Vietnam Daily Review

PROFIT-TAKING PRESSURE EMERGED AHEAD OF THE 1,700 LEVEL

Friday, 22 August 2025

STOCK MARKET

The VN-Index dropped nearly 43 points today, closing at 1,645.47. Market breadth was negative, with all 18 out of 18 sectors declining. The Media sector recorded the sharpest loss, followed by the Oil & Gas sector. Regarding foreign trading, net selling was seen across all three exchanges—HSX, HNX, and UPCOM. In the coming sessions, the VN-Index may continue to seek a balancing point above the SMA10 level. Investors are advised to trade cautiously as market volatility remains high.

FUTURES CONTRACTS

Futures contracts decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 22/08/2025, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

• VN-Index -42.53 points, closing at 1645.47 points. HNX-Index -11.91 points, closing at 272.48 points.

• Pulling the index up: BID (+1.64), VCB (+0.81), MSB (+0.35), NAB (+0.32), KBC (+0.24).

• Pulling the index down: VPB (-4.80), TCB (-4.07), HPG (-2.45), GVR (-1.97), ACB (-1.87).

• The matched trade value of VN-Index reached VND 60,793 billion, increased 24.31% compared to the previous session. The total transaction value reached VND 62,462 billion.

• The trading range is 62.22 points. The market had 76 gainers, 27 remaining unchanged, 275 losers.

• Foreign investors' net selling value: VND -1377.81 billion on HOSE, including HPG (VND -1044.94 billion), VPB (VND -325.72 billion), STB (VND -110.24 billion), VNM (VND -96.82 billion), VCB (VND -92.58 billion). Foreign investors were net sellers on HNX with the value of VND -50.58 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 -2.47%. Positive stocks: MSB (+3.15%), KBC (+2.64%), BID (+2.25%).

• BSC50 -2.90%. Positive stocks: NAB (+4.62%), BMP (+2.67%), POW (+2.48%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-2.47%	-2.90%	-2.52%	-3.25%
1 week	1.13%	0.54%	0.95%	1.73%
1 months	8.75%	11.42%	8.81%	9.74%
3 months	27.25%	32.49%	25.18%	28.71%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,645.47	272.48	109.26
% 1D	-2.52%	-4.19%	-1.19%
TV (VND bn)	60,793	4,275	1,445
%1D	24.31%	31.28%	-3.14%
Foreign (VND bn)	-1377.81	-50.58	-113.13

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VIX	180.60	HPG	-1044.94
PDR	129.62	VPB	-325.72
BSR	86.84	STB	-110.24
POW	69.87	VNM	-96.82
HDB	69.87	VCB	-92.58

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	6,411	-0.59%	-0.53%
FTSE100	9,167	-0.24%	0.02%
Eurostoxx	5,475	-0.21%	1.70%
Shanghai	3,766	1.04%	2.25%
Nikkei	42,633	0.05%	-0.80%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	67.45	-0.32%
Gold	3,330	-1.60%
Exchange rate		
USD/VND	26,562	0.10%
EUR/VND	31,481	-0.40%
JPY/VND	182	-0.55%
Interst rates		
10Y-Gov bond rate	3.67%	0.05%
1M-interbank rate	4.90%	

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	43.25	2.25%	1.64	7.02
VCB	64.60	0.62%	0.81	8.36
MSB	18.00	3.15%	0.35	2.60
NAB	17.00	4.62%	0.32	1.72
KBC	40.80	2.64%	0.24	0.94

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VPB	35.95	-6.99%	-4.80	7.93
TCB	39.00	-6.14%	-4.07	7.06
HPG	26.00	-5.11%	-2.45	7.68
GVR	29.50	-6.94%	-1.97	4.00
ACB	27.85	-5.43%	-1.87	5.14

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
NTP	60.30	1.01%	0.07	0.17
PRE	20.50	2.50%	0.04	0.10
INN	59.50	1.54%	0.01	0.02
LDP	12.40	9.73%	0.01	0.01
VDL	11.20	9.80%	0.01	0.01

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
NVB	16.60	-8.79%	-1.22	1.17
HUT	17.30	-9.90%	-1.09	0.89
MBS	38.10	-6.39%	-0.99	0.57
SHS	25.10	-5.64%	-0.90	0.89
IDC	43.30	-6.68%	-0.68	0.33

