Vietnam Daily Review

STRONG BOTTOM-FISHING DEMAND AROUND THE 1,565 LEVEL

Friday, 8 August 2025

STOCK MARKET

The VN-Index continued to struggle today and closed at 1,584.95 points, up slightly by more than 3 points compared to yesterday. Market breadth was relatively balanced with 10 out of 18 sectors gaining, led by the Oil & Gas sector, followed by the Industrial Goods & Services sector. In terms of foreign trading, net selling was recorded on the HSX and UPCOM, while net buying occurred on the HNX. Today's candlestick continued to show good bottom-fishing power around 1,565 area. The trend of struggling in the 1,580 - 1,585 range is likely to continue in the short term to build a more solid price base.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

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

HIGHLIGHT

- VN-Index +3.14 points, closing at 1584.95 points. HNX-Index +1.60 points, closing at 272.46 points.
- Pulling the index up: VIC (+1.84), VPB (+1.13), GEE (+0.74), GEX (+0.62), GAS (+0.61).
- Pulling the index down: BID (-1.20), TCB (-0.89), HPG (-0.88), VJC (-0.75), GVR (-0.46).
- The matched trade value of VN-Index reached VND 47,965 billion, increased 15.30% compared to the previous session. The total transaction value reached VND 49,233 billion.
- The trading range is 27.07 points. The market had 177 gainers, 51 remaining unchanged, 155 losers.
- Foreign investors' net selling value: VND -842.00 billion on HOSE, including BID (VND -216.05 billion), SSI (VND -204.54 billion), HPG (VND -150.27 billion), FPT (VND -134.25 billion), VCB (VND -105.94 billion). Foreign investors were net buyers on HNX with the value of VND 54.02 billion.

BSC30, BSC50 PERFORMANCE

- BSC30 +0.76%. Positive stocks: PVS (+8.96%), PDR (+6.77%), KDH (+6.02%).
- BSC50 +0.46%. Positive stocks: PVD (+6.98%), DPM (+6.97%), GEX (+4.87%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.76%	0.46%	0.20%	-0.33%
1 week	6.05%	4.52%	6.00%	7.12%
1 months	7.61%	14.08%	10.73%	12.04%
3 months	25.34%	29.45%	25.07%	27.87%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,584.95	272.46	108.54
% 1D	0.20%	0.59%	0.57%
TV (VND bn)	47,965	5,093	1,475
%1D	15.30%	89.21%	18.78%
Foreign (VND bn)	-842.00	54.02	-28.34

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VPB	223.88	BID	-216.05
GEX	132.59	SSI	-204.54
CII	124.43	HPG	-150.27
DCM	123.74	FPT	-134.25
PDR	82.22	VCB	-105.94

Source: FiinPro-X, BSC compiled

Overview of global stock markets

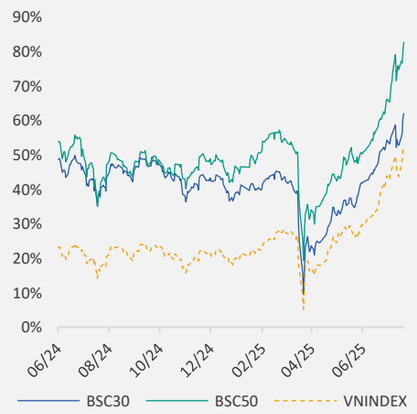
		%D	%W
SPX	6,340	-0.08%	0.01%
FTSE100	9,095	-0.07%	0.29%
Eurostoxx	5,332	0.00%	3.03%
Shanghai	3,635	-0.12%	2.11%
Nikkei	41,820	1.85%	2.56%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	66.65	0.37%
Gold	3,396	-2.80%
Exchange rate		
USD/VND	26,400	0.00%
EUR/VND	31,349	0.01%
JPY/VND	182	0.00%
Interst rates		
10Y-Gov bond rate	3.47%	-0.03%
1M-interbank rate	4.82%	

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)
VIC	117.00	1.74%	1.84	3.88
VPB	29.55	2.07%	1.13	7.93
GEE	124.60	6.95%	0.74	0.37
GEX	60.30	4.87%	0.62	0.90
GAS	70.20	1.59%	0.61	2.34

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
BID	39.70	-1.85%	-1.20	7.02
TCB	37.85	-1.43%	-0.89	7.09
HPG	28.00	-1.75%	-0.88	7.68
VJC	121.50	-4.86%	-0.75	0.54
GVR	30.60	-1.61%	-0.46	4.00

