

STOCK MARKET

The VN-Index surged to 1,275 points right after the opening of the morning session. However, profit-taking pressure at this level pushed the index back to 1,265 points before closing at 1,269.93 points, remaining flat compared to the previous session. The market breadth tilted towards the negative side with 14 out of 18 sectors declining; however, the declines were not significant. On the other hand, the Financial Services sector led the gainers, followed by Basic Resources, Insurance, and Banking sectors. Regarding foreign trading, today, foreign investors recorded net sales on both the HSX and HNX exchanges. The trend of seeking balance around the 1,270 level has not ended, and investors should trade cautiously in the coming sessions.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 07/10/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-0.67** points, closing at **1269.93** points. HNX-Index **-0.20** points, closing at **232.47** points.
- Pulling the index up: **STB (+0.33)**, **HPG (+0.31)**, **CTG (+0.26)**, **MSB (+0.23)**, **VCI (+0.20)**.
- Pulling the index down: **VNM (-0.69)**, **VCB (-0.41)**, **VHM (-0.31)**, **HDB (-0.31)**, **MSN (-0.28)**.
- The matched trade value of VN-Index reached VND **10,692** billion, decreased **-15.56%** compared to the previous session. The total transaction value reached VND 11,800 billion.
- The trading range is 13.96 points. The market had **170** gainers, 86 remaining unchanged, **202** losers.
- Foreign investors' net selling value: VND **-337.30** billion on HOSE, including **VPB (VND -93.58 billion)**, **HDB (VND -87.67 billion)**, **VCG (VND -41.44 billion)**, **OCB (VND -32.36 billion)**, **GEX (VND -30.97 billion)**. Foreign investors were net sellers on HNX with the value of VND **-56.67** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.38%**. Positive stocks: **PVS (+1.72%)**, **PVD (+1.65%)**, **CTR (+1.43%)**.
- BSC50 **-0.60%**. Positive stocks: **PLX (+1.58%)**, **PDR (+0.97%)**, **BSI (+0.79%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.38%	-0.60%	-0.59%	-0.76%
1 week	-1.03%	-1.77%	-0.99%	-0.45%
1 months	1.59%	1.94%	1.77%	2.38%
3 months	-1.03%	-4.47%	-0.96%	1.48%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,269.93	232.47	92.47
% 1D	-0.05%	-0.09%	0.11%
TV (bil VND)	10,692	807	331
%1D	-15.56%	-27.38%	-37.25%
Foreign (bil VND)	-337.30	-56.67	-0.13

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
STB	63.37	VPB	-93.58
TCB	40.15	HDB	-87.67
MWG	33.46	VCG	-41.44
EIB	22.10	OCB	-32.36
FRT	21.76	GEX	-30.97

Overview of global stock markets

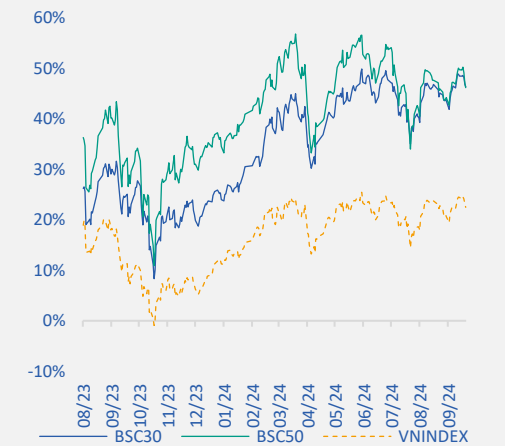
		%D	%W
SPX	5,751	0.90%	0.22%
FTSE100	8,274	-0.09%	0.44%
Eurostoxx	4,938	-0.54%	-1.49%
Shanghai	3,337	8.06%	21.37%
Nikkei	39,406	2.05%	3.96%

Source: Bloomberg

	Close	%
Commodities		
Brent	78	-0.40%
Gold	2,653	0.26%
Exchange rate		
USD/VND	25,030	0.36%
EUR/VND	28,029	-0.09%
JPY/VND	171	-0.58%
Interest rates		
10Y-Gov bond rate	2.69%	-0.08%
1M-interbank rate	4.77%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
STB	33.80	2.11%	0.33	1.89
HPG	26.40	0.76%	0.31	6.40
CTG	35.80	0.56%	0.26	5.37
MSB	13.00	2.77%	0.23	2.60
VCI	37.60	3.72%	0.20	0.57

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PVS	42.00	1.20%	0.17	0.48
MBS	31.70	1.28%	0.16	0.55
KSV	53.60	0.75%	0.06	0.20
IDC	56.40	0.36%	0.05	0.33
SEB	49.00	4.26%	0.05	0.03

