

STOCK MARKET

The VN-Index continued to decline today, losing over 7 points and closing at 1,495.21. Market breadth was relatively balanced, with 9 out of 18 sectors advancing. The Media sector led the gains with an increase of over 4%, followed by the Personal & Household Goods sector. On the other hand, the Industrial Goods & Services sector posted the sharpest decline. Regarding foreign investor activity, there was continued strong net selling of over VND 2 trillion on the HSX exchange. The tug-of-war around the 1,500 level shows no signs of ending.

FUTURES CONTRACTS

The futures contracts moved in the opposite direction of the VN30 Index, except for VN30F2512.

COVERED WARRANTS

During the trading session on 01/08/2025, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **-7.31** points, closing at **1495.21** points. HNX-Index **-1.41** points, closing at **264.93** points.
- Pulling the index up: **FPT (+1.07)**, **PNJ (+0.50)**, **HDB (+0.46)**, **TAL (+0.45)**, **PGV (+0.38)**.
- Pulling the index down: **CTG (-1.95)**, **VIC (-1.34)**, **BID (-1.05)**, **GEX (-0.75)**, **VNM (-0.58)**.
- The matched trade value of VN-Index reached VND **36,589** billion, decreased **-12.61%** compared to the previous session. The total transaction value reached VND 39,224 billion.
- The trading range is 29.24 points. The market had **141** gainers, 54 remaining unchanged, **180** losers.
- Foreign investors' net selling value: VND **-2304.83** billion on HOSE, including **SSI (VND -466.96 billion)**, **CTG (VND -386.16 billion)**, **FPT (VND -287.62 billion)**, **HPG (VND -282.00 billion)**, **VHM (VND -153.86 billion)**. Foreign investors were net sellers on HNX with the value of VND **-162.04** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.25%**. Positive stocks: **VCI (+3.25%)**, **FPT (+2.88%)**, **HDB (+2.08%)**.
- BSC50 **-0.60%**. Positive stocks: **PNJ (+6.99%)**, **PC1 (+6.95%)**, **HAH (+6.93%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.25%	-0.60%	-0.49%	-0.07%
1 week	-2.23%	0.90%	-2.35%	-3.31%
1 months	5.24%	12.35%	7.99%	8.86%
3 months	22.95%	29.83%	21.93%	23.24%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,495.21	264.93	106.46
% 1D	-0.49%	-0.53%	0.63%
TV (VND bn)	36,589	3,803	1,045
%1D	-12.61%	-8.47%	-33.71%
Foreign (VND bn)	-2304.83	-162.04	-21.59

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
SHB	152.09	SSI	-466.96
NVL	85.44	CTG	-386.16
MSB	83.87	FPT	-287.62
HDB	77.83	HPG	-282.00
HAH	70.17	VHM	-153.86

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	6,339	-0.37%	-0.38%
FTSE100	9,074	-0.65%	-0.51%
Eurostoxx	5,234	-1.69%	-2.30%
Shanghai	3,560	-0.37%	-0.94%
Nikkei	40,837	-0.57%	-1.49%

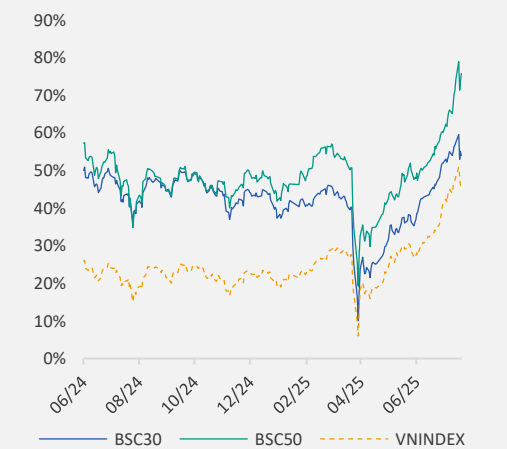
Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	71.40	-0.53%
Gold	3,291	-1.57%
Exchange rate		
USD/VND	26,390	0.04%
EUR/VND	30,698	-0.18%
JPY/VND	178	-1.11%

