Vietnam Daily Review

CORRECTION MOMENTUM EASES

Monday, 18 August 2025

STOCK MARKET

The VN-Index traded sideways within the 1,625–1,645 range throughout the day before closing at 1,636.37 points, up more than 6 points from yesterday. Market breadth tilted positive, with 14 out of 18 sectors gaining. Oil & Gas led the rally, followed by Media, while Travel & Leisure posted the steepest decline. On the foreign trading side, net selling was recorded across all three exchanges, with notable net sales of over VND 2 trillion on the HSX. The long lower shadow in today's candlestick suggests that the correction phase has stabilized. In the coming sessions, the VN-Index may establish a new price base within the 1,625–1,665 range.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30, except 41I1F8000.

COVERED WARRANTS

During the trading session on 18/08/2025, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

• VN-Index +6.37 points, closing at 1636.37 points. HNX-Index +1.53 points, closing at 283.87 points.

• Pulling the index up: VPB (+1.72), BSR (+1.32), VIX (+0.88), LPB (+0.79), HPG (+0.73).

• Pulling the index down: MBB (-0.63), CTG (-0.62), VPL (-0.54), STB (-0.48), HVN (-0.43).

• The matched trade value of VN-Index reached VND 42,809 billion, decreased -25.56% compared to the previous session. The total transaction value reached VND 45,231 billion.

• The trading range is 17.1 points. The market had 199 gainers, 48 remaining unchanged, 130 losers.

• Foreign investors' net selling value: VND -1950.21 billion on HOSE, including SHB (VND -264.68 billion), VPB (VND -189.86 billion), FPT (VND -164.36 billion), VIX (VND -162.24 billion), MBB (VND -158.93 billion). Foreign investors were net sellers on HNX with the value of VND -97.89 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 +0.83%. Positive stocks: BSR (+7.00%), PDR (+6.88%), KBC (+6.86%).

• BSC50 +0.81%. Positive stocks: HDG (+6.93%), PC1 (+6.85%), HHV (+6.78%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.83%	0.81%	0.39%	0.17%
1 week	1.43%	1.07%	2.47%	2.55%
1 months	8.37%	13.49%	9.29%	8.67%
3 months	25.09%	31.37%	24.42%	26.92%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,636.37	283.87	108.97
% 1D	0.39%	0.54%	-0.58%
TV (VND bn)	42,809	3,393	1,041
%1D	-25.56%	-24.79%	-33.18%
Foreign (VND bn)	-1950.21	-97.89	-20.18

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
GMD	155.53	SHB	-264.68
VCB	122.15	VPB	-189.86
PDR	112.21	FPT	-164.36
HPG	57.40	VIX	-162.24
BSR	33.07	MBB	-158.93

Source: FiinPro-X, BSC compiled

Overview of global stock markets

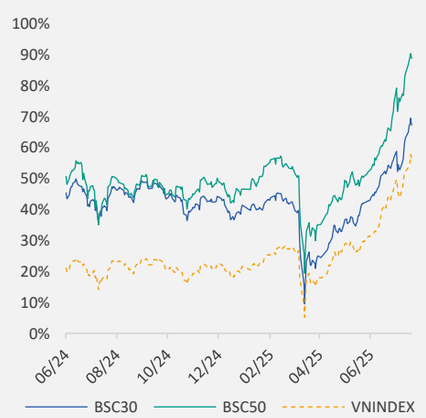
		%D	%W
SPX	6,450	-0.29%	0.94%
FTSE100	9,136	-0.04%	0.06%
Eurostoxx	5,425	-0.36%	1.80%
Shanghai	3,728	0.85%	2.21%
Nikkei	43,711	0.77%	4.52%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	66.21	0.55%
Gold	3,349	0.39%
Exchange rate		
USD/VND	26,470	0.08%
EUR/VND	31,546	0.22%
JPY/VND	182	-0.55%
Interst rates		
10Y-Gov bond rate	3.50%	-0.06%
1M-interbank rate	4.89%	

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)
VPB	32.00	2.89%	1.72	7.93
BSR	26.00	7.00%	1.32	3.10
VIX	37.00	6.63%	0.88	1.53
LPB	40.10	2.82%	0.79	2.99
HPG	28.40	1.43%	0.73	7.68

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
MBB	27.80	-1.59%	-0.63	6.10
CTG	48.50	-1.02%	-0.62	5.37
VPL	81.60	-1.57%	-0.54	1.79
STB	52.80	-2.04%	-0.48	1.89
HVN	29.65	-2.79%	-0.43	2.21