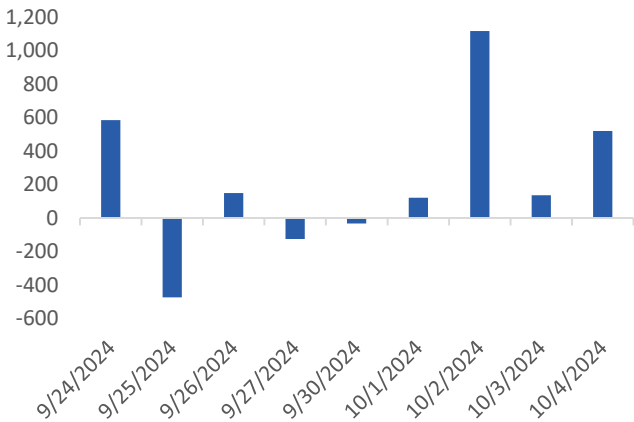
Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
MSH	47.50	6.98%	0.06	0.50
HHV	10.75	6.97%	0.08	9.46
BMC	21.60	6.93%	0.00	0.44
VRC	8.81	6.92%	0.01	0.15
STG	43.95	6.80%	0.07	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BPC	14.40	9.92%	0.01	0.03
DTC	8.90	9.88%	0.01	0.00
HTC	5.60	9.80%	0.02	0.06
PIA	23.90	9.63%	0.14	0.00
PCT	34.00	8.97%	0.05	0.00

Figure 1
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VNM	67.10	-2.04%	-0.69	2.09
VCB	92.00	-0.33%	-0.41	5.59
VHM	41.20	-0.72%	-0.31	4.35
HDB	26.85	-1.65%	-0.31	2.91
MSN	74.80	-1.06%	-0.28	1.44

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
DNP	22.00	-9.47%	-0.21	0.14
DTK	12.50	-3.10%	-0.19	0.68
NTP	59.50	-1.33%	-0.07	0.13
SHS	15.70	-0.63%	-0.06	0.81
THD	35.20	-0.56%	-0.05	0.38

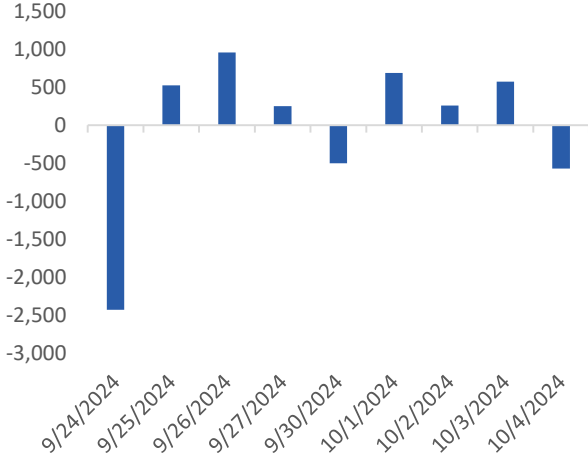
Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HVN	10.00	-6.98%	-0.01	1.92
HAG	10.75	-6.93%	-0.19	35.41
HHS	8.61	-6.92%	-0.05	3.41
NHA	23.55	-6.92%	-0.02	1.42
DXV	4.59	-6.90%	0.00	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
DAE	12.80	-9.86%	-0.01	0.00
HMR	21.10	-9.83%	-0.04	0.20
CMS	18.40	-9.80%	-0.17	0.61
TXM	6.50	-9.72%	-0.02	0.04
MCO	12.20	-9.63%	-0.02	0.05

