Vietnam Daily Review

VN-INDEX EXPERIENCED SHARP FLUCTUATIONS

Tuesday, 5 August 2025

STOCK MARKET

The market experienced a highly volatile session today, forming a doji candlestick with long upper and lower shadows. By the end of the session, the VN-Index closed at 1,547.15 points, gaining nearly 19 points compared to the previous day. Eight out of eighteen sectors advanced. However, the number of declining stocks still outnumbered gainers, indicating that capital flows were concentrated in a select few stocks within specific sectors. Regarding foreign trading activity, foreign investors recorded a net sell of over VND 2.5 trillion on the HSX. Strong profit-taking pressure near the 1,585 resistance level caused the index to fall sharply upon approach. However, bottom-fishing demand around the 1,520 area remained relatively solid. In the coming sessions, the VN-Index may attempt to establish a balance within the 1,520–1,585 range by gradually narrowing its trading band.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 05/08/2025, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

• VN-Index +18.96 points, closing at 1547.15 points. HNX-Index -2.22 points, closing at 266.12 points.

• Pulling the index up: VIC (+5.96), VHM (+3.74), MBB (+2.85), TCB (+2.81), HPG (+2.03).

• Pulling the index down: BCM (-0.49), SSB (-0.41), VPL (-0.41), PGV (-0.35), VIX (-0.31).

• The matched trade value of VN-Index reached VND 72,893 billion, increased 135.65% compared to the previous session. The total transaction value reached VND 78,253 billion.

• The trading range is 65.9 points. The market had 221 gainers, 118 remaining unchanged, 40 losers.

• Foreign investors' net selling value: VND -2339.26 billion on HOSE, including VIC (VND -2668.43 billion), SHB (VND -231.82 billion), VPB (VND -199.70 billion), VHM (VND -152.03 billion), FPT (VND -145.98 billion). Foreign investors were net buyers on HNX with the value of VND 271.41 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 +1.31%. Positive stocks: MBB (+6.83%), TPB (+5.07%), TCB (+4.67%).

• BSC50 -0.39%. Positive stocks: VRE (+6.36%), VIC (+5.67%), GEX (+4.42%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	1.31%	-0.39%	1.24%	2.25%
1 week	1.93%	3.34%	3.60%	4.26%
1 months	6.15%	13.06%	11.55%	13.55%
3 months	21.63%	26.87%	23.74%	27.60%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,547.15	266.12	107.50
% 1D	1.24%	-0.83%	0.32%
TV (VND bn)	72,893	5,674	1,834
%1D	135.65%	76.88%	55.67%
Foreign (VND bn)	-2339.26	271.41	-16.11

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
HPG	1,083.71	VIC	-2668.43
MSN	140.61	SHB	-231.82
BID	140.23	VPB	-199.70
MWG	137.91	VHM	-152.03
VCB	128.13	FPT	-145.98

Source: FiinPro-X, BSC compiled

Overview of global stock markets

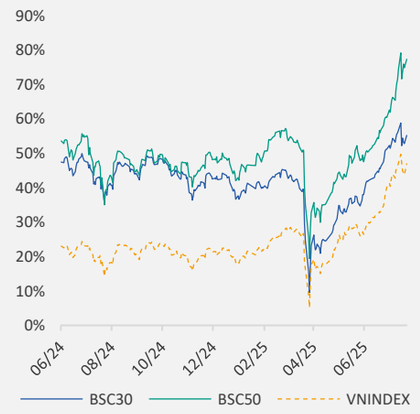
		%D	%W
SPX	6,330	1.47%	-0.94%
FTSE100	9,163	0.38%	0.29%
Eurostoxx	5,251	0.28%	-2.39%
Shanghai	3,618	0.96%	0.22%
Nikkei	40,587	0.74%	-0.22%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	65.74	-4.39%
Gold	3,365	-1.93%
Exchange rate		
USD/VND	26,370	0.00%
EUR/VND	31,083	0.09%
JPY/VND	182	0.55%
Interst rates		
10Y-Gov bond rate	3.46%	0.00%
1M-interbank rate	4.51%	

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)
VIC	117.50	5.67%	5.96	3.88
VHM	96.00	4.12%	3.74	4.11
MBB	29.70	6.83%	2.85	6.10
TCB	37.00	4.67%	2.81	7.06
HPG	26.40	4.35%	2.03	7.68

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
BCM	68.90	-2.96%	-0.49	1.04
SSB	19.60	-3.21%	-0.41	2.85
VPL	84.00	-1.18%	-0.41	1.79
PGV	20.25	-6.68%	-0.35	1.12
VIX	26.80	-3.25%	-0.31	1.53