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSF	75.00	5.63%	0.86	0.30
IPA	25.60	9.87%	0.36	0.21
PVI	67.10	1.67%	0.18	0.23
VCS	51.50	2.39%	0.13	0.16
PTI	27.40	5.38%	0.12	0.12

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
KSV	164.00	-1.50%	-0.33	0.20
BAB	15.00	-3.23%	-0.31	0.96
THD	27.30	-1.80%	-0.13	0.38
VFS	20.10	-2.43%	-0.04	0.13
HGM	318.00	-1.55%	-0.04	0.01

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
BSR	26.00	7.00%	1.30	11.92
SAM	9.68	6.96%	0.06	4.95
VSC	36.20	6.94%	0.22	12.03
HDG	33.95	6.93%	0.20	13.33
PET	38.60	6.93%	0.07	2.42

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
FUCVREIT	7.86	-6.76%	0.00	0.00
FUEIP100	10.92	-6.67%	0.00	0.00
TCO	13.00	-5.80%	-0.01	0.61
TNT	8.90	-4.30%	0.00	0.15
STG	35.10	-3.84%	-0.03	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
IPA	25.60	9.87%	2.05	0.54
L40	26.90	9.80%	0.11	0.14
VNT	44.10	9.70%	0.27	0.00
VIG	8.00	9.59%	0.13	2.42
BST	9.30	9.41%	0.00	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
ATS	14.60	-9.88%	-0.02	0.00
VHL	10.10	-8.18%	-0.08	0.00
DS3	5.80	-7.94%	-0.02	0.00
QTC	16.60	-7.78%	-0.01	0.00
PTX	20.80	-7.14%	-0.04	0.00

Figure 1
Sectors performance

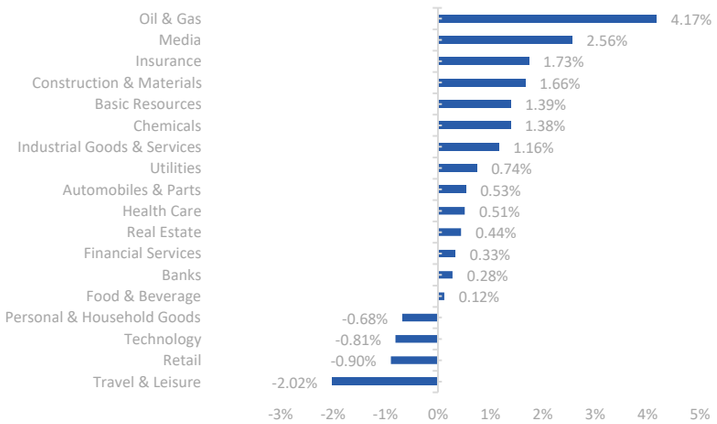
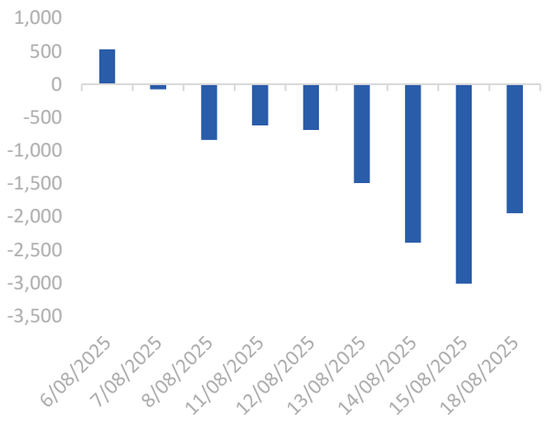


