), SHB (+0.90).

• Pulling the index down: GEX (-0.20), HVN (-0.20), BVH (-0.07), FRT (-0.06), PLX (-0.04).

• The matched trade value of VN-Index reached VND 26,337 billion, increased 32.31% compared to the previous session. The total transaction value reached VND 28,326 billion.

• The trading range is 15.35 points. The market had 224 gainers, 60 remaining unchanged, 87 losers.

• Foreign investors' net buying value: VND 1227.28 billion on HOSE, including SHB (VND 553.21 billion), FPT (VND 287.94 billion), SSI (VND 197.74 billion), HPG (VND 153.39 billion), CTG (VND 126.61 billion). Foreign investors were net buyers on HNX with the value of VND 66.77 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 +1.40%. Positive stocks: CTG (+3.98%), HDB (+3.33%), PDR (+3.27%).

• BSC50 +0.64%. Positive stocks: TCH (+6.94%), NAB (+2.62%), OCB (+2.48%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	1.40%	0.64%	1.09%	1.34%
1 week	0.93%	1.44%	1.89%	2.10%
1 months	7.67%	4.27%	5.43%	6.32%
3 months	26.31%	24.79%	23.77%	25.98%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,402.06	235.90	101.61
% 1D	1.09%	1.46%	0.43%
TV (VND bn)	26,337	2,078	601
%1D	32.31%	38.02%	4.42%
Foreign (VND bn)	1227.28	66.77	-37.14

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
SHB	553.21	GEX	-316.32
FPT	287.94	VCB	-138.26
SSI	197.74	MWG	-59.73
HPG	153.39	NKG	-30.12
CTG	126.61	HAH	-29.94

Source: FiinPro-X, BSC compiled

Overview of global stock markets

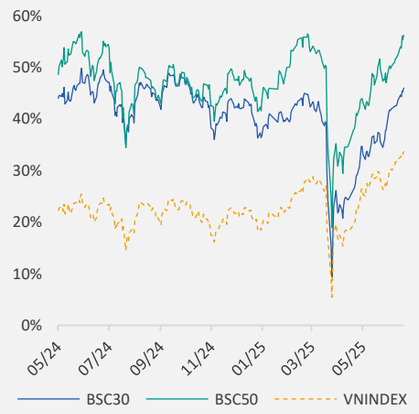
		%D	%W
SPX	6,279	0.83%	2.25%
FTSE100	8,820	-0.04%	0.67%
Eurostoxx	5,299	0.11%	-0.27%
Shanghai	3,473	0.02%	0.83%
Nikkei	39,588	-0.56%	-2.22%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	68.69	0.57%
Gold	3,288	-0.03%
Exchange rate		
USD/VND	26,320	-0.11%
EUR/VND	31,601	-0.16%
JPY/VND	185	-0.54%
Interst rates		
10Y-Gov bond rate	3.34%	0.00%
1M-interbank rate	3.82%	

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	44.40	3.98%	2.19	5.37
BID	37.20	1.78%	1.07	7.02
VPB	19.30	2.93%	1.03	7.93
VIC	93.00	1.20%	1.00	3.88
SHB	13.90	6.92%	0.90	4.07

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
GEX	39.00	-2.50%	-0.20	0.90
HVN	38.00	-1.04%	-0.20	2.21
BVH	54.50	-0.73%	-0.07	0.74
FRT	186.40	-1.06%	-0.06	0.14
PLX	37.10	-0.40%	-0.04	1.27

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
NVB	15.40	10.00%	1.16	1.17
SHS	14.10	4.44%	0.36	0.89
CEO	18.90	5.00%	0.33	0.54
DTK	12.80	4.07%	0.23	0.68
MBS	28.00	2.19%	0.22	0.57

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
DNP	19.50	-8.88%	-0.16	0.14
HHC	111.00	-9.98%	-0.12	0.02
NFC	58.70	-9.69%	-0.06	0.02
SEB	46.50	-4.52%	-0.04	0.03
VCS	48.70	-0.81%	-0.04	0.16

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
FUEIP100	9.84	6.96%	0.00	0.00
LGL	4.47	6.94%	0.00	0.65
TCH	22.35	6.94%	0.24	13.08
SHB	13.90	6.92%	0.89	255.69
VPH	5.59	6.88%	0.01	0.85

