STOCK MARKET

The VN-Index continued its upward trend today, gaining more than 11 points to close at 1,608.22. Market breadth was quite balanced, with 14 out of 18 sectors advancing, led by Oil & Gas sector, followed by Construction & Materials sector. In terms of foreign trading, net selling was recorded across all three exchanges: HSX, HNX, and UPCOM. Today's candlestick with a long lower shadow shows that the cash flow is still tilted to support the market's upward momentum, with a solid bottom-fishing effort around the 1,590 level, despite ongoing tug-of-war between buyers and sellers. In the near term, the VN-Index will need accumulation sessions to create a foundation for a more solid upward momentum.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 12/08/2025, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

• VN-Index +11.36 points, closing at 1608.22 points. HNX-Index +0.01 points, closing at 276.47 points.

• Pulling the index up: BID (+2.18), LPB (+1.66), VCB (+0.98), MBB (+0.87), HDB (+0.84).

• Pulling the index down: VHM (-0.47), SSI (-0.34), GEE (-0.33), VIB (-0.27), GEX (-0.25).

• The matched trade value of VN-Index reached VND 43,790 billion, decreased -1.26% compared to the previous session. The total transaction value reached VND 45,460 billion.

• The trading range is 17.16 points. The market had 176 gainers, 53 remaining unchanged, 156 losers.

• Foreign investors' net selling value: VND -691.64 billion on HOSE, including FPT (VND -171.30 billion), VHM (VND -155.48 billion), SSI (VND -124.93 billion), HPG (VND -118.86 billion), MWG (VND -92.72 billion). Foreign investors were net sellers on HNX with the value of VND -17.73 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 +0.97%. Positive stocks: KDH (+6.88%), PDR (+5.29%), BSR (+3.61%).

• BSC50 +1.08%. Positive stocks: HAH (+6.96%), POW (+6.95%), VGC (+6.94%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.97%	1.08%	0.71%	0.77%
1 week	5.36%	5.66%	3.95%	3.83%
1 months	9.03%	16.44%	10.32%	10.12%
3 months	22.27%	29.31%	22.79%	25.57%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,608.22	276.47	109.20
% 1D	0.71%	0.00%	-0.05%
TV (VND bn)	43,790	3,120	1,179
%1D	-1.26%	-17.81%	-8.50%
Foreign (VND bn)	-691.64	-17.73	-20.32

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VPB	103.44	FPT	-171.30
STB	83.52	VHM	-155.48
POW	53.71	SSI	-124.93
CTG	49.49	HPG	-118.86
KDH	43.48	MWG	-92.72

Source: FiinPro-X, BSC compiled

Overview of global stock markets

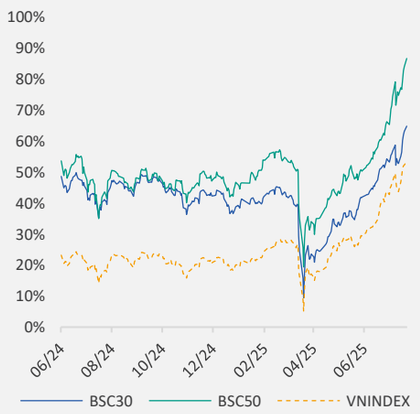
		%D	%W
SPX	6,373	-0.25%	0.69%
FTSE100	9,155	0.28%	0.14%
Eurostoxx	5,337	0.15%	1.75%
Shanghai	3,666	0.50%	1.34%
Nikkei	42,718	2.15%	6.02%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	66.57	-0.21%
Gold	3,346	-1.52%
Exchange rate		
USD/VND	26,430	0.11%
EUR/VND	31,286	-0.08%
JPY/VND	181	-0.55%
Interst rates		
10Y-Gov bond rate	3.49%	-0.01%
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)
BID	41.50	3.23%	2.18	7.02
LPB	38.05	6.28%	1.66	2.99
VCB	63.00	0.80%	0.98	8.36
MBB	32.40	1.89%	0.87	6.10
HDB	28.90	3.58%	0.84	3.51

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VHM	93.00	-0.53%	-0.47	4.11
SSI	36.75	-2.00%	-0.34	1.97
GEE	129.00	-3.01%	-0.33	0.37
VIB	19.90	-1.97%	-0.27	2.98
GEX	58.80	-2.00%	-0.25	0.90

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
HUT	18.50	2.21%	0.25	0.89
NVB	17.20	1.78%	0.24	1.17
KSF	69.00	1.62%	0.23	0.30
PVS	37.90	1.34%	0.16	0.48
LHC	108.30	9.95%	0.10	0.01

