STOCK MARKET

The VN-Index dropped more than 31 points today, closing at 1,614.03. Market breadth tilted to the negative side with 15 out of 18 sectors declining, led by Oil & Gas and Banking. On the other hand, Insurance and Real Estate posted a positive session. Regarding foreign investors, they recorded net selling across all three exchanges: HSX, HNX, and UPCOM. The VN-Index has fallen below the 10-day moving average (MA10). Market sentiment has become cautious after a steep rally; however, today's correction came with modest liquidity, indicating no significant panic selling pressure. In the next 1–2 sessions, the index may continue its inertia-driven decline toward the next support range of 1,590–1,600, potentially forming a short-term bottom there.

FUTURES CONTRACTS

Futures contracts decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 25/08/2025, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

• VN-Index -31.44 points, closing at 1614.03 points. HNX-Index -5.90 points, closing at 266.58 points.

• Pulling the index up: VIC (+6.75), SSI (+0.44), GAS (+0.40), VJC (+0.33), VHM (+0.30).

• Pulling the index down: VPB (-4.33), BID (-3.58), TCB (-2.36), CTG (-2.23), VCB (-1.97).

• The matched trade value of VN-Index reached VND 40,131 billion, decreased -33.99% compared to the previous session. The total transaction value reached VND 42,337 billion.

• The trading range is 52.94 points. The market had 100 gainers, 42 remaining unchanged, 233 losers.

• Foreign investors' net selling value: VND -1755.76 billion on HOSE, including HPG (VND -586.03 billion), VPB (VND -433.81 billion), STB (VND -244.56 billion), VHM (VND -230.03 billion), FPT (VND -176.85 billion). Foreign investors were net sellers on HNX with the value of VND -24.74 billion.

BSC30, BSC50 PERFORMANCE

• BSC30 -3.11%. Positive stocks: SSI (+2.52%), VHM (+0.31%).

• BSC50 -1.63%. Positive stocks: VIC (+5.56%), ANV (+3.09%), BMP (+2.60%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-3.11%	-1.63%	-1.91%	-1.70%
1 week	-1.85%	-4.11%	-1.37%	-0.18%
1 months	5.29%	5.36%	5.41%	6.82%
3 months	20.72%	22.98%	20.47%	24.92%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,614.03	266.58	108.58
% 1D	-1.91%	-2.17%	-0.62%
TV (VND bn)	40,131	2,622	932
%1D	-33.99%	-38.81%	-40.69%
Foreign (VND bn)	-1755.76	-24.74	-7.73

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MBB	289.64	HPG	-586.03
SSI	81.33	VPB	-433.81
SHB	80.67	STB	-244.56
DXG	73.43	VHM	-230.03
GEX	58.88	FPT	-176.85

Source: FiinPro-X, BSC compiled

Overview of global stock markets

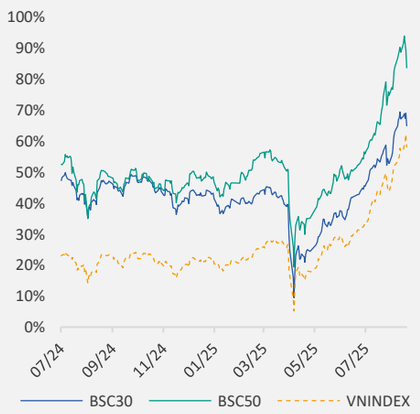
		%D	%W
SPX	6,467	0.87%	0.01%
FTSE100	9,321	1.68%	1.57%
Eurostoxx	5,464	-0.20%	0.61%
Shanghai	3,884	1.51%	5.05%
Nikkei	42,709	0.41%	-1.30%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	67.88	0.23%
Gold	3,363	-0.34%
Exchange rate		
USD/VND	26,480	-0.15%
EUR/VND	31,548	0.69%
JPY/VND	183	1.10%
Interst rates		
10Y-Gov bond rate	3.68%	0.01%
1M-interbank rate	5.25%	

Source: FiinPro-X, BSC compiled

Performances of BSC30, BSC50



Source: BSC

Contents

Market outlook	Page 1
Market statistics	Page 2
BSC30	Page 3
BSC50	Page 4
Disclaimer	Page 5

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
VIC	131.00	5.56%	6.75	3.88
SSI	36.65	2.52%	0.44	1.97
GAS	68.70	1.03%	0.40	2.34
VJC	142.50	1.79%	0.33	0.54
VHM	98.40	0.31%	0.30	4.11

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VPB	33.50	-6.82%	-4.33	7.93
BID	41.00	-5.20%	-3.58	7.02
TCB	37.55	-3.72%	-2.36	7.06
CTG	49.10	-3.54%	-2.23	5.37
VCB	63.60	-1.55%	-1.97	8.36