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
GDT	21.70	-5.86%	-0.01	0.64
SFI	27.60	-5.15%	-0.01	0.00
CMV	8.00	-4.42%	0.00	0.01
PMG	7.46	-3.12%	0.00	0.00
NAF	24.25	-3.00%	-0.01	0.69

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BBS	20.00	9.89%	0.04	0.00
INN	63.40	9.88%	0.42	0.00
GKM	4.50	9.76%	0.05	0.78
HKT	10.40	9.47%	0.02	0.00
V21	7.10	9.23%	0.03	0.02

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
HHC	111.00	-9.98%	-0.68	0.00
SMT	9.10	-9.90%	-0.02	0.01
VE3	7.40	-9.76%	0.00	0.00
KDM	14.90	-9.70%	-0.04	0.05
NFC	58.70	-9.69%	-0.34	0.00

Figure 1
Sectors performance

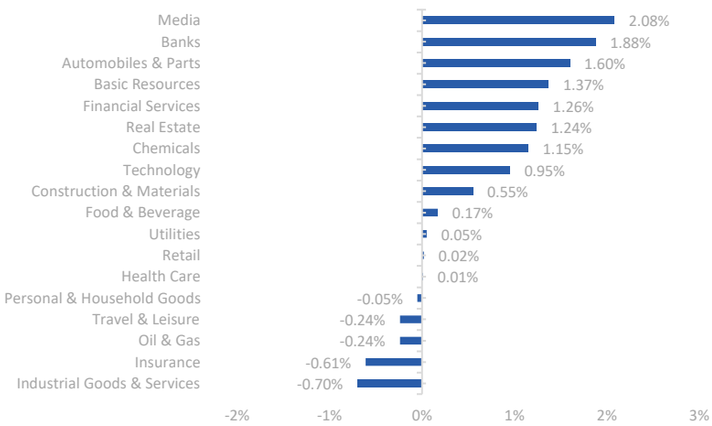
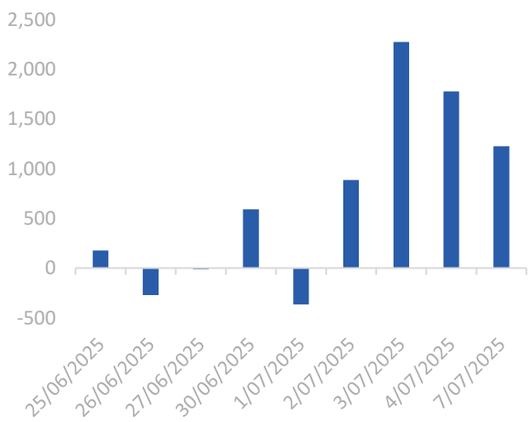