Interest rates		
10Y-Gov bond rate	3.46%	0.01%
1M-interbank rate	4.66%	

Source: FiinPro-X, BSC compiled

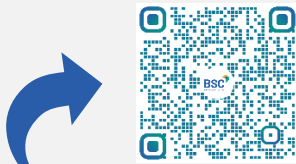
Performances of BSC30, BSC50



Source: BSC

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
FPT	107.00	2.88%	1.07	1.48
PNJ	90.30	6.99%	0.50	0.34
HDB	27.00	2.08%	0.46	3.51
TAL	30.60	20.00%	0.45	0.31
PGV	20.65	6.99%	0.38	1.12

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
NVB	16.80	9.80%	1.29	1.17
KSF	69.20	8.13%	1.13	0.30
PVI	62.80	0.96%	0.09	0.23
VC3	28.10	3.31%	0.08	0.13
CSC	24.90	9.69%	0.07	0.04

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
PGV	20.65	6.99%	0.38	0.23
PNJ	90.30	6.99%	0.49	1.80
EVG	7.98	6.97%	0.03	1.85
GEG	17.65	6.97%	0.10	5.63
PAC	32.30	6.95%	0.04	0.96

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
ECI	14.50	9.85%	0.01	0.65
NVB	16.80	9.80%	7.18	6.65
TKU	14.70	9.70%	0.25	0.00
CSC	24.90	9.69%	0.37	0.39
TV3	15.10	9.42%	0.05	0.14

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
CTG	44.30	-3.49%	-1.95	5.37
VIC	104.00	-1.42%	-1.34	3.88
BID	37.20	-1.72%	-1.05	7.02
GEX	55.90	-6.37%	-0.75	0.90
VNM	60.00	-1.96%	-0.58	2.09

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
SHS	21.50	-6.52%	-0.84	0.89
MBS	35.20	-3.30%	-0.45	0.57
DTK	12.80	-5.19%	-0.30	0.68
CEO	23.30	-3.32%	-0.28	0.54
IDC	44.60	-1.98%	-0.20	0.33

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
PNC	26.60	-6.99%	0.00	0.00
DLG	3.46	-6.99%	-0.02	11.03
FUCVREIT	7.61	-6.97%	0.00	0.01
CLW	48.95	-6.94%	-0.01	0.00
SFC	20.40	-6.85%	0.00	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
NHC	22.50	-8.91%	-0.02	0.00
SSM	5.30	-8.62%	-0.01	0.00
SJ1	11.00	-8.33%	-0.15	0.01
VE1	4.40	-8.33%	-0.01	0.03
SDA	3.40	-8.11%	-0.03	0.08

Figure 1  
Sectors performance

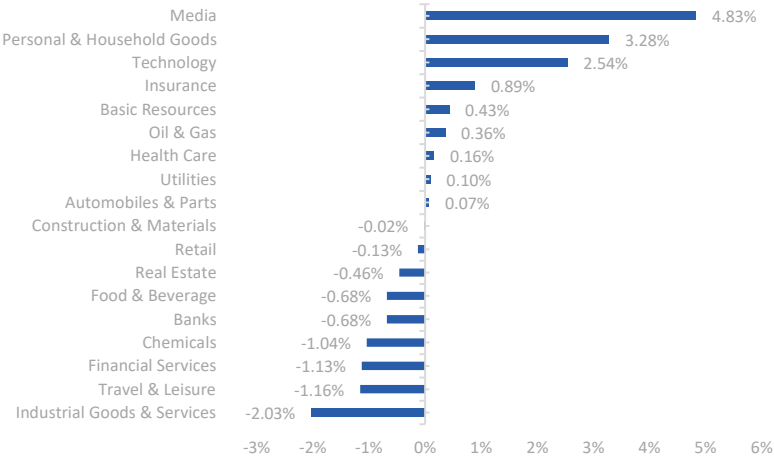
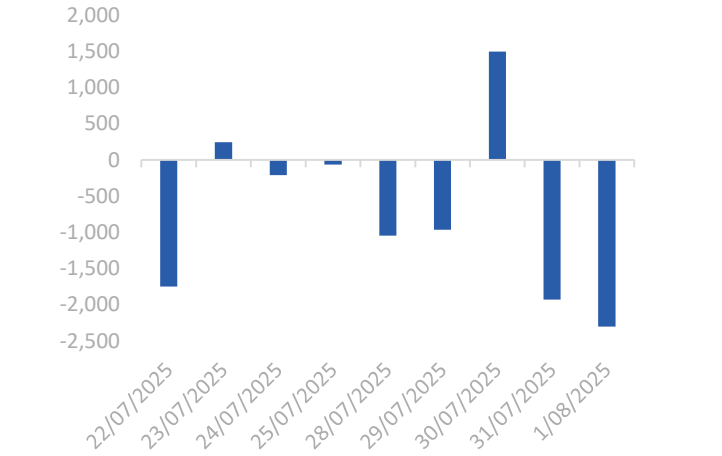