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
TN1	13.15	6.91%	0.01	0.10
EVG	10.40	6.89%	0.04	6.10
VDS	25.00	6.84%	0.11	12.44
DLG	3.16	6.76%	0.02	7.18
GIL	19.00	6.74%	0.03	0.87

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
TNT	7.98	-6.99%	-0.01	0.32
BSI	51.90	-6.99%	-0.21	3.41
BFC	47.25	-6.99%	-0.04	1.57
VPB	35.95	-6.99%	-4.70	75.61
HHS	15.35	-6.97%	-0.11	20.25

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
VDL	11.20	9.80%	0.07	0.00
BXH	15.70	9.79%	0.02	0.00
LDP	12.40	9.73%	0.07	0.64
HKT	13.70	9.60%	0.03	0.00
GMX	17.80	7.23%	0.05	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
HUT	17.30	-9.90%	-7.54	9.37
L14	41.30	-9.83%	-0.52	1.76
THS	12.40	-9.49%	-0.01	0.00
NAG	14.60	-9.32%	-0.22	0.87
QST	26.00	-9.09%	-0.03	0.00

Figure 1
Sectors performance

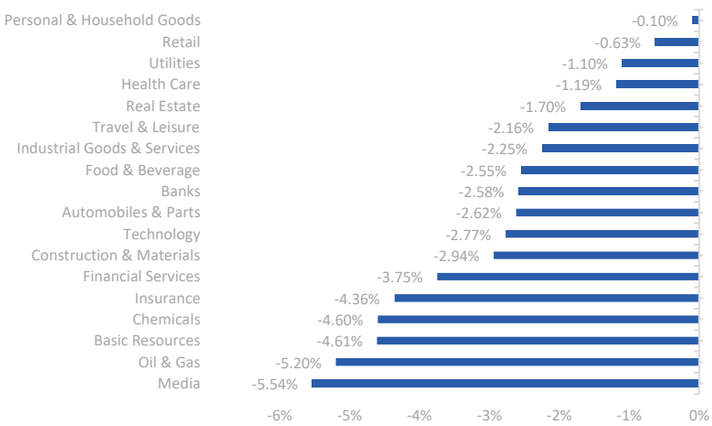
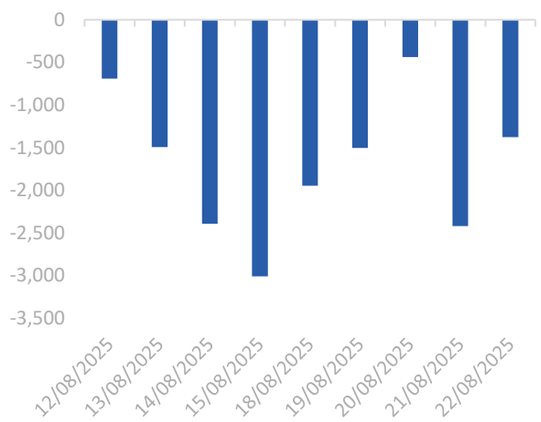