Figure 2
Foreign transactions



Source: FiinProX, BSC Research

BSC30 PORTFOLIO

Stocks	Sector	Close (1,000 VND)	% Day	Beta	MC (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	TP (VND)	Foreign ownershi- p	Link
VCB	Bank	92.0	-0.30%	0.6	20,780	2.3	5,962	15.4	105,000	23.3%	Link
BID	Bank	49.0	-0.30%	1.1	11,300	3.0	4,006	12.2	54,578	17.2%	Link
VPB	Bank	20.0	0.00%	1.0	6,412	21.0	1,461	13.7	23,685	26.1%	Link
TCB	Bank	24.2	0.40%	1.2	6,876	12.5	3,047	7.9	-	20.9%	Link
MBB	Bank	25.2	0.40%	1.0	5,404	10.4	4,018	6.3	24,400	23.2%	Link
STB	Bank	33.8	2.10%	1.3	2,575	20.2	4,340	7.8	31,200	22.9%	Link
CTG	Bank	35.8	0.60%	1.3	7,769	7.7	3,782	9.5	19,100	26.3%	Link
ACB	Bank	25.4	0.20%	0.8	4,594	7.0	3,676	6.9	42,500	30.0%	Link
SSI	Broker	27.6	1.10%	1.4	2,188	10.8	1,882	14.7	45,900	41.3%	Link
IDC	IP	56.4	0.40%	1.2	752	1.1	5,573	10.1	-	24.5%	Link
HPG	Material	26.4	0.80%	1.1	6,824	13.3	1,746	15.1	23,300	23.7%	Link
HSG	Material	21.0	0.00%	1.6	524	5.6	1,844	11.4	79,900	17.3%	Link
VHM	RE	41.2	-0.70%	0.9	7,250	12.0	5,350	7.7	38,900	14.2%	Link
KDH	RE	37.8	0.80%	1.3	1,387	3.2	765	49.3	44,100	38.1%	Link
NLG	RE	40.3	1.00%	1.2	627	1.5	1,102	36.6	46,100	48.8%	Link
DGC	Chemicals	114.0	0.40%	1.5	1,750	5.7	7,898	14.4	85,000	18.1%	Link
DCM	Fertilizer	37.6	-0.10%	1.3	806	3.0	2,828	13.3	41,000	7.4%	Link
GAS	O&G	72.9	-0.50%	0.6	6,902	1.7	4,760	15.3	36,000	1.9%	Link
PVS	O&G	42.0	1.20%	1.0	811	5.7	1,932	21.7	110,500	22.1%	Link
PVD	O&G	28.0	0.90%	1.4	628	3.2	1,155	24.2	45,000	15.6%	Link
POW	Utilities	12.8	-1.50%	0.6	1,207	2.4	463	27.5	38,500	4.1%	Link
VHC	Fishery	70.0	0.70%	1.4	635	1.2	3,234	21.6	29,000	29.8%	Link
GMD	Logistics	76.4	-0.50%	0.9	959	1.1	4,054	18.8	14,500	48.6%	Link
VNM	Retail	67.1	-2.00%	0.6	5,667	16.2	4,633	14.5	81,700	51.5%	Link
MSN	Retail	74.8	-1.10%	1.2	4,573	12.5	466	160.4	27,700	28.6%	Link
MWG	Retail	66.3	-0.20%	1.2	3,917	14.9	1,507	44.0	63,800	46.9%	Link
PNJ	Retail	95.4	0.00%	1.0	1,303	3.0	6,132	15.6	83,500	49.0%	Link
DGW	Retail	45.7	-0.70%	1.8	401	1.5	2,236	20.4	90,900	25.1%	Link
FPT	Tech	134.1	0.00%	1.1	7,915	7.2	4,890	27.4	57,000	45.2%	Link
CTR	Tech	128.0	0.00%	1.4	592	0.7	4,590	27.9	108,000	9.4%	Link