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
MBS	38.50	1.05%	0.16	0.57
VIF	16.40	3.14%	0.12	0.35
NTP	61.00	1.16%	0.08	0.17
SEB	49.90	5.05%	0.06	0.03
SJ1	12.60	7.69%	0.03	0.04

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
NVB	15.10	-9.04%	-1.11	1.17
SHS	24.00	-4.38%	-0.65	0.89
BAB	14.00	-6.04%	-0.56	0.96
KSV	153.10	-2.48%	-0.53	0.20
PVS	33.00	-3.51%	-0.38	0.48

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
VOS	15.30	6.99%	0.04	3.07
FUEFCV50	15.40	6.94%	0.00	0.01
HVH	14.75	6.88%	0.01	1.01
GIL	20.30	6.84%	0.03	1.06
HAG	17.20	6.83%	0.29	43.39

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
VDS	23.25	-7.00%	-0.10	7.60
VIB	21.95	-6.99%	-1.22	42.85
PC1	25.95	-6.99%	-0.15	18.60
BFC	43.95	-6.98%	-0.04	1.93
TVS	21.35	-6.97%	-0.06	0.89

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
CAN	35.40	9.94%	0.07	0.00
SGD	32.60	9.76%	0.05	0.00
LDP	13.60	9.68%	0.07	0.43
PPE	11.80	9.26%	0.01	0.00
VCM	7.70	8.45%	0.02	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
QST	23.50	-9.62%	-0.03	0.00
HKT	12.40	-9.49%	-0.03	0.01
GKM	4.90	-9.26%	-0.06	2.13
NVB	15.10	-9.04%	-6.53	2.82
NAG	13.40	-8.22%	-0.17	0.95

Figure 1
Sectors performance

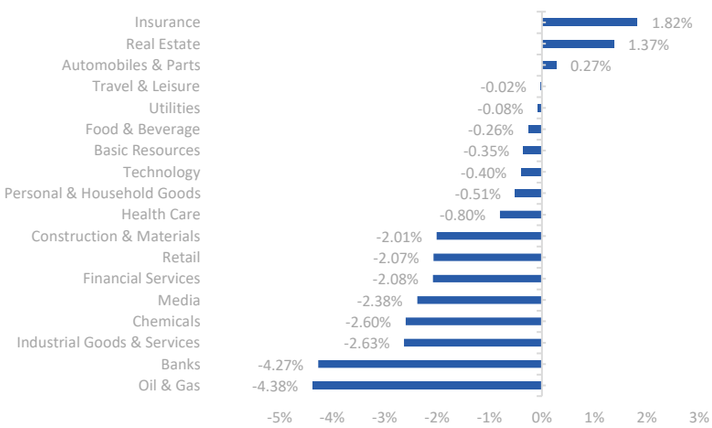
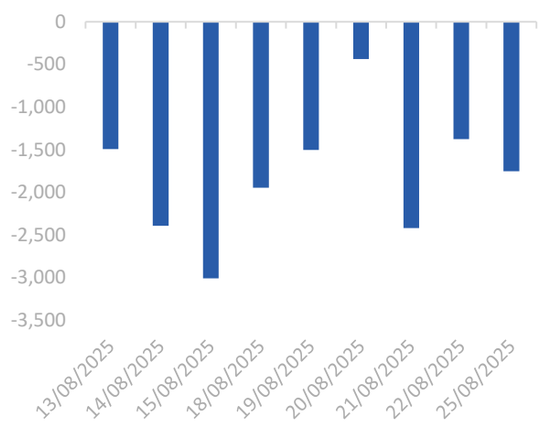