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSF	67.70	1.65%	0.23	0.30
PVI	63.20	1.61%	0.16	0.23
CEO	23.80	0.85%	0.07	0.54
IDC	44.90	0.67%	0.07	0.33
NFC	62.10	8.95%	0.06	0.02

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
NVB	16.90	-5.59%	-0.75	1.17
KSV	165.50	-1.19%	-0.27	0.20
SHS	23.20	-1.69%	-0.24	0.89
THD	28.00	-3.11%	-0.23	0.38
PVS	33.50	-1.76%	-0.19	0.48

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
VSI	23.00	6.98%	0.00	0.09
EVG	9.12	6.92%	0.03	16.10
MBB	29.70	6.83%	2.82	75.43
HAG	14.90	6.81%	0.24	48.71
HSL	10.00	6.72%	0.01	1.50

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
PC1	25.60	-6.91%	-0.14	17.38
PET	33.80	-6.89%	-0.06	4.36
NHH	12.30	-6.82%	-0.02	0.84
MHC	11.65	-6.80%	-0.01	1.22
PGV	20.25	-6.68%	-0.35	0.15

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
MAS	36.60	9.91%	0.06	0.00
CAN	37.60	9.62%	0.07	0.00
BST	9.20	9.52%	0.00	0.00
ECI	17.40	9.43%	0.01	0.00
NFC	62.10	8.95%	0.33	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
VMS	24.00	-9.77%	-0.08	0.00
NST	13.10	-9.66%	-0.05	0.00
SMT	9.90	-9.17%	-0.02	0.03
VNT	30.30	-8.18%	-0.16	0.00
HAD	14.60	-7.59%	-0.02	0.00

Figure 1
Sectors performance

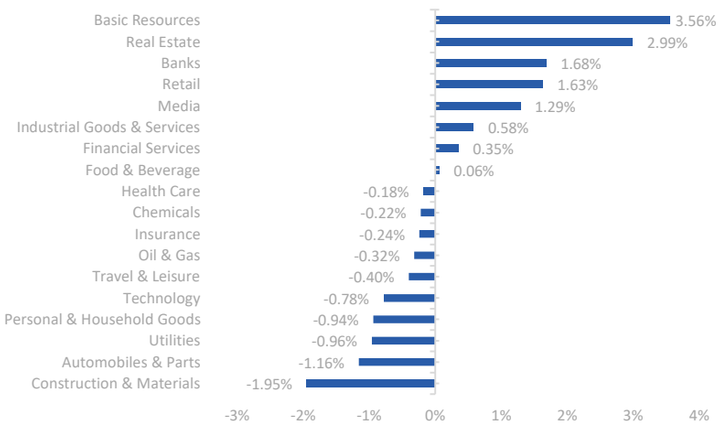
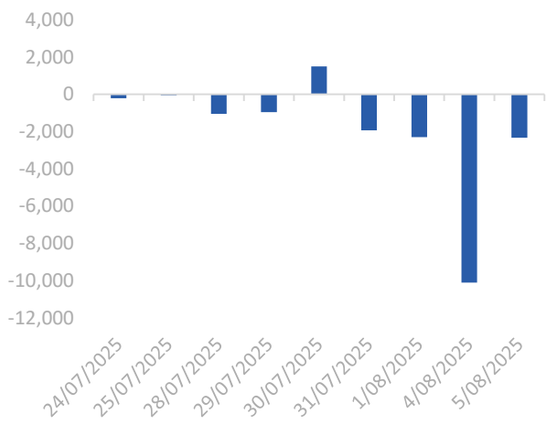