Figure 2  
Foreign transactions



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	65.2	-0.2%	1.5	96,543	687.5	3,304	19.8		48.7%	
KBC	Real Estate	31.5	-0.5%	1.4	29,807	241.3	1,831	17.3		15.4%	
KDH	Real Estate	27.7	1.1%	1.1	30,749	91.3	717	38.2		33.6%	
PDR	Real Estate	20.2	-2.4%	1.5	18,780	345.1	191	108.3	23,600	9.8%	<a href="#">Link</a>
VHM	Real Estate	89.9	-0.1%	1.2	369,667	750.6	6,995	12.9	81,300	10.5%	<a href="#">Link</a>
FPT	Technology	107.0	2.9%	1.0	177,165	1249.0	5,092	20.4	136,500	40.2%	<a href="#">Link</a>
BSR	Oil & Gas	20.7	1.5%	0.0	63,250	392.4	(16)	(1,274)		0.4%	
PVS	Oil & Gas	34.5	0.6%	1.3	16,394	271.9	2,649	13.0	38,600	12.5%	<a href="#">Link</a>
HCM	Financial Services	26.0	0.4%	1.5	27,971	431.6	1,164	22.3		38.4%	
SSI	Financial Services	33.2	-2.9%	1.4	67,438	1921.8	1,577	21.7		41.9%	
VCI	Financial Services	44.5	3.3%	1.3	31,108	1244.4	1,370	31.4		29.4%	
DCM	Chemicals	35.8	-0.3%	1.3	18,979	194.2	3,221	11.1	37,800	5.1%	<a href="#">Link</a>
DGC	Chemicals	101.6	-1.3%	1.4	39,079	205.3	8,205	12.5	109,300	14.9%	<a href="#">Link</a>
ACB	Banks	23.0	0.0%	0.9	118,143	274.9	3,305	7.0	30,400	30.0%	<a href="#">Link</a>
BID	Banks	37.2	-1.7%	1.0	265,759	267.2	3,683	10.3	47,000	17.4%	<a href="#">Link</a>
CTG	Banks	44.3	-3.5%	1.0	246,483	733.4	5,608	8.2	50,000	27.2%	<a href="#">Link</a>
HDB	Banks	27.0	2.1%	1.0	92,444	627.1	4,094	6.5	26,400	17.4%	<a href="#">Link</a>
MBB	Banks	27.2	-1.1%	1.0	167,507	598.7	4,021	6.8	28,200	23.2%	<a href="#">Link</a>
MSB	Banks	13.5	-2.2%	1.1	35,880	395.3	1,961	7.0	14,000	28.3%	<a href="#">Link</a>
STB	Banks	49.4	-1.1%	0.9	94,167	737.0	6,148	8.1		20.0%	
TCB	Banks	34.1	0.3%	1.1	240,205	794.5	3,019	11.3	39,800	22.5%	<a href="#">Link</a>
TPB	Banks	15.7	0.0%	1.2	41,479	337.4	2,423	6.5	-	24.5%	<a href="#">Link</a>
VCB	Banks	60.2	0.0%	0.7	503,012	297.0	4,148	14.5	69,200	22.0%	<a href="#">Link</a>
VIB	Banks	19.0	-2.1%	0.9	66,038	597.3	2,219	8.7	23,000	5.0%	<a href="#">Link</a>
VPB	Banks	25.8	0.0%	1.0	204,695	1439.6	2,193	11.8	26,500	25.6%	<a href="#">Link</a>
HPG	Basic Resources	25.2	0.8%	1.1	191,503	1283.6	1,750	14.3	35,800	21.9%	<a href="#">Link</a>
HSG	Basic Resources	18.5	-0.8%	1.3	11,581	143.9	751	24.8	16,800	9.8%	<a href="#">Link</a>
DBC	Food & Beverage	34.2	1.8%	1.5	11,245	296.7	4,752	7.1	32,200	6.2%	<a href="#">Link</a>
MSN	Food & Beverage	72.5	0.0%	1.2	104,280	471.8	1,862	38.9	82,500	25.4%	<a href="#">Link</a>
VNM	Food & Beverage	60.0	-2.0%	0.5	127,905	322.4	4,101	14.9	64,500	49.1%	<a href="#">Link</a>