Figure 2
Foreign transactions



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	70.3	-1.0%	1.5	104,970	802.8	3,304	21.5	84,700	48.0%	Link
KBC	Real Estate	40.8	2.6%	1.4	37,435	888.9	1,831	21.7	-	14.8%	Link
KDH	Real Estate	34.0	-5.3%	1.2	40,288	300.5	717	50.1		32.7%	
PDR	Real Estate	24.0	1.1%	1.5	23,270	1192.5	177	134.5	28,200	10.7%	Link
VHM	Real Estate	98.1	-1.7%	1.1	409,920	610.6	6,995	14.3	92,000	10.2%	Link
FPT	Technology	99.0	-2.7%	1.0	173,247	722.4	5,092	20.0	118,700	37.2%	Link
BSR	Oil & Gas	27.9	-6.9%	0.0	92,705	1048.3	(16)	(1,867)	23,200	0.4%	Link
PVS	Oil & Gas	34.2	-2.3%	1.3	16,729	280.4	2,649	13.2	42,800	11.3%	Link
HCM	Financial Services	26.7	-5.3%	1.4	30,455	586.8	1,133	24.9		38.3%	
SSI	Financial Services	35.8	-3.5%	1.4	73,058	2306.7	1,577	23.5		39.9%	
VCI	Financial Services	43.3	-5.9%	1.2	33,240	672.1	1,369	33.6		28.4%	
DCM	Chemicals	38.2	-5.5%	1.3	21,388	417.3	2,805	14.4	47,300	6.7%	Link
DGC	Chemicals	98.8	2.2%	1.4	36,725	327.1	8,175	11.8	109,300	14.0%	Link
ACB	Banks	27.9	-5.4%	0.9	151,275	1282.2	3,305	8.9	28,400	30.0%	Link
BID	Banks	43.3	2.3%	1.0	297,004	995.9	3,683	11.5	49,500	17.4%	Link
CTG	Banks	50.9	-1.7%	1.1	278,166	1254.4	5,608	9.2	53,500	26.8%	Link
HDB	Banks	32.4	-2.7%	1.1	116,211	1005.6	4,075	8.2	30,800	17.4%	Link
MBB	Banks	26.9	-4.6%	1.1	227,151	1992.8	3,046	9.3	34,300	22.9%	Link
MSB	Banks	18.0	3.2%	1.1	45,370	1255.5	1,961	8.9	14,000	28.4%	Link
STB	Banks	55.5	-4.0%	1.0	108,965	1235.7	6,148	9.4		20.2%	
TCB	Banks	39.0	-6.1%	1.2	294,433	2513.1	3,019	13.8	39,800	22.5%	Link
TPB	Banks	21.6	-2.0%	1.3	58,255	1749.8	2,423	9.1	-	24.7%	Link
VCB	Banks	64.6	0.6%	0.7	536,434	1260.8	4,148	15.5	75,700	21.9%	Link
VIB	Banks	23.6	0.9%	0.9	79,654	1486.1	2,219	10.6	23,000	5.0%	Link
VPB	Banks	36.0	-7.0%	1.1	306,646	2755.4	2,193	17.6	26,500	25.7%	Link
HPG	Basic Resources	26.0	-5.1%	1.2	210,308	3629.1	1,750	15.7	34,300	21.5%	Link
HSG	Basic Resources	18.4	-2.1%	1.3	11,674	225.2	751	25.0	23,800	9.7%	Link
DBC	Food & Beverage	27.5	0.2%	1.4	10,565	284.6	4,124	6.7	32,200	4.1%	Link
MSN	Food & Beverage	81.0	-3.9%	1.2	121,891	1517.9	1,862	45.3	92,700	25.2%	Link
VNM	Food & Beverage	58.7	-2.3%	0.5	125,606	426.3	4,101	14.7	64,500	48.8%	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	42.0	1.20%	1.5	9,096	122.6	2,216	18.7	24.94%	16.2%	Link
FRT	Retail	130.6	1.63%	1.0	21,884	78.5	3,163	40.6	32.05%	24.9%	Link
BVH	Insurance	57.1	-4.83%	1.2	44,539	70.1	3,311	18.1	27.15%	10.6%	
DIG	Real Estate	22.7	-6.78%	1.4	15,741	1147.7	183	132.8	5.26%	1.5%	
DXG	Real Estate	20.2	-4.05%	1.4	21,397	856.7	353	59.5	26.28%	2.8%	Link
HDC	Real Estate	33.4	-5.26%	1.1	6,278	386.1	482	73.1	6.66%	3.8%	
HDG	Real Estate	31.8	1.93%	1.4	11,524	343.8	522	59.6	18.18%	3.1%	Link
IDC	Real Estate	43.3	-6.68%	1.4	17,609	138.4	3,977	11.7	17.06%	27.3%	
NLG	Real Estate	42.3	1.44%	1.4	16,058	254.7	1,709	24.4	47.50%	6.9%	Link
SIP	Real Estate	58.7	-5.78%	1.1	15,084	49.7	5,315	11.7	4.11%	28.6%	
SZC	Real Estate	34.8	-5.56%	1.1	6,632	126.8	1,978	18.6	2.66%	11.4%	Link
TCH	Real Estate	20.6	-3.75%	1.4	18,546	428.2	1,123	19.0	12.47%	8.0%	Link