Figure 2
Foreign transactions



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	69.3	3.4%	1.4	102,457	1212.3	3,304	21.0		48.6%	
KBC	Real Estate	32.5	2.9%	1.5	30,560	784.7	1,831	17.7		14.7%	
KDH	Real Estate	27.9	0.0%	1.3	31,310	268.5	717	38.9		33.4%	
PDR	Real Estate	19.0	-1.0%	1.7	18,616	590.2	177	107.6	23,600	9.8%	Link
VHM	Real Estate	96.0	4.1%	0.9	394,312	996.2	6,995	13.7	81,300	10.5%	Link
FPT	Technology	105.8	-0.8%	0.9	180,231	1313.1	5,092	20.8	136,500	40.0%	Link
BSR	Oil & Gas	20.4	-0.5%	0.0	63,250	575.8	(16)	(1,274)		0.4%	
PVS	Oil & Gas	33.5	-1.8%	1.4	16,012	371.8	2,649	12.7	38,600	12.4%	Link
HCM	Financial Services	26.6	0.6%	1.4	28,673	1000.2	1,156	23.0		38.3%	
SSI	Financial Services	34.7	1.9%	1.4	68,325	3195.8	1,577	22.0		41.5%	
VCI	Financial Services	45.8	2.6%	1.4	33,095	1553.4	1,370	33.4		29.2%	
DCM	Chemicals	36.0	-1.0%	1.4	19,058	368.5	3,221	11.2	37,800	5.1%	Link
DGC	Chemicals	103.5	0.3%	1.3	39,307	617.1	8,205	12.6	109,300	14.9%	Link
ACB	Banks	23.5	0.6%	0.8	120,455	1087.3	3,305	7.1	30,400	30.0%	Link
BID	Banks	38.8	1.8%	0.8	272,078	1120.8	3,683	10.5	47,000	17.4%	Link
CTG	Banks	46.5	1.9%	1.2	249,705	1144.8	5,608	8.3	50,000	27.1%	Link
HDB	Banks	27.9	-0.4%	1.1	97,512	1029.5	4,094	6.8	26,400	17.5%	Link
MBB	Banks	29.7	6.8%	1.0	181,237	2200.4	4,021	7.4	28,200	23.2%	Link
MSB	Banks	14.2	0.7%	1.0	36,920	643.9	1,961	7.2	14,000	28.5%	Link
STB	Banks	51.7	3.4%	1.0	97,466	1930.5	6,148	8.4		19.9%	
TCB	Banks	37.0	4.7%	1.1	261,400	3637.2	3,019	12.3	39,800	22.5%	Link
TPB	Banks	17.6	5.1%	1.1	46,498	1790.6	2,423	7.3	-	24.4%	Link
VCB	Banks	61.5	0.7%	0.8	513,874	1177.5	4,148	14.8	69,200	22.0%	Link
VIB	Banks	19.3	-0.3%	0.9	65,697	640.7	2,219	8.7	23,000	5.0%	Link
VPB	Banks	26.5	0.4%	1.0	210,249	2167.9	2,193	12.1	26,500	25.5%	Link
HPG	Basic Resources	26.4	4.4%	1.3	202,632	5736.7	1,750	15.1	35,800	21.8%	Link
HSG	Basic Resources	18.6	0.3%	1.6	11,550	541.6	751	24.8	16,800	9.7%	Link
DBC	Food & Beverage	33.9	-1.9%	1.4	11,329	589.5	4,752	7.1	32,200	6.3%	Link
MSN	Food & Beverage	74.6	1.0%	1.4	107,865	1462.3	1,862	40.1	82,500	25.4%	Link
VNM	Food & Beverage	60.1	-0.5%	0.6	125,606	580.8	4,101	14.7	64,500	49.1%	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	43.7	-2.24%	1.5	9,578	153.1	2,216	19.7	26.19%	16.2%	Link
FRT	Retail	151.0	-2.08%	0.6	25,716	194.8	3,163	47.7	33.34%	24.9%	Link
BVH	Insurance	49.8	-0.40%	1.1	36,968	56.2	3,311	15.0	27.10%	10.6%	
DIG	Real Estate	21.3	-1.16%	1.5	13,737	1050.3	183	115.9	5.10%	1.5%	
DXG	Real Estate	20.1	0.50%	1.6	20,480	985.4	353	56.9	25.81%	2.8%	Link
HDC	Real Estate	35.0	-2.51%	1.4	6,242	464.8	482	72.7	6.11%	3.8%	
HDG	Real Estate	26.4	-0.19%	1.4	9,767	264.1	522	50.5	17.33%	3.1%	Link
IDC	Real Estate	44.9	0.67%	1.5	14,817	218.0	4,574	9.8	18.06%	27.3%	
NLG	Real Estate	41.1	-1.68%	1.5	15,807	235.0	1,709	24.0	49.09%	6.9%	Link
SIP	Real Estate	63.8	-1.24%	1.3	15,447	71.8	5,315	12.0	4.00%	28.6%	
SZC	Real Estate	36.3	-0.55%	1.3	6,533	135.6	1,978	18.4	2.10%	11.4%	Link
TCH	Real Estate	23.6	-1.26%	1.5	15,770	332.1	1,125	21.0	12.25%	8.0%	Link