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
SHS	23.90	-2.05%	-0.30	0.89
KSV	167.10	-0.54%	-0.12	0.20
NTP	65.60	-1.06%	-0.08	0.17
VIF	16.10	-1.83%	-0.07	0.35
BAB	14.10	-0.70%	-0.06	0.96

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
HAH	63.00	6.96%	0.17	9.03
POW	16.15	6.95%	0.60	39.97
VSC	27.70	6.95%	0.16	40.33
VGC	66.30	6.94%	0.47	5.00
TCT	20.05	6.93%	0.00	0.07

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
CLW	48.20	-6.77%	-0.01	0.00
SVI	54.20	-4.91%	-0.01	0.00
S4A	34.05	-4.89%	-0.02	0.00
TNC	30.70	-4.66%	-0.01	0.00
SFC	19.75	-4.59%	0.00	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
LHC	108.30	9.95%	0.59	0.24
VNT	36.70	9.88%	0.23	0.00
SDG	14.50	9.85%	0.06	0.00
BTW	64.00	9.78%	0.22	0.00
BXH	13.90	9.45%	0.02	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
PSC	10.30	-9.65%	-0.03	0.00
BBS	14.20	-9.55%	-0.03	0.00
THS	14.30	-9.49%	-0.01	0.00
TKU	13.50	-8.16%	-0.20	0.00
SDC	7.20	-7.69%	-0.01	0.00

Figure 1
Sectors performance

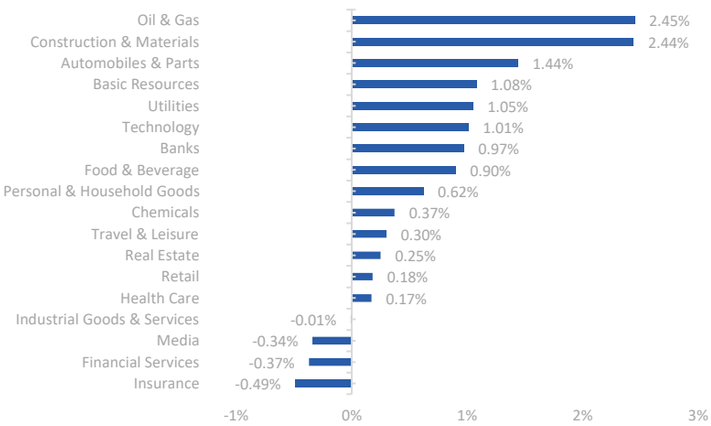
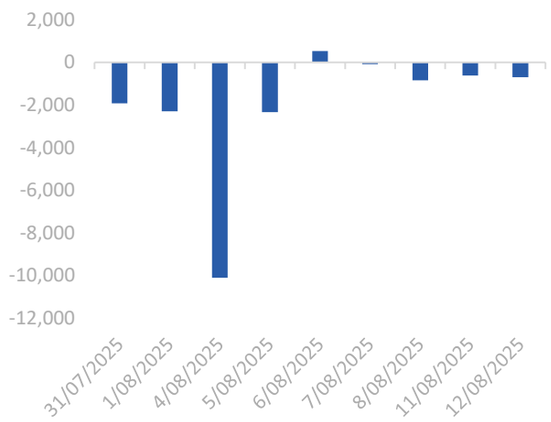