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	43.4	2.00%	1.5	9,326	71.1	2,216	19.2	26.33%	16.2%	<a href="#">Link</a>
FRT	Retail	154.5	-0.13%	1.1	26,346	133.0	3,163	48.9	33.34%	24.9%	<a href="#">Link</a>
BVH	Insurance	50.0	1.52%	1.1	36,559	42.3	2,975	16.6	27.21%	10.6%	
DIG	Real Estate	20.9	-4.14%	1.4	14,060	571.9	183	118.6	5.03%	1.5%	
DXG	Real Estate	19.7	-0.51%	1.5	20,174	307.9	353	56.1	25.70%	2.8%	<a href="#">Link</a>
HDC	Real Estate	35.8	2.29%	1.2	6,234	298.0	482	72.6	5.19%	3.8%	
HDG	Real Estate	26.1	-0.19%	1.4	9,675	129.8	522	50.1	17.51%	3.1%	<a href="#">Link</a>
IDC	Real Estate	44.6	-1.98%	1.3	15,015	93.0	4,574	10.0	18.84%	27.3%	
NLG	Real Estate	40.2	-3.13%	1.4	15,981	145.1	1,709	24.3	48.51%	6.9%	<a href="#">Link</a>
SIP	Real Estate	64.8	-3.71%	1.2	16,294	47.1	5,315	12.7	4.04%	28.6%	
SZC	Real Estate	36.6	-2.66%	1.2	6,767	59.5	1,978	19.0	2.50%	11.4%	<a href="#">Link</a>
TCH	Real Estate	23.0	-3.97%	1.5	16,004	188.7	1,125	21.3	12.11%	8.0%	<a href="#">Link</a>
VIC	Real Estate	104.0	-1.42%	1.4	403,396	419.6	3,580	29.5	6.86%	9.9%	
VRE	Real Estate	28.5	1.25%	1.1	63,852	88.0	1,937	14.5	18.39%	10.4%	<a href="#">Link</a>
CMG	Technology	40.0	-1.48%	1.1	8,579	38.6	1,701	23.9	36.64%	12.5%	<a href="#">Link</a>
PLX	Oil & Gas	35.8	-1.24%	0.9	46,059	109.7	1,596	22.7	16.74%	7.9%	<a href="#">Link</a>
PVD	Oil & Gas	21.3	0.71%	1.1	11,757	167.9	1,428	14.8	4.12%	5.0%	<a href="#">Link</a>
FTS	Financial Services	40.9	-0.37%	1.6	14,206	170.3	1,348	30.4	27.41%	10.9%	
MBS	Financial Services	35.2	-3.30%	1.6	20,849	365.8	1,554	23.4	6.30%	12.1%	
GAS	Utilities	67.6	-0.15%	0.9	158,599	60.3	5,152	13.1	1.84%	19.4%	<a href="#">Link</a>
POW	Utilities	14.3	-1.04%	1.0	33,723	193.6	624	23.1	3.36%	4.5%	<a href="#">Link</a>
REE	Utilities	65.5	-1.95%	1.0	36,183	117.1	4,418	15.1	49.00%	12.6%	<a href="#">Link</a>
VJC	Travel & Leisure	119.0	-1.82%	0.6	71,703	1058.1	3,427	35.4	7.87%	9.9%	
GEX	Industrial Goods & Services	55.9	-6.37%	1.4	53,873	1022.4	1,745	34.2	7.94%	11.1%	<a href="#">Link</a>
GMD	Industrial Goods & Services	56.0	-0.36%	0.9	23,615	287.8	3,765	14.9	39.25%	12.0%	<a href="#">Link</a>
HAH	Industrial Goods & Services	80.2	6.93%	1.1	9,742	703.6	7,186	10.4	5.67%	30.7%	<a href="#">Link</a>