Figure 2
Foreign transactions



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	68.8	-2.1%	1.4	101,718	474.0	3,304	20.8	84,700	48.0%	Link
KBC	Real Estate	38.7	-5.3%	1.3	36,399	484.0	1,831	21.1	-	14.8%	Link
KDH	Real Estate	33.7	-1.0%	1.3	37,763	209.7	716	47.0		32.7%	
PDR	Real Estate	23.2	-3.3%	1.6	22,732	432.9	177	131.4	28,200	10.7%	Link
VHM	Real Estate	98.4	0.3%	0.9	404,169	613.1	6,995	14.1	92,000	10.2%	Link
FPT	Technology	98.8	-0.2%	0.7	168,307	781.8	5,092	19.4	118,700	37.2%	Link
BSR	Oil & Gas	26.0	-6.8%	0.0	80,458	704.4	(16)	(1,613)	23,200	0.4%	Link
PVS	Oil & Gas	33.0	-3.5%	1.5	15,773	203.2	2,644	12.5	42,800	11.3%	Link
HCM	Financial Services	26.0	-2.6%	1.5	28,079	381.6	1,127	23.1		38.3%	
SSI	Financial Services	36.7	2.5%	1.4	72,269	2564.8	1,577	23.2		39.9%	
VCI	Financial Services	42.8	-1.2%	1.4	30,927	423.4	1,369	31.3		28.4%	
DCM	Chemicals	37.6	-1.6%	1.4	19,905	177.3	2,805	13.4	47,300	6.7%	Link
DGC	Chemicals	97.0	-1.8%	1.4	36,839	173.9	8,175	11.9	109,300	14.0%	Link
ACB	Banks	26.2	-5.9%	0.9	134,580	1020.6	3,305	7.9	28,400	30.0%	Link
BID	Banks	41.0	-5.2%	1.0	287,876	479.0	3,683	11.1	49,500	17.4%	Link
CTG	Banks	49.1	-3.5%	1.2	263,667	787.7	5,608	8.8	53,500	26.8%	Link
HDB	Banks	31.3	-3.3%	1.2	109,395	747.2	4,075	7.7	30,800	17.4%	Link
MBB	Banks	26.2	-2.6%	1.1	211,041	1497.5	3,046	8.6	34,300	22.9%	Link
MSB	Banks	16.8	-6.9%	1.1	43,550	965.5	1,961	8.5	14,000	28.4%	Link
STB	Banks	53.0	-4.5%	1.1	99,916	1219.3	6,148	8.6		20.2%	
TCB	Banks	37.6	-3.7%	1.0	266,088	1572.3	3,018	12.4	39,800	22.5%	Link
TPB	Banks	20.1	-6.9%	1.2	53,103	1218.7	2,423	8.3	-	24.7%	Link
VCB	Banks	63.6	-1.6%	0.9	531,421	506.6	4,148	15.3	75,700	21.9%	Link
VIB	Banks	22.0	-7.0%	1.0	74,718	964.8	2,219	9.9	23,000	5.0%	Link
VPB	Banks	33.5	-6.8%	1.0	265,786	2345.1	2,193	15.3	26,500	25.7%	Link
HPG	Basic Resources	26.0	-0.2%	1.3	199,178	1798.7	1,750	14.8	34,300	21.5%	Link
HSG	Basic Resources	18.0	-2.2%	1.4	11,178	151.6	751	24.0	23,800	9.7%	Link
DBC	Food & Beverage	26.3	-4.6%	1.4	10,103	197.6	4,124	6.4	32,200	3.6%	Link
MSN	Food & Beverage	79.5	-1.9%	1.3	114,950	1196.8	1,862	42.7	92,700	25.2%	Link
VNM	Food & Beverage	58.7	0.0%	0.7	122,680	199.0	4,101	14.3	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	40.5	-3.57%	1.4	8,876	70.0	2,216	18.3	24.94%	16.2%	Link
FRT	Retail	128.9	-1.30%	0.9	21,952	58.3	3,163	40.8	32.05%	24.9%	Link
BVH	Insurance	58.5	2.45%	1.2	43,426	40.0	3,311	17.7	27.15%	10.6%	
DIG	Real Estate	21.3	-6.17%	1.5	13,769	564.6	183	116.2	5.26%	1.5%	
DXG	Real Estate	20.5	1.49%	1.5	20,836	672.1	353	57.9	26.28%	2.8%	Link
HDC	Real Estate	33.4	0.00%	1.3	5,948	140.5	482	69.3	6.66%	3.8%	
HDG	Real Estate	29.7	-6.61%	1.5	10,969	234.5	522	56.8	18.18%	3.1%	Link
IDC	Real Estate	42.3	-2.31%	1.4	16,053	273.6	3,977	10.6	17.06%	27.3%	
NLG	Real Estate	40.7	-3.78%	1.4	15,673	110.4	1,709	23.8	47.50%	6.9%	Link
SIP	Real Estate	57.8	-1.53%	1.3	13,994	16.1	5,315	10.9	4.11%	28.6%	
SZC	Real Estate	34.1	-2.01%	1.1	6,138	45.8	1,978	17.2	2.66%	11.4%	Link
TCH	Real Estate	20.4	-0.97%	1.4	17,678	168.0	1,120	18.2	12.47%	8.0%	Link