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PVS	37.70	8.96%	1.08	0.48
CEO	25.60	7.56%	0.70	0.54
BAB	14.20	2.16%	0.20	0.96
VCS	51.80	2.98%	0.17	0.16
PVI	63.70	0.79%	0.08	0.23

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
SHS	23.40	-2.90%	-0.41	0.89
NVB	16.80	-2.33%	-0.31	1.17
MBS	36.10	-1.90%	-0.26	0.57
DTK	12.10	-3.97%	-0.22	0.68
KSF	67.00	-1.47%	-0.20	0.30

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
SVI	61.20	6.99%	0.01	0.00
NVT	9.20	6.98%	0.01	0.02
PVD	23.00	6.98%	0.21	31.37
DPM	28.40	6.97%	3.81	3.23
BIC	47.60	6.97%	0.09	0.61

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
MDG	13.45	-6.92%	0.00	0.00
CLW	51.70	-6.85%	-0.01	0.01
FUEIP100	10.42	-5.27%	0.00	0.00
VSI	21.00	-5.19%	0.00	0.03
VJC	121.50	-4.86%	-0.80	2.18

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
PJC	29.80	9.96%	0.08	0.00
BKC	33.60	9.80%	0.30	0.07
PTD	7.90	9.72%	0.01	0.00
PVS	37.70	8.96%	6.19	27.25
TKU	14.70	8.89%	0.23	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
PIA	29.60	-9.76%	-0.04	0.00
VE3	8.00	-9.09%	0.00	0.00
QST	26.10	-9.06%	-0.03	0.00
ECI	17.40	-8.90%	-0.01	0.00
KST	12.50	-7.41%	-0.02	0.00

Figure 1
Sectors performance

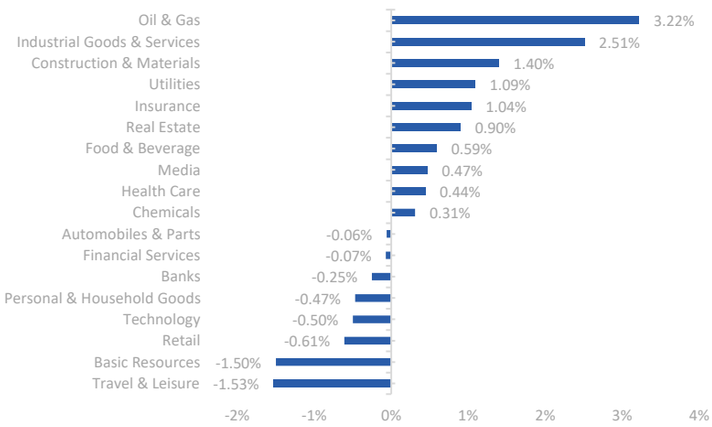
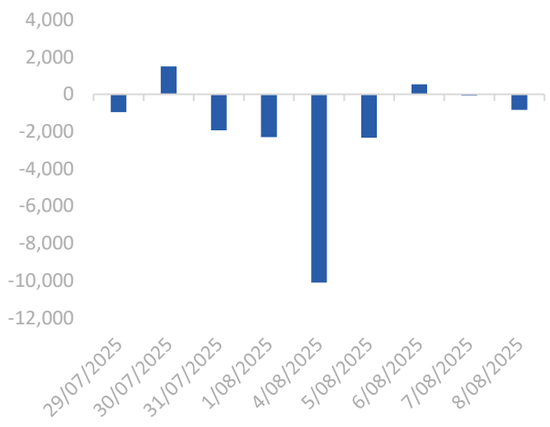