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 (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	P/B	Foreign ownershi- p	ROE (%)
HDB	Bank	26.8	-1.60%	1.0	3,160	10.3	4,137	6.5	1.6	19.5%	27.8%
VIB	Bank	19.2	-0.30%	1.1	2,312	5.2	3,048	6.3	1.3	20.5%	21.4%
TPB	Bank	17.5	1.40%	1.2	1,868	11.8	2,154	8.1	1.1	28.4%	14.2%
MSB	Bank	13.0	2.80%	1.1	1,366	7.7	2,366	5.5	0.8	29.5%	14.9%
EIB	Bank	18.8	1.10%	0.7	1,419	6.1	1,273	14.8	1.4	2.8%	9.9%
HCM	Broker	31.1	2.10%	1.6	885	10.6	1,397	22.3	2.1	45.3%	10.6%
VCI	Broker	37.6	3.70%	1.6	873	14.1	1,763	21.3	1.9	20.1%	9.6%
VND	Broker	15.0	2.00%	1.5	920	6.4	1,591	9.4	1.3	13.5%	15.0%
BSI	Broker	52.2	1.80%	1.7	471	1.7	2,165	24.1	2.2	40.0%	9.3%
SHS	Broker	15.7	-0.60%	1.7	516	7.0	1,338	11.7	1.2	8.9%	10.5%
CTD	Const	61.4	-0.20%	1.4	248	1.0	2,996	20.5	0.7	47.1%	3.6%
HHV	Const	11.8	-0.80%	1.7	206	1.8	869	13.6	0.6	7.7%	4.4%
LCG	Const	10.6	-0.90%	1.6	82	0.4	766	13.8	0.8	2.1%	5.7%
SZC	IP	36.2	0.30%	1.1	263	0.7	1,549	23.4	2.2	3.2%	12.1%
SIP	IP	71.5	-0.60%	1.4	608	1.3	5,931	12.1	3.3	2.0%	29.0%
PHR	IP	57.9	-0.50%	1.0	317	0.5	3,028	19.1	2.1	18.5%	12.1%
DIG	RE	21.7	-0.20%	1.7	535	3.8	151	143.7	1.7	4.7%	1.1%
CEO	RE	15.2	0.00%	1.8	332	1.3	318	47.8	1.3	4.8%	2.1%
KBC	IP	27.2	0.00%	1.6	844	3.0	300	90.7	1.1	20.5%	1.7%
VGC	IP	43.0	-0.80%	1.3	779	1.0	1,776	24.2	2.4	4.7%	8.2%
GVR	IP	34.8	-0.30%	1.5	5,625	2.2	693	50.2	2.7	0.5%	6.5%
NKG	Material	21.8	0.20%	1.6	231	2.0	1,580	13.8	1.0	13.1%	7.4%
BMP	Material	113.7	-1.80%	1.3	376	0.9	11,420	10.0	3.5	82.6%	34.6%
IJC	RE	13.3	0.40%	1.4	203	0.5	683	19.5	1.0	4.6%	6.0%
DXG	RE	15.2	0.00%	1.5	443	3.9	249	61.1	1.0	15.4%	1.9%
VRE	RE	18.2	-0.30%	1.4	1,676	3.6	1,975	9.2	1.0	22.2%	11.9%
PDR	RE	21.0	1.20%	1.8	743	3.9	557	37.8	1.7	6.4%	5.0%
DIG	RE	21.7	-0.20%	1.7	535	3.8	151	143.7	1.7	4.7%	1.1%
HUT	Const	16.3	0.00%	1.1	588	0.7	64	256.9	1.7	1.5%	1.7%
C4G	Const	8.8	0.00%	1.2	-	0.3	503	17.5	0.8	0.0%	4.8%
CSV	Chemicals	37.5	-1.60%	2.0	168	1.6	4,748	7.9	1.1	3.8%	15.2%
DHC	Chemicals	37.2	-0.10%	1.2	121	0.1	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	29.0	-0.30%	0.9	140	0.7	2,509	11.6	1.8	11.7%	16.5%
PC1	Utilities	27.6	0.00%	1.4	346	1.6	1,203	22.9	1.6	13.8%	6.1%
HDG	Utilities	27.4	0.20%	1.3	372	1.9	1,958	14.0	1.5	15.7%	11.8%
GEX	Utilities	20.9	-1.40%	1.5	726	6.5	1,245	16.8	1.3	8.3%	7.0%
QTP	Utilities	14.1	1.40%	0.6	-	0.1	1,357	10.4	1.2	1.2%	11.2%
PLX	O&G	45.0	-0.30%	0.8	2,308	1.4	2,879	15.6	2.2	18.2%	13.8%
BSR	O&G	24.3	1.20%	1.0	-	3.1	2,408	10.1	1.3	0.7%	13.4%
PLC	O&G	24.2	-0.40%	1.5	79	0.1	734	33.0	1.6	0.5%	4.7%
ANV	Fishery	33.2	0.30%	1.6	178	1.0	114	291.6	1.6	1.0%	1.2%
PTB	Material	60.8	2.90%	0.9	164	0.4	4,899	12.4	1.4	24.9%	11.9%
VSC	Logistics	17.1	0.00%	1.3	198	0.6	713	24.0	1.1	3.1%	7.3%
HAH	Logistics	40.4	0.90%	1.3	198	2.0	2,800	14.4	1.8	7.7%	10.6%
VTP	Logistics	76.4	0.40%	1.6	376	1.6	2,893	26.4	5.8	6.9%	22.8%
DBC	Retail	29.1	0.90%	1.5	394	4.1	979	29.7	1.4	12.1%	5.0%
FRT	Retail	176.9	-0.10%	0.8	974	2.4	(414)	-426.9	14.5	36.1%	11.8%
QNS	Retail	48.6	0.60%	0.6	-	0.4	6,678	7.3	2.0	13.8%	28.7%
TNG	Textile	24.7	0.00%	1.3	122	2.2	2,254	11.0	1.6	19.5%	14.7%
PVT	Logistics	28.2	1.80%	1.1	406	2.5	2,805	10.1	1.4	13.2%	14.2%
DPM	Fertilizer	35.0	-0.30%	1.3	554	2.9	1,703	20.6	1.2	8.8%	5.5%
REE	Utilities	65.8	-0.80%	1.1	1,252	1.4	3,804	17.3	1.7	49.0%	10.0%

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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