Figure 2
Foreign transactions



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	72.2	0.1%	1.4	106,597	632.7	3,304	21.8	84,700	48.9%	Link
KBC	Real Estate	33.6	0.3%	1.5	31,502	214.0	1,831	18.3		15.0%	
KDH	Real Estate	34.2	6.9%	1.4	35,911	350.4	717	44.7		32.8%	
PDR	Real Estate	23.9	5.3%	1.8	22,242	1006.6	177	128.5	23,600	9.8%	Link
VHM	Real Estate	93.0	-0.5%	0.9	384,043	478.2	6,995	13.4	81,300	10.4%	Link
FPT	Technology	107.5	1.0%	0.9	181,253	1183.7	5,092	20.9	136,500	38.9%	Link
BSR	Oil & Gas	23.0	3.6%	0.0	68,676	409.1	(16)	(1,383)		0.3%	
PVS	Oil & Gas	37.9	1.3%	1.5	17,876	381.9	2,649	14.1	38,600	12.0%	Link
HCM	Financial Services	27.8	-1.3%	1.4	30,347	420.9	1,147	24.5		38.6%	
SSI	Financial Services	36.8	-2.0%	1.4	73,945	1734.2	1,577	23.8		40.6%	
VCI	Financial Services	45.5	-0.9%	1.4	33,167	544.5	1,370	33.5		28.4%	
DCM	Chemicals	41.3	1.9%	1.5	21,467	253.3	3,221	12.6	47,300	6.3%	Link
DGC	Chemicals	107.9	1.5%	1.3	40,370	524.0	8,205	13.0	109,300	14.6%	Link
ACB	Banks	24.3	-0.6%	0.8	125,334	356.8	3,305	7.4	30,400	30.0%	Link
BID	Banks	41.5	3.2%	0.9	282,259	641.4	3,683	10.9	47,000	17.5%	Link
CTG	Banks	48.0	1.1%	1.2	255,075	686.7	5,608	8.5	50,000	26.9%	Link
HDB	Banks	28.9	3.6%	1.1	97,512	891.8	4,094	6.8	26,400	17.5%	Link
MBB	Banks	32.4	1.9%	1.1	194,052	1819.5	4,021	7.9	28,200	23.2%	Link
MSB	Banks	15.4	0.3%	1.0	39,910	229.0	1,961	7.8	14,000	28.6%	Link
STB	Banks	54.0	0.6%	1.0	101,236	381.4	6,148	8.7		20.3%	
TCB	Banks	37.7	-0.1%	1.1	267,506	853.9	3,019	12.5	39,800	22.5%	Link
TPB	Banks	19.2	-1.8%	1.2	51,650	819.2	2,423	8.1	-	24.7%	Link
VCB	Banks	63.0	0.8%	0.8	522,230	791.4	4,148	15.1	75,700	22.0%	Link
VIB	Banks	19.9	-2.0%	0.9	69,101	350.2	2,219	9.2	23,000	5.0%	Link
VPB	Banks	29.6	0.0%	1.1	234,844	1246.5	2,193	13.5	26,500	25.8%	Link
HPG	Basic Resources	28.5	1.2%	1.3	216,064	2414.4	1,750	16.1	35,800	22.3%	Link
HSG	Basic Resources	19.9	0.5%	1.6	12,264	352.6	751	26.3	16,800	9.6%	Link
DBC	Food & Beverage	31.3	0.8%	1.4	11,931	305.3	4,124	7.5	32,200	5.1%	Link
MSN	Food & Beverage	83.6	2.0%	1.4	118,565	1143.4	1,862	44.0	92,700	25.3%	Link
VNM	Food & Beverage	61.8	0.5%	0.6	128,532	334.5	4,101	15.0	64,500	48.9%	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	48.2	1.80%	1.5	10,367	203.9	2,216	21.4	26.46%	16.2%	Link
FRT	Retail	150.0	-0.66%	0.6	25,716	151.1	3,163	47.7	33.19%	24.9%	Link
BVH	Insurance	53.4	-0.37%	1.1	39,789	48.3	3,311	16.2	27.10%	10.6%	
DIG	Real Estate	23.2	-0.86%	1.5	15,094	858.8	183	127.4	4.89%	1.5%	
DXG	Real Estate	21.6	-0.23%	1.6	22,008	544.4	353	61.2	25.78%	2.8%	Link
HDC	Real Estate	37.3	3.04%	1.4	6,448	371.4	482	75.1	6.01%	3.8%	
HDG	Real Estate	28.8	1.95%	1.4	10,451	246.7	522	54.1	17.19%	3.1%	Link
IDC	Real Estate	49.5	0.00%	1.5	16,335	211.7	4,574	10.8	17.96%	27.3%	
NLG	Real Estate	43.6	2.47%	1.5	16,366	163.2	1,709	24.9	49.13%	6.9%	Link
SIP	Real Estate	66.5	-0.75%	1.3	16,222	38.6	5,315	12.6	4.19%	28.6%	
SZC	Real Estate	38.1	-0.13%	1.3	6,866	107.6	1,978	19.3	2.67%	11.4%	Link
TCH	Real Estate	25.4	1.40%	1.5	16,705	278.9	1,125	22.2	11.93%	8.0%	Link