Figure 2
Foreign transactions



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	72.0	-0.6%	1.5	107,040	874.4	3,304	21.9	84,700	48.9%	Link
KBC	Real Estate	33.3	-2.1%	1.4	31,973	252.7	1,831	18.6		14.9%	
KDH	Real Estate	31.7	6.0%	1.2	33,554	335.7	717	41.7		33.0%	
PDR	Real Estate	21.3	6.8%	1.5	19,547	970.1	177	113.0	23,600	9.4%	Link
VHM	Real Estate	94.8	-0.2%	1.2	390,204	329.5	6,995	13.6	81,300	10.4%	Link
FPT	Technology	105.6	-0.6%	1.0	180,912	1055.4	5,092	20.9	136,500	39.6%	Link
BSR	Oil & Gas	22.5	2.7%	0.0	67,901	551.4	(16)	(1,368)		0.3%	
PVS	Oil & Gas	37.7	9.0%	1.3	16,538	990.4	2,649	13.1	38,600	11.8%	Link
HCM	Financial Services	27.9	-1.1%	1.5	30,455	621.5	1,153	24.5		38.6%	
SSI	Financial Services	35.5	1.0%	1.4	69,311	3434.9	1,577	22.3		40.5%	
VCI	Financial Services	45.5	-2.2%	1.2	33,601	847.4	1,370	34.0		28.8%	
DCM	Chemicals	41.5	4.0%	1.3	21,123	441.9	3,221	12.4	47,300	5.7%	Link
DGC	Chemicals	107.5	1.1%	1.4	40,370	462.4	8,205	13.0	109,300	14.6%	Link
ACB	Banks	24.3	-0.6%	0.9	125,334	387.2	3,305	7.4	30,400	30.0%	Link
BID	Banks	39.7	-1.9%	1.0	284,014	670.6	3,683	11.0	47,000	17.5%	Link
CTG	Banks	47.7	-0.3%	1.0	256,954	592.4	5,608	8.5	50,000	26.9%	Link
HDB	Banks	28.1	-1.6%	1.0	99,609	721.6	4,094	7.0	26,400	17.5%	Link
MBB	Banks	30.6	-0.7%	1.0	187,645	826.3	4,021	7.7	28,200	23.2%	Link
MSB	Banks	15.4	0.3%	1.1	39,910	429.0	1,961	7.8	14,000	28.6%	Link
STB	Banks	54.0	-1.1%	1.0	102,933	904.8	6,148	8.9		20.2%	
TCB	Banks	37.9	-1.4%	1.2	271,290	1176.3	3,019	12.7	39,800	22.5%	Link
TPB	Banks	19.4	-0.5%	1.3	51,386	853.5	2,423	8.0	-	24.7%	Link
VCB	Banks	61.9	0.3%	0.6	515,545	673.9	4,148	14.9	75,700	22.0%	Link
VIB	Banks	20.3	3.6%	0.9	66,548	524.6	2,219	8.8	23,000	5.0%	Link
VPB	Banks	29.6	2.1%	1.0	229,687	1419.4	2,193	13.2	26,500	25.7%	Link
HPG	Basic Resources	28.0	-1.8%	1.2	218,751	3390.7	1,750	16.3	35,800	22.3%	Link
HSG	Basic Resources	19.5	-0.5%	1.3	12,171	266.6	751	26.1	16,800	9.6%	Link
DBC	Food & Beverage	31.0	2.3%	1.4	11,642	393.4	4,124	7.3	32,200	5.8%	Link
MSN	Food & Beverage	76.7	0.7%	1.2	110,179	899.6	1,862	40.9	82,500	25.4%	Link
VNM	Food & Beverage	60.8	-0.2%	0.5	127,278	409.6	4,101	14.9	64,500	49.0%	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	45.8	-1.40%	1.5	10,180	257.1	2,216	21.0	26.54%	16.2%	Link
FRT	Retail	151.5	-0.33%	1.1	25,886	152.9	3,163	48.1	33.18%	24.9%	Link
BVH	Insurance	52.0	0.00%	1.1	38,601	37.2	3,311	15.7	27.09%	10.6%	
DIG	Real Estate	22.8	3.40%	1.4	14,254	1016.5	183	120.3	4.72%	1.5%	
DXG	Real Estate	21.4	3.88%	1.5	20,989	836.5	353	58.4	25.79%	2.8%	Link
HDC	Real Estate	36.1	0.70%	1.2	6,394	377.7	482	74.4	6.26%	3.8%	
HDG	Real Estate	28.0	0.54%	1.4	10,303	220.4	522	53.3	17.03%	3.1%	Link
IDC	Real Estate	45.9	-0.86%	1.3	15,279	163.6	4,574	10.1	17.91%	27.3%	
NLG	Real Estate	42.4	1.07%	1.4	16,154	158.3	1,709	24.6	49.11%	6.9%	Link
SIP	Real Estate	65.7	-1.05%	1.1	16,076	43.1	5,315	12.5	4.11%	28.6%	
SZC	Real Estate	37.1	-1.20%	1.1	6,749	87.5	1,978	19.0	2.37%	11.4%	Link
TCH	Real Estate	24.8	2.69%	1.5	16,137	356.3	1,125	21.5	12.01%	8.0%	Link