Figure 2
Foreign transactions



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	70.0	-0.7%	1.3	103,492	623.1	3,304	21.2	84,700	48.6%	Link
KBC	Real Estate	35.1	6.9%	1.3	33,009	390.2	1,831	19.2	-	14.9%	Link
KDH	Real Estate	37.0	4.2%	1.3	41,522	361.7	717	51.6		33.1%	
PDR	Real Estate	25.7	6.9%	1.6	25,132	1357.4	177	145.2	23,600	10.1%	Link
VHM	Real Estate	93.9	-0.1%	1.0	385,686	420.7	6,995	13.4	92,000	10.3%	Link
FPT	Technology	100.5	-0.9%	0.7	171,202	1158.1	5,092	19.7	118,700	37.9%	Link
BSR	Oil & Gas	26.0	7.0%	0.0	80,613	309.7	(16)	(1,624)	23,200	0.3%	Link
PVS	Oil & Gas	37.2	0.8%	1.4	17,780	340.5	2,649	14.1	38,600	11.5%	Link
HCM	Financial Services	28.6	-1.4%	1.5	30,887	454.5	1,137	25.2		38.9%	
SSI	Financial Services	35.8	-2.1%	1.4	70,593	1819.9	1,577	22.7		39.9%	
VCI	Financial Services	44.5	-1.8%	1.4	32,156	621.8	1,369	32.5		28.3%	
DCM	Chemicals	43.4	5.7%	1.4	22,949	500.3	3,221	13.5	47,300	6.3%	Link
DGC	Chemicals	103.4	-0.2%	1.4	39,269	259.4	8,175	12.7	109,300	14.2%	Link
ACB	Banks	27.1	1.9%	0.9	138,947	786.1	3,305	8.2	28,400	30.0%	Link
BID	Banks	40.8	-0.5%	1.0	286,472	307.1	3,683	11.1	47,000	17.4%	Link
CTG	Banks	48.5	-1.0%	1.1	260,445	618.0	5,608	8.7	50,000	26.9%	Link
HDB	Banks	30.5	-1.6%	1.2	106,599	879.0	4,094	7.5	30,800	17.5%	Link
MBB	Banks	27.8	-1.6%	1.1	223,929	1438.2	3,046	9.1	34,300	23.2%	Link
MSB	Banks	15.7	-1.3%	1.1	40,690	358.8	1,961	8.0	14,000	28.5%	Link
STB	Banks	52.8	-2.0%	1.1	99,539	686.3	6,148	8.6		20.4%	
TCB	Banks	38.0	0.9%	1.0	268,923	976.2	3,019	12.6	39,800	22.5%	Link
TPB	Banks	20.2	3.3%	1.2	53,235	1011.1	2,423	8.3	-	24.9%	Link
VCB	Banks	64.5	0.3%	0.9	538,941	554.8	4,148	15.6	75,700	21.9%	Link
VIB	Banks	20.1	-1.2%	1.0	68,421	203.2	2,219	9.1	23,000	5.0%	Link
VPB	Banks	32.0	2.9%	1.0	253,886	1495.7	2,193	14.6	26,500	26.0%	Link
HPG	Basic Resources	28.4	1.4%	1.3	217,983	1965.3	1,750	16.2	34,300	22.1%	Link
HSG	Basic Resources	19.8	1.5%	1.4	12,264	244.8	751	26.3	23,800	9.4%	Link
DBC	Food & Beverage	29.5	-3.0%	1.4	11,334	394.1	4,124	7.1	32,200	4.4%	Link
MSN	Food & Beverage	83.9	1.0%	1.2	121,312	826.6	1,862	45.1	92,700	25.4%	Link
VNM	Food & Beverage	60.7	-0.5%	0.7	126,860	294.5	4,101	14.8	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	44.6	-1.76%	1.4	9,775	128.3	2,216	20.1	25.46%	16.2%	Link
FRT	Retail	138.3	-2.95%	0.9	23,553	50.3	3,163	43.7	32.77%	24.9%	Link
BVH	Insurance	62.8	1.62%	1.2	46,618	108.8	3,311	19.0	27.13%	10.6%	
DIG	Real Estate	23.5	0.86%	1.5	15,191	768.7	183	128.2	4.79%	1.5%	
DXG	Real Estate	21.2	-0.24%	1.6	21,549	690.5	353	59.9	25.83%	2.8%	Link
HDC	Real Estate	36.8	1.38%	1.3	6,563	254.0	482	76.4	5.81%	3.8%	
HDG	Real Estate	34.0	6.93%	1.5	12,560	439.9	522	65.0	18.05%	3.1%	Link
IDC	Real Estate	44.1	0.23%	1.3	16,736	164.5	3,977	11.1	17.96%	27.3%	
NLG	Real Estate	44.8	0.22%	1.4	17,251	239.4	1,709	26.2	49.01%	6.9%	Link
SIP	Real Estate	64.4	0.00%	1.2	15,592	27.6	5,315	12.1	4.21%	28.6%	
SZC	Real Estate	38.0	0.53%	1.1	6,839	69.8	1,978	19.2	3.15%	11.4%	Link
TCH	Real Estate	24.6	-0.40%	1.5	16,438	295.0	1,125	21.9	12.25%	8.0%	Link