Figure 2
Foreign transactions



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	66.5	0.3%	1.4	98,328	558.8	2,976	22.3		48.7%	
KBC	Real Estate	27.0	0.6%	1.3	25,380	150.4	1,615	16.7		18.1%	
KDH	Real Estate	30.0	1.0%	1.2	30,334	85.0	896	33.5		35.1%	
PDR	Real Estate	19.0	3.3%	1.5	17,192	372.3	179	105.7	23,600	10.0%	Link
VHM	Real Estate	76.9	1.2%	1.0	315,860	267.1	7,766	9.9	81,300	10.6%	Link
FPT	Technology	123.8	1.1%	0.8	183,389	924.6	5,611	22.1	136,500	40.7%	Link
BSR	Oil & Gas	18.0	0.0%	0.0	55,654	46.5	(37)	-488.3		0.3%	
PVS	Oil & Gas	32.1	-0.3%	1.5	15,343	177.4	2,303	13.9	38,600	12.5%	Link
HCM	Financial Services	23.8	1.1%	1.5	25,649	296.7	1,367	17.4		38.3%	
SSI	Financial Services	26.3	1.5%	1.2	51,860	895.5	1,545	17.0		36.6%	
VCI	Financial Services	37.1	1.1%	1.4	26,808	421.9	1,602	23.2		29.0%	
DCM	Chemicals	33.8	1.1%	1.3	17,867	137.3	2,805	12.0	37,800	4.8%	Link
DGC	Chemicals	102.2	0.2%	1.5	38,813	268.6	8,224	12.4	109,300	15.0%	Link
ACB	Banks	22.3	1.8%	0.9	114,291	418.2	3,224	6.9	30,400	29.9%	Link
BID	Banks	37.2	1.8%	1.0	261,195	416.9	3,643	10.2	47,000	17.5%	Link
CTG	Banks	44.4	4.0%	1.2	238,428	548.8	4,806	9.2	50,000	27.2%	Link
HDB	Banks	23.3	3.3%	1.1	81,435	636.5	3,985	5.9	26,400	16.4%	Link
MBB	Banks	26.4	1.5%	1.0	161,100	503.4	4,049	6.5	28,200	23.2%	Link
MSB	Banks	12.5	2.9%	1.1	32,500	365.4	2,150	5.8	14,000	27.6%	Link
STB	Banks	47.6	1.1%	1.1	89,642	518.6	5,767	8.2		19.8%	
TCB	Banks	35.3	1.0%	1.1	249,389	552.7	3,013	11.7	33,100	22.5%	Link
TPB	Banks	14.2	2.9%	1.1	37,384	368.3	2,383	5.9	-	23.0%	Link
VCB	Banks	58.6	0.3%	0.8	489,643	479.2	4,063	14.4	69,200	22.1%	Link
VIB	Banks	18.7	1.6%	1.0	55,710	263.6	2,400	7.8	23,000	5.0%	Link
VPB	Banks	19.3	2.9%	0.9	153,125	1059.5	2,030	9.5	24,000	24.6%	Link
HPG	Basic Resources	23.6	1.5%	1.3	181,141	854.5	1,628	14.5	35,800	22.3%	Link
HSG	Basic Resources	17.4	2.4%	1.5	10,774	230.1	749	23.2	16,800	8.1%	Link
DBC	Food & Beverage	34.8	0.4%	1.5	11,630	276.7	3,930	8.8	32,200	6.5%	Link
MSN	Food & Beverage	74.8	0.3%	1.3	107,589	440.2	1,518	49.3	82,500	25.4%	Link
VNM	Food & Beverage	57.9	0.2%	0.7	121,008	218.4	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	44.1	0.57%	1.5	9,654	102.9	2,098	21.0	27.15%	15.7%	Link
FRT	Retail	186.4	-1.06%	0.9	25,396	259.0	3,279	56.9	32.32%	24.0%	Link
BVH	Insurance	54.5	-0.73%	1.2	40,457	16.5	2,975	18.3	27.26%	9.7%	
DIG	Real Estate	18.6	1.92%	1.5	12,024	401.9	303	61.4	4.17%	2.5%	
DXG	Real Estate	17.3	0.88%	1.6	17,576	238.2	310	55.7	24.03%	2.5%	Link
HDC	Real Estate	26.4	2.33%	1.3	4,700	240.1	443	59.6	3.45%	3.4%	
HDG	Real Estate	25.6	0.99%	1.4	9,471	78.0	762	33.6	17.91%	4.6%	Link
IDC	Real Estate	46.9	1.08%	1.4	15,477	96.4	4,982	9.4	19.65%	31.2%	
NLG	Real Estate	39.5	0.89%	1.4	15,210	104.6	1,827	21.6	47.08%	7.4%	Link
SIP	Real Estate	70.6	2.32%	1.3	14,864	78.6	6,076	11.6	4.10%	29.7%	
SZC	Real Estate	37.2	-0.27%	1.1	6,695	91.6	2,036	18.3	3.07%	11.8%	Link
TCH	Real Estate	22.4	6.94%	1.4	14,935	287.0	1,279	17.5	10.85%	9.1%	Link