PVT	Industrial Goods & Services	18.3	1.39%	1.2	8,482	138.8	2,304	7.8	8.99%	13.9%	<a href="#">Link</a>
VTP	Industrial Goods & Services	109.0	-1.80%	0.0	13,518	250.2	3,235	34.3	5.40%	25.4%	
PNJ	Personal & Household Goods	90.3	6.99%	1.0	28,519	157.3	6,129	13.8	48.97%	18.2%	<a href="#">Link</a>
TCM	Personal & Household Goods	32.5	-0.92%	0.8	3,669	68.8	2,693	12.2	49.96%	13.3%	
TNG	Personal & Household Goods	20.8	-2.35%	1.3	2,611	22.3	2,844	7.5	16.95%	18.6%	<a href="#">Link</a>
DPM	Chemicals	41.5	1.10%	1.2	16,045	184.7	1,663	24.7	8.34%	5.8%	<a href="#">Link</a>
GVR	Chemicals	29.7	-1.33%	1.6	120,400	109.9	1,320	22.8	0.69%	9.8%	
EIB	Banks	26.2	-2.96%	1.1	50,293	334.4	1,783	15.1	5.27%	13.1%	<a href="#">Link</a>
LPB	Banks	34.5	0.88%	0.5	102,165	108.3	3,324	10.3	0.90%	23.3%	<a href="#">Link</a>
NAB	Banks	15.1	-0.33%	0.0	25,907	23.2	2,260	6.7	2.01%	19.6%	
OCB	Banks	12.7	-3.42%	1.0	32,425	142.7	1,220	10.8	19.86%	9.4%	<a href="#">Link</a>
NKG	Basic Resources	15.5	-4.02%	1.3	7,228	322.0	1,122	14.4	6.94%	3.6%	<a href="#">Link</a>
ANV	Food & Beverage	22.9	-2.35%	1.5	6,244	61.2	1,871	12.5	2.50%	16.8%	
BAF	Food & Beverage	34.3	-0.72%	0.7	10,489	105.1	1,921	18.0	3.91%	15.0%	
SAB	Food & Beverage	48.0	0.63%	1.2	61,114	54.7	3,185	15.0	58.94%	17.5%	
VHC	Food & Beverage	55.7	-1.59%	1.3	12,704	49.3	5,567	10.2	19.62%		<a href="#">Link</a>
BMP	Construction & Materials	140.7	0.00%	1.1	11,518	8.0	13,894	10.1	85.80%	39.8%	<a href="#">Link</a>
CTD	Construction & Materials	82.0	1.23%	1.5	8,216	77.2	3,234	25.1	47.79%	5.1%	<a href="#">Link</a>
CTR	Construction & Materials	90.0	-0.33%	1.3	10,329	107.4	4,928	18.3	8.75%	29.9%	<a href="#">Link</a>
DPG	Construction & Materials	44.2	1.49%	1.3	4,390	124.0	2,501	17.4	4.39%	12.8%	
HHV	Construction & Materials	12.8	0.00%	1.4	6,367	171.9	1,077	11.9	10.08%	5.2%	<a href="#">Link</a>
PC1	Construction & Materials	27.7	6.95%	1.2	9,263	534.2	1,179	22.0	14.77%	7.6%	<a href="#">Link</a>
VCG	Construction & Materials	26.4	1.93%	1.4	16,744	599.2	1,241	20.9	9.84%	9.9%	
VGC	Construction & Materials	56.3	-5.22%	1.4	26,632	181.6	3,343	17.8	5.54%	17.5%	

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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