VIC	Real Estate	118.2	0.00%	1.0	451,957	422.5	3,580	33.0	3.93%	9.9%	
VRE	Real Estate	30.0	-1.16%	0.9	68,056	140.0	1,937	15.5	18.16%	10.4%	Link
CMG	Technology	42.8	-3.39%	1.3	9,063	92.8	1,701	25.2	38.66%	12.5%	Link
PLX	Oil & Gas	38.8	0.78%	1.0	49,299	125.3	1,596	24.3	16.58%	7.9%	Link
PVD	Oil & Gas	22.9	0.44%	1.2	12,702	229.5	1,428	16.0	3.98%	5.0%	Link
FTS	Financial Services	40.6	-1.46%	1.4	14,068	211.0	1,348	30.1	25.52%	10.9%	
MBS	Financial Services	44.1	0.00%	1.7	25,260	330.5	1,554	28.4	6.40%	12.1%	
GAS	Utilities	70.0	0.43%	1.1	163,987	82.5	5,152	13.6	1.85%	19.4%	Link
POW	Utilities	16.4	3.15%	1.3	38,290	264.7	624	26.2	3.07%	4.5%	Link
REE	Utilities	66.0	-0.90%	0.8	35,749	67.9	4,418	14.9	49.00%	12.6%	Link
VJC	Travel & Leisure	142.4	-2.20%	0.9	84,245	291.5	3,427	41.6	8.19%	9.9%	
GEX	Industrial Goods & Services	56.0	-1.06%	1.5	50,534	1154.4	1,745	32.1	7.62%	11.1%	Link
GMD	Industrial Goods & Services	63.3	6.03%	1.1	26,598	426.2	3,765	16.8	39.32%	12.0%	Link
HAH	Industrial Goods & Services	64.4	4.04%	1.2	10,875	280.6	5,700	11.3	6.37%	30.7%	Link
PVT	Industrial Goods & Services	19.2	2.41%	1.2	8,999	98.7	2,304	8.3	8.21%	13.9%	Link
VTP	Industrial Goods & Services	109.2	-0.55%	0.0	13,299	55.3	3,339	32.7	5.08%	25.4%	
PNJ	Personal & Household Goods	85.0	-1.39%	1.1	28,722	88.9	6,129	13.9	48.93%	18.2%	Link
TCM	Personal & Household Goods	31.5	-0.16%	1.0	3,524	41.6	2,693	11.7	49.83%	13.3%	
TNG	Personal & Household Goods	21.3	0.95%	1.5	2,611	24.7	2,844	7.5	16.89%	18.6%	Link
DPM	Chemicals	28.7	2.14%	1.2	19,514	256.8	957	30.0	8.15%	5.8%	Link
GVR	Chemicals	31.8	1.11%	1.3	127,000	158.3	1,320	24.1	0.63%	9.8%	
EIB	Banks	30.5	2.69%	1.2	56,813	1160.3	1,783	17.1	5.12%	13.1%	Link
LPB	Banks	40.1	2.82%	0.5	119,790	164.4	3,324	12.1	0.85%	23.3%	Link
NAB	Banks	15.8	-1.25%	0.0	27,022	26.5	2,260	7.0	1.88%	19.6%	
OCB	Banks	12.8	-1.92%	1.0	33,954	164.0	1,130	11.3	19.73%	9.4%	Link
NKG	Basic Resources	17.2	2.38%	1.5	7,698	341.4	666	25.8	6.13%	3.6%	Link
ANV	Food & Beverage	27.1	1.88%	1.5	7,216	121.0	1,871	14.5	2.90%	16.8%	Link
BAF	Food & Beverage	35.6	0.71%	0.6	10,823	170.9	1,921	18.5	3.51%	15.0%	
SAB	Food & Beverage	47.2	-0.74%	0.7	60,473	49.2	3,185	14.8	58.82%	17.5%	
VHC	Food & Beverage	58.0	-1.69%	1.2	13,018	108.3	6,372	9.1	20.23%	16.1%	Link
BMP	Construction & Materials	135.9	0.30%	0.8	11,125	11.5	13,894	9.8	85.32%	39.8%	Link
CTD	Construction & Materials	80.9	0.25%	1.4	8,206	54.1	4,512	17.9	47.40%	5.1%	Link
CTR	Construction & Materials	91.7	-0.43%	1.2	10,489	55.6	4,928	18.6	6.38%	29.9%	Link
DPG	Construction & Materials	48.2	2.99%	1.5	4,853	177.4	2,501	19.3	4.82%	12.8%	
HHV	Construction & Materials	15.8	6.78%	1.4	7,835	483.6	1,077	14.6	10.59%	5.2%	Link
PC1	Construction & Materials	30.4	6.85%	1.2	10,872	660.6	1,179	25.8	14.51%	7.6%	Link
VCG	Construction & Materials	27.6	2.41%	1.3	17,843	876.0	1,241	22.2	8.91%	9.9%	
VGC	Construction & Materials	65.7	0.61%	1.4	29,457	201.7	3,343	19.7	5.76%	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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