VIC	Real Estate	93.0	1.20%	1.0	355,601	186.7	2,823	33.0	6.76%	8.0%	
VRE	Real Estate	25.5	1.39%	0.9	57,944	95.0	1,844	13.8	17.94%	10.1%	Link
CMG	Technology	41.0	-0.85%	1.3	8,663	69.2	1,650	24.9	36.31%	12.4%	Link
PLX	Oil & Gas	37.1	-0.40%	1.1	47,139	36.6	1,535	24.2	17.16%	7.6%	Link
PVD	Oil & Gas	20.0	-0.74%	1.3	11,118	104.5	1,246	16.1	3.68%	4.4%	Link
FTS	Financial Services	39.9	1.27%	1.5	13,825	209.7	1,649	24.2	28.02%	13.7%	
MBS	Financial Services	28.0	2.19%	1.6	16,038	188.4	1,650	17.0	6.17%	12.9%	
GAS	Utilities	66.5	0.15%	1.1	155,788	33.5	4,543	14.6	1.89%	17.0%	Link
POW	Utilities	13.5	0.00%	1.3	31,498	182.4	546	24.6	3.32%	4.0%	Link
REE	Utilities	66.5	-0.15%	0.8	36,020	57.6	3,922	17.0	49.00%	11.4%	Link
VJC	Travel & Leisure	90.0	0.22%	0.7	53,245	84.1	2,765	32.6	11.16%	8.9%	
GEX	Industrial Goods & Services	39.0	-2.50%	1.5	35,194	808.5	1,954	20.0	9.35%	12.8%	Link
GMD	Industrial Goods & Services	60.4	-0.17%	1.2	25,380	175.9	3,797	15.9	41.04%	11.9%	Link
HAH	Industrial Goods & Services	68.1	-1.30%	1.2	8,846	176.6	5,594	12.2	4.95%	25.8%	Link
PVT	Industrial Goods & Services	17.9	-0.28%	1.2	8,388	36.4	2,293	7.8	9.78%	14.2%	Link
VTP	Industrial Goods & Services	120.6	-0.33%	0.0	14,687	182.9	3,235	37.3	6.02%	24.9%	
PNJ	Personal & Household Goods	82.5	-0.24%	1.2	27,877	27.4	6,105	13.5	49.00%	18.6%	Link
TCM	Personal & Household Goods	31.1	0.32%	1.0	3,484	60.5	2,608	11.9	49.89%	13.2%	
TNG	Personal & Household Goods	21.1	0.96%	1.6	2,587	31.6	2,580	8.2	16.84%	17.0%	Link
DPM	Chemicals	38.8	0.91%	1.2	15,184	210.7	1,223	31.7	7.90%	4.3%	Link
GVR	Chemicals	29.8	1.54%	1.4	119,000	82.6	1,174	25.3	0.96%	8.9%	
EIB	Banks	23.7	1.07%	1.1	44,053	584.2	1,856	12.7	5.21%	14.0%	Link
LPB	Banks	33.5	2.29%	0.5	100,074	178.9	3,333	10.1	0.80%	23.7%	
NAB	Banks	17.6	2.62%	0.0	24,157	57.9	2,809	6.3	1.84%	20.4%	
OCB	Banks	12.4	2.48%	1.0	30,576	95.5	1,189	10.4	19.46%	9.4%	Link
NKG	Basic Resources	13.7	0.37%	1.5	6,132	159.3	1,122	12.2	5.37%	5.9%	Link
ANV	Food & Beverage	23.6	-1.26%	1.6	6,284	65.3	612	38.6	2.96%	5.7%	
BAF	Food & Beverage	34.1	0.89%	0.7	10,352	100.1	1,382	24.6	3.37%	12.2%	
SAB	Food & Beverage	46.4	0.00%	0.7	59,511	64.7	3,217	14.4	58.86%	17.2%	
VHC	Food & Beverage	58.0	0.35%	1.3	13,018	54.6	5,567	10.4	22.36%	14.4%	Link
BMP	Construction & Materials	140.3	0.94%	0.9	11,485	17.3	13,288	10.6	85.69%	38.6%	Link
CTD	Construction & Materials	84.0	-0.24%	1.5	8,394	96.7	3,238	25.9	48.70%	3.7%	Link
CTR	Construction & Materials	101.8	0.10%	1.3	11,644	45.2	4,754	21.4	9.91%	29.3%	Link
DPG	Construction & Materials	44.7	1.13%	1.6	4,506	82.6	2,336	19.1	7.21%	12.2%	
HHV	Construction & Materials	12.7	1.60%	1.4	6,017	140.9	1,085	11.7	9.83%	5.2%	Link
PC1	Construction & Materials	21.9	0.00%	1.2	7,814	45.5	1,237	17.7	15.07%	8.1%	Link
VCG	Construction & Materials	22.9	0.22%	1.3	14,804	184.2	915	25.0	8.43%	7.4%	
VGC	Construction & Materials	44.5	0.45%	1.4	19,952	20.3	2,720	16.4	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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