VIC	Real Estate	115.5	0.00%	1.0	441,633	344.7	3,580	32.3	3.92%	9.9%	
VRE	Real Estate	29.5	0.34%	1.0	66,693	128.2	1,937	15.2	18.44%	10.4%	Link
CMG	Technology	41.6	0.36%	1.3	8,758	87.3	1,701	24.4	36.69%	12.5%	Link
PLX	Oil & Gas	38.5	1.45%	1.0	48,219	189.0	1,596	23.8	16.54%	7.9%	Link
PVD	Oil & Gas	23.0	0.00%	1.3	12,785	345.2	1,428	16.1	4.35%	5.0%	Link
FTS	Financial Services	41.6	-0.48%	1.5	14,484	321.3	1,348	31.0	26.34%	10.9%	
MBS	Financial Services	36.5	0.00%	1.6	20,907	196.9	1,554	23.5	6.09%	12.1%	
GAS	Utilities	70.5	0.14%	1.0	164,924	119.7	5,152	13.7	1.85%	19.4%	Link
POW	Utilities	16.2	6.95%	1.2	35,362	629.0	624	24.2	3.12%	4.5%	Link
REE	Utilities	68.6	1.03%	0.9	36,779	126.1	4,418	15.4	49.00%	12.6%	Link
VJC	Travel & Leisure	127.0	2.42%	0.6	73,360	471.0	3,427	36.2	7.89%	9.9%	
GEX	Industrial Goods & Services	58.8	-2.00%	1.7	54,144	903.9	1,745	34.4	7.83%	11.1%	Link
GMD	Industrial Goods & Services	60.8	3.23%	1.1	24,749	414.9	3,765	15.6	39.44%	12.0%	Link
HAH	Industrial Goods & Services	63.0	6.96%	1.2	9,946	561.3	5,700	10.3	6.00%	30.7%	Link
PVT	Industrial Goods & Services	19.0	0.80%	1.1	8,835	210.4	2,304	8.2	8.85%	13.9%	Link
VTP	Industrial Goods & Services	116.6	-1.19%	0.0	14,370	63.3	3,339	35.3	5.10%	25.4%	
PNJ	Personal & Household Goods	87.5	1.16%	1.0	29,229	67.9	6,129	14.1	48.95%	18.2%	Link
TCM	Personal & Household Goods	32.6	-1.66%	1.0	3,714	82.2	2,693	12.3	49.93%	13.3%	
TNG	Personal & Household Goods	22.0	-1.79%	1.5	2,746	44.4	2,844	7.9	17.14%	18.6%	Link
DPM	Chemicals	28.8	2.31%	1.4	19,140	215.6	957	29.4	8.41%	5.8%	Link
GVR	Chemicals	32.5	-0.46%	1.5	130,400	193.0	1,320	24.7	0.69%	9.8%	
EIB	Banks	27.6	-1.08%	1.0	51,970	319.7	1,783	15.7	5.24%	13.1%	Link
LPB	Banks	38.1	6.28%	0.4	106,945	352.0	3,324	10.8	0.87%	23.3%	Link
NAB	Banks	15.6	0.00%	0.0	26,679	37.7	2,260	6.9	1.93%	19.6%	
OCB	Banks	12.8	-1.16%	0.9	34,487	134.2	1,130	11.5	19.81%	9.4%	Link
NKG	Basic Resources	16.9	0.90%	1.5	7,497	298.2	666	25.2	5.94%	3.6%	Link
ANV	Food & Beverage	27.1	2.07%	1.6	7,069	121.0	1,871	14.2	3.14%	16.8%	Link
BAF	Food & Beverage	35.9	0.70%	0.5	10,838	295.5	1,921	18.6	4.05%	15.0%	
SAB	Food & Beverage	48.3	0.21%	0.7	61,820	64.4	3,185	15.1	58.88%	17.5%	
VHC	Food & Beverage	59.6	1.36%	1.2	13,198	115.6	6,372	9.2	20.09%	16.1%	Link
BMP	Construction & Materials	140.5	-0.14%	0.6	11,518	28.9	13,894	10.1	85.52%	39.8%	Link
CTD	Construction & Materials	82.7	-0.60%	1.4	8,439	76.5	4,512	18.4	47.80%	5.1%	Link
CTR	Construction & Materials	94.8	0.32%	1.2	10,809	69.3	4,928	19.2	6.94%	29.9%	Link
DPG	Construction & Materials	47.8	4.37%	1.5	4,617	273.2	2,501	18.3	4.11%	12.8%	
HHV	Construction & Materials	15.1	2.73%	1.4	7,287	487.2	1,077	13.6	11.31%	5.2%	Link
PC1	Construction & Materials	28.2	4.44%	1.1	9,656	365.7	1,179	22.9	14.73%	7.6%	Link
VCG	Construction & Materials	26.3	-0.38%	1.2	17,034	311.4	1,241	21.2	9.20%	9.9%	
VGC	Construction & Materials	66.3	6.94%	1.4	27,798	326.7	3,343	18.6	5.79%	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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