VIC	Real Estate	131.0	5.56%	0.9	504,745	502.3	3,580	36.6	3.86%	9.9%	
VRE	Real Estate	30.0	0.00%	0.9	68,170	194.3	1,937	15.5	18.02%	10.4%	Link
CMG	Technology	39.1	-1.76%	1.3	8,279	30.4	1,701	23.0	38.50%	12.5%	Link
PLX	Oil & Gas	35.9	-0.28%	1.0	45,551	74.3	1,596	22.5	16.54%	7.9%	Link
PVD	Oil & Gas	20.8	-2.35%	1.3	11,535	120.8	1,428	14.5	3.96%	5.0%	Link
FTS	Financial Services	37.1	-2.37%	1.5	12,855	142.3	1,348	27.5	25.15%	10.9%	
MBS	Financial Services	38.5	1.05%	1.8	22,052	289.9	1,554	24.8	6.33%	12.1%	
GAS	Utilities	68.7	1.03%	1.2	160,942	66.8	5,152	13.3	1.83%	19.4%	Link
POW	Utilities	15.9	-3.64%	1.2	37,236	216.9	624	25.5	3.05%	4.5%	Link
REE	Utilities	64.0	-0.78%	0.8	34,666	37.1	4,417	14.5	49.00%	12.6%	Link
VJC	Travel & Leisure	142.5	1.79%	0.9	84,305	352.1	3,427	41.6	8.02%	9.9%	
GEX	Industrial Goods & Services	53.0	-1.67%	1.4	47,827	405.1	1,745	30.4	7.53%	11.1%	Link
GMD	Industrial Goods & Services	60.4	-2.11%	1.2	25,380	195.1	3,765	16.0	40.12%	12.0%	Link
HAH	Industrial Goods & Services	53.5	-4.97%	1.2	9,034	192.4	5,700	9.4	6.22%	30.7%	Link
PVT	Industrial Goods & Services	17.7	-1.12%	1.3	8,318	64.6	2,304	7.7	8.28%	13.9%	Link
VTP	Industrial Goods & Services	99.2	0.61%	0.0	12,081	61.4	3,339	29.7	5.01%	25.4%	
PNJ	Personal & Household Goods	83.5	-1.53%	1.1	28,215	45.1	6,129	13.6	48.99%	18.2%	Link
TCM	Personal & Household Goods	30.0	0.00%	1.0	3,361	27.5	2,693	11.1	49.81%	13.3%	
TNG	Personal & Household Goods	19.5	0.00%	1.5	2,391	16.5	2,841	6.9	16.66%	18.6%	Link
DPM	Chemicals	26.0	-1.14%	1.2	17,678	88.7	957	27.2	7.49%	5.8%	Link
GVR	Chemicals	28.4	-3.73%	1.3	113,600	144.2	1,320	21.5	0.57%	9.8%	
EIB	Banks	27.0	-6.91%	1.2	50,200	699.3	1,783	15.1	5.19%	13.1%	Link
LPB	Banks	45.0	-4.26%	0.5	134,428	239.4	3,324	13.5	0.85%	23.3%	Link
NAB	Banks	16.0	-5.88%	0.0	27,451	70.6	2,260	7.1	1.79%	19.6%	
OCB	Banks	13.6	-6.87%	1.0	36,084	231.5	1,130	12.0	19.77%	9.4%	Link
NKG	Basic Resources	15.3	0.33%	1.5	6,848	121.2	666	23.0	6.47%	3.6%	Link
ANV	Food & Beverage	25.0	3.09%	1.5	6,656	118.9	1,871	13.4	2.77%	16.8%	Link
BAF	Food & Beverage	34.5	-1.85%	0.7	10,474	196.2	1,921	17.9	4.06%	15.0%	
SAB	Food & Beverage	45.6	-0.44%	0.6	58,485	48.6	3,185	14.3	58.76%	17.5%	
VHC	Food & Beverage	55.0	-1.26%	1.2	12,345	65.2	6,372	8.6	19.93%	16.1%	Link
BMP	Construction & Materials	138.0	2.60%	0.7	11,297	34.5	13,894	9.9	84.91%	39.8%	Link
CTD	Construction & Materials	74.1	-0.54%	1.4	7,516	33.7	4,512	16.4	46.82%	5.1%	Link
CTR	Construction & Materials	83.8	-2.78%	1.2	9,586	54.8	4,928	17.0	6.40%	29.9%	Link
DPG	Construction & Materials	42.3	-0.24%	1.4	4,259	105.4	2,501	16.9	4.70%	12.8%	
HHV	Construction & Materials	14.3	-5.63%	1.4	7,088	259.0	1,077	13.2	10.90%	5.2%	Link
PC1	Construction & Materials	26.0	-6.99%	1.2	9,281	506.6	1,179	22.0	15.04%	7.6%	Link
VCG	Construction & Materials	24.6	0.00%	1.3	15,871	260.6	1,241	19.8	8.62%	9.9%	
VGC	Construction & Materials	59.3	-1.98%	1.4	26,587	89.5	3,343	17.7	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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