VIC	Real Estate	124.1	-0.72%	1.3	477,958	624.3	3,580	34.9	3.86%	9.9%	
VRE	Real Estate	30.0	-1.32%	1.1	69,078	314.2	1,937	15.7	18.02%	10.4%	Link
CMG	Technology	39.8	-4.56%	1.2	8,830	54.8	1,701	24.5	38.50%	12.5%	Link
PLX	Oil & Gas	36.0	-2.57%	0.8	46,885	142.6	1,596	23.1	16.54%	7.9%	Link
PVD	Oil & Gas	21.3	-2.75%	1.1	12,146	191.6	1,428	15.3	3.96%	5.0%	Link
FTS	Financial Services	38.0	-5.82%	1.5	13,981	266.4	1,348	29.9	25.15%	10.9%	
MBS	Financial Services	38.1	-6.39%	1.8	23,312	385.0	1,554	26.2	6.33%	12.1%	
GAS	Utilities	68.0	-1.88%	0.9	162,347	82.0	5,152	13.5	1.83%	19.4%	Link
POW	Utilities	16.5	2.48%	1.0	37,704	527.5	624	25.8	3.05%	4.5%	Link
REE	Utilities	64.5	-2.42%	1.0	35,804	69.4	4,418	15.0	49.00%	12.6%	Link
VJC	Travel & Leisure	140.0	-3.98%	0.7	86,257	482.9	3,427	42.5	8.02%	9.9%	
GEX	Industrial Goods & Services	53.9	-2.00%	1.3	49,632	578.0	1,745	31.5	7.53%	11.1%	Link
GMD	Industrial Goods & Services	61.7	-1.12%	1.0	26,220	236.3	3,765	16.6	40.12%	12.0%	Link
HAH	Industrial Goods & Services	56.3	-5.38%	1.0	10,047	229.1	5,700	10.4	6.22%	30.7%	Link
PVT	Industrial Goods & Services	17.9	-1.10%	1.2	8,506	86.4	2,304	7.9	8.28%	13.9%	Link
VTP	Industrial Goods & Services	98.6	-3.90%	0.0	12,495	73.0	3,339	30.7	5.01%	25.4%	
PNJ	Personal & Household Goods	84.8	-0.93%	1.0	28,925	74.8	6,129	14.0	48.99%	18.2%	Link
TCM	Personal & Household Goods	30.0	1.01%	0.8	3,328	64.8	2,693	11.0	49.81%	13.3%	
TNG	Personal & Household Goods	19.5	-1.02%	1.3	2,415	40.1	2,841	6.9	16.66%	18.6%	Link
DPM	Chemicals	26.3	-3.66%	1.3	18,562	147.4	957	28.5	7.49%	5.8%	Link
GVR	Chemicals	29.5	-6.94%	1.5	126,800	277.2	1,320	24.0	0.57%	9.8%	
EIB	Banks	29.0	-6.91%	1.1	57,931	911.2	1,783	17.4	5.19%	13.1%	Link
LPB	Banks	47.0	-2.89%	0.4	144,584	316.6	3,324	14.6	0.85%	23.3%	Link
NAB	Banks	17.0	4.62%	0.0	27,880	122.6	2,260	7.2	1.79%	19.6%	
OCB	Banks	14.6	-0.34%	1.0	38,881	555.3	1,130	12.9	19.77%	9.4%	Link
NKG	Basic Resources	15.3	-4.69%	1.3	7,161	311.8	666	24.0	6.47%	3.6%	Link
ANV	Food & Beverage	24.3	-6.91%	1.6	6,936	182.7	1,871	13.9	2.77%	16.8%	Link
BAF	Food & Beverage	35.1	-4.10%	0.7	11,127	295.5	1,921	19.1	4.06%	15.0%	
SAB	Food & Beverage	45.8	-1.72%	1.1	59,767	90.5	3,185	14.6	58.76%	17.5%	
VHC	Food & Beverage	55.7	-1.24%	1.3	12,659	78.7	6,372	8.9	19.93%	16.1%	Link
BMP	Construction & Materials	134.5	2.67%	1.0	10,724	29.3	13,894	9.4	84.91%	39.8%	Link
CTD	Construction & Materials	74.5	-3.25%	1.3	7,810	101.8	4,512	17.1	46.82%	5.1%	Link
CTR	Construction & Materials	86.2	-3.79%	1.2	10,249	79.1	4,928	18.2	6.40%	29.9%	Link
DPG	Construction & Materials	42.4	-6.92%	1.2	4,586	260.5	2,501	18.2	4.70%	12.8%	
HHV	Construction & Materials	15.1	0.67%	1.4	7,461	400.3	1,077	13.9	10.90%	5.2%	Link
PC1	Construction & Materials	27.9	-6.84%	1.1	10,711	295.7	1,179	25.4	15.04%	7.6%	Link
VCG	Construction & Materials	24.6	-4.84%	1.2	16,679	500.8	1,241	20.8	8.62%	9.9%	
VGC	Construction & Materials	60.5	-6.92%	1.4	29,143	192.5	3,343	19.5	5.78%	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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