VIC	Real Estate	117.0	1.74%	1.4	439,721	373.9	3,580	32.1	3.91%	9.9%	
VRE	Real Estate	30.0	-1.64%	1.1	69,306	244.9	1,937	15.7	18.49%	10.4%	Link
CMG	Technology	40.9	0.49%	1.1	8,600	84.9	1,701	23.9	36.56%	12.5%	Link
PLX	Oil & Gas	38.2	2.96%	0.9	47,139	241.3	1,596	23.2	16.54%	7.9%	Link
PVD	Oil & Gas	23.0	6.98%	1.1	11,951	704.5	1,428	15.1	3.81%	5.0%	Link
FTS	Financial Services	41.8	-2.34%	1.5	14,830	318.6	1,348	31.8	26.35%	10.9%	
MBS	Financial Services	36.1	-1.90%	1.6	21,078	404.6	1,554	23.7	6.15%	12.1%	
GAS	Utilities	70.2	1.59%	0.9	161,879	154.9	5,152	13.4	1.86%	19.4%	Link
POW	Utilities	15.2	1.68%	1.0	34,894	362.2	624	23.9	3.14%	4.5%	Link
REE	Utilities	68.0	1.64%	1.0	36,237	132.4	4,418	15.1	49.00%	12.6%	Link
VJC	Travel & Leisure	121.5	-4.86%	0.6	75,549	270.0	3,427	37.3	7.89%	9.9%	
GEX	Industrial Goods & Services	60.3	4.87%	1.4	51,888	800.5	1,745	33.0	7.88%	11.1%	Link
GMD	Industrial Goods & Services	59.0	-1.67%	0.9	25,212	233.4	3,765	15.9	39.44%	12.0%	Link
HAH	Industrial Goods & Services	58.2	-0.85%	1.0	9,912	233.9	5,700	10.3	5.87%	30.7%	Link
PVT	Industrial Goods & Services	19.0	4.12%	1.2	8,553	280.4	2,304	7.9	8.76%	13.9%	Link
VTP	Industrial Goods & Services	118.0	1.03%	0.0	14,224	180.8	3,339	35.0	5.10%	25.4%	
PNJ	Personal & Household Goods	85.8	-0.69%	1.0	29,195	101.1	6,129	14.1	48.95%	18.2%	Link
TCM	Personal & Household Goods	33.0	-1.20%	0.8	3,742	75.6	2,693	12.4	49.90%	13.3%	
TNG	Personal & Household Goods	21.5	-0.92%	1.3	2,660	41.5	2,844	7.6	17.02%	18.6%	Link
DPM	Chemicals	28.4	6.97%	1.3	18,052	91.6	957	27.7	8.54%	5.8%	Link
GVR	Chemicals	30.6	-1.61%	1.5	124,400	163.1	1,320	23.6	0.70%	9.8%	
EIB	Banks	26.7	-1.48%	1.1	50,480	502.6	1,783	15.2	5.27%	13.1%	Link
LPB	Banks	35.4	-1.12%	0.5	106,945	120.3	3,324	10.8	0.89%	23.3%	Link
NAB	Banks	15.6	0.97%	0.0	26,422	37.4	2,260	6.8	1.96%	19.6%	
OCB	Banks	13.0	3.24%	1.0	33,535	195.9	1,220	11.2	19.73%	9.4%	Link
NKG	Basic Resources	16.6	-1.48%	1.3	7,542	353.3	666	25.3	5.98%	3.6%	Link
ANV	Food & Beverage	27.4	-1.44%	1.6	7,402	195.6	1,871	14.9	3.14%	16.8%	
BAF	Food & Beverage	35.1	0.57%	0.7	10,595	244.0	1,921	18.2	3.78%	15.0%	
SAB	Food & Beverage	47.9	0.31%	1.1	61,178	48.0	3,185	15.0	58.90%	17.5%	
VHC	Food & Beverage	58.5	-1.85%	1.3	13,377	135.0	6,372	9.4	20.12%		Link
BMP	Construction & Materials	141.8	-0.07%	1.0	11,616	7.0	13,894	10.2	85.68%	39.8%	Link
CTD	Construction & Materials	82.6	-0.48%	1.4	8,419	80.3	4,512	18.4	47.81%	5.1%	Link
CTR	Construction & Materials	94.0	1.40%	1.2	10,604	161.4	4,928	18.8	7.43%	29.9%	Link
DPG	Construction & Materials	45.8	-2.24%	1.3	4,722	160.1	2,501	18.7	3.76%	12.8%	
HHV	Construction & Materials	13.7	-1.08%	1.4	6,889	241.0	1,077	12.9	10.79%	5.2%	Link
PC1	Construction & Materials	26.4	0.96%	1.1	9,352	175.0	1,179	22.2	14.96%	7.6%	Link
VCG	Construction & Materials	26.4	-0.19%	1.3	17,067	270.2	1,241	21.3	9.20%	9.9%	
VGC	Construction & Materials	58.0	3.39%	1.4	25,152	179.5	3,343	16.8	5.85%	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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