VIC	Real Estate	117.5	5.67%	1.1	449,280	3822.4	3,580	32.8	6.86%	9.9%	
VRE	Real Estate	31.0	6.36%	1.1	70,328	440.8	1,937	16.0	18.38%	10.4%	Link
CMG	Technology	39.5	-0.50%	1.3	8,346	83.0	1,701	23.2	36.64%	12.5%	Link
PLX	Oil & Gas	36.6	0.00%	1.0	46,504	144.1	1,596	22.9	16.63%	7.9%	Link
PVD	Oil & Gas	21.0	-0.71%	1.3	11,646	267.7	1,428	14.7	4.03%	5.0%	Link
FTS	Financial Services	40.8	-0.97%	1.5	14,120	454.4	1,348	30.2	27.20%	10.9%	
MBS	Financial Services	36.0	0.28%	1.6	20,620	512.3	1,554	23.2	6.21%	12.1%	
GAS	Utilities	67.8	-0.29%	1.0	158,833	138.4	5,152	13.2	1.84%	19.4%	Link
POW	Utilities	14.5	-1.69%	1.2	33,957	406.7	624	23.2	3.28%	4.5%	Link
REE	Utilities	66.5	-0.45%	0.9	36,020	79.4	4,418	15.1	49.00%	12.6%	Link
VJC	Travel & Leisure	127.3	0.00%	0.7	75,312	560.2	3,427	37.1	7.87%	9.9%	
GEX	Industrial Goods & Services	59.1	4.42%	1.8	53,332	1872.5	1,745	33.9	8.11%	11.1%	Link
GMD	Industrial Goods & Services	58.4	2.46%	1.1	24,539	499.9	3,765	15.5	39.18%	12.0%	Link
HAH	Industrial Goods & Services	76.2	-4.99%	1.2	9,898	718.3	7,186	10.6	6.37%	30.7%	Link
PVT	Industrial Goods & Services	18.0	-0.55%	1.1	8,459	146.4	2,304	7.8	8.72%	13.9%	Link
VTP	Industrial Goods & Services	115.0	1.32%	0.0	14,005	156.0	3,339	34.4	5.25%	25.4%	
PNJ	Personal & Household Goods	85.5	-1.16%	1.1	28,891	212.9	6,129	14.0	48.97%	18.2%	Link
TCM	Personal & Household Goods	32.5	0.00%	1.0	3,636	106.4	2,693	12.1	49.95%	13.3%	
TNG	Personal & Household Goods	20.5	-0.49%	1.5	2,513	53.1	2,844	7.2	16.95%	18.6%	Link
DPM	Chemicals	41.3	-1.43%	1.3	16,162	329.4	1,663	24.8	8.41%	5.8%	Link
GVR	Chemicals	30.0	0.17%	1.5	119,800	201.0	1,320	22.7	0.68%	9.8%	
EIB	Banks	26.9	-0.74%	1.0	50,014	791.5	1,783	15.1	5.30%	13.1%	Link
LPB	Banks	35.3	1.73%	0.4	105,451	357.9	3,324	10.6	0.89%	23.3%	Link
NAB	Banks	15.3	0.99%	0.0	26,164	51.6	2,260	6.8	1.97%	19.6%	
OCB	Banks	13.2	-1.12%	0.9	32,548	265.7	1,220	10.8	19.84%	9.4%	Link
NKG	Basic Resources	16.1	1.90%	1.5	7,184	680.7	666	24.1	6.51%	3.6%	Link
ANV	Food & Beverage	24.3	-0.82%	1.5	6,470	196.8	1,871	13.0	2.69%	16.8%	
BAF	Food & Beverage	35.0	3.86%	0.5	10,641	563.1	1,921	18.2	3.72%	15.0%	
SAB	Food & Beverage	47.5	-1.25%	0.7	60,922	105.6	3,185	14.9	58.96%	17.5%	
VHC	Food & Beverage	58.0	-0.34%	1.2	13,018	175.4	6,372	9.1	19.59%		Link
BMP	Construction & Materials	140.7	-0.28%	0.6	11,518	23.3	13,894	10.1	85.77%	39.8%	Link
CTD	Construction & Materials	80.1	-1.35%	1.4	8,125	150.2	4,512	17.8	47.83%	5.1%	Link
CTR	Construction & Materials	90.9	-1.52%	1.3	10,398	67.4	4,928	18.5	8.07%	29.9%	Link
DPG	Construction & Materials	45.0	-1.32%	1.5	4,536	184.3	2,501	18.0	4.33%	12.8%	
HHV	Construction & Materials	13.2	1.15%	1.3	6,541	425.1	1,077	12.2	9.68%	5.2%	Link
PC1	Construction & Materials	25.6	-6.91%	1.1	9,156	464.7	1,179	21.7	15.25%	7.6%	Link
VCG	Construction & Materials	25.6	-3.76%	1.2	16,550	692.5	1,241	20.6	9.84%	9.9%	
VGC	Construction & Materials	54.7	-5.03%	1.3	24,525	209.6	3,343	16.4	5.75%	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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