

STOCK MARKET

The VN-Index today continued to fluctuate around the 1,270 level and closed at 1,271.98 points, remaining flat compared to yesterday. Market breadth was fairly balanced, with 10 out of 18 sectors gaining, led by the Basic Resources sector, which rose nearly 2%. On the other hand, the Retail sector led the declines, followed by the Automobile and Auto Parts sectors,... Regarding foreign trading, foreign investors recorded a slight net sell on both the HSX and HNX exchanges today. Trading range has shown signs of narrowing. The VN-Index may continue to consolidate at this level in the short term.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 08/10/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **+2.05** points, closing at **1271.98** points. HNX-Index -0.95 points, closing at 231.52 points.
- Pulling the index up: **LPB (+1.01)**, **HPG (+0.87)**, **VNM (+0.57)**, **TCB (+0.43)**, **VHM (+0.43)**.
- Pulling the index down: **VCB (-0.67)**, **MWG (-0.38)**, **BID (-0.21)**, **GAS (-0.17)**, **SAB (-0.12)**.
- The matched trade value of VN-Index reached VND **14,928 billion**, increased **39.52%** compared to the previous session. The total transaction value reached VND 15,689 billion.
- The trading range is 8.88 points. The market had **176** gainers, 79 remaining unchanged, **179** losers.
- Foreign investors' net selling value: VND **-118.22 billion** on HOSE, including **MWG (VND -120.98 billion)**, **BMP (VND -64.87 billion)**, **STB (VND -63.43 billion)**, **FPT (VND -53.79 billion)**, **VPB (VND -37.75 billion)**. Foreign investors were net sellers on HNX with the value of VND **-113.05 billion**.

BSC30, BSC50 PERFORMANCE

- BSC30 **+0.10%**. Positive stocks: **STB (+2.11%)**, **PVS (+1.20%)**, **SSI (+1.10%)**.
- BSC50 **+0.26%**. Positive stocks: **VCI (+3.72%)**, **PTB (+2.88%)**, **MSB (+2.77%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.10%	0.26%	-0.05%	-0.05%
1 week	-1.42%	-2.35%	-1.35%	-1.21%
1 months	0.68%	1.16%	0.86%	1.63%
3 months	0.22%	-4.00%	-0.22%	2.55%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,271.98	231.52	92.45
% 1D	0.16%	-0.41%	-0.02%
TV (bil VND)	14,928	1,405	497
%1D	39.52%	74.14%	50.03%
Foreign (bil VND)	-118.22	-113.05	4.05

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
TCB	138.75	MWG	-120.98
HPG	136.65	BMP	-64.87
LPB	83.44	STB	-63.43
VNM	57.36	FPT	-53.79
HAH	36.96	VPB	-37.75

Overview of global stock markets

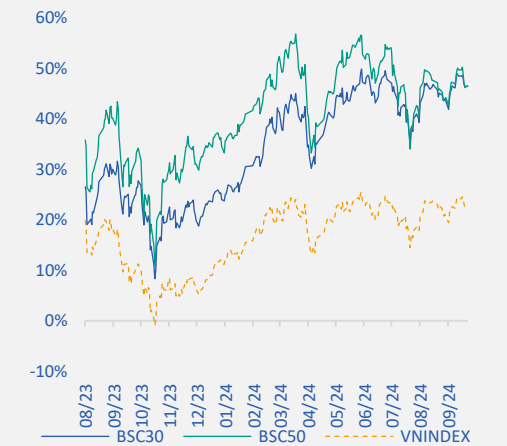
		%D	%W
SPX	5,696	-0.96%	-1.15%
FTSE100	8,197	-1.29%	-0.97%
Eurostoxx	4,919	-1.07%	-0.59%
Shanghai	3,491	4.63%	21.93%
Nikkei	38,908	-1.26%	0.66%

Source: Bloomberg

	Close	%
Commodities		
Brent	80	-1.37%
Gold	2,643	-0.48%
Exchange rate		
USD/VND	25,025	-0.02%
EUR/VND	28,038	0.03%
JPY/VND	171	
Interest rates		
10Y-Gov bond rate	2.68%	-0.01%
1M-interbank rate	3.85%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

Contents

Market outlook	Page 1
Market statistics	Page 2
BSC30	Page 4
BSC50	Page 5
Disclaimer	Page 6

MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
LPB	33.30	4.88%	1.01	2.56
HPG	26.95	2.08%	0.87	6.40
VNM	68.20	1.64%	0.57	2.09
TCB	24.40	1.04%	0.43	7.05
VHM	41.60	0.97%	0.43	4.35

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
NTP	61.50	3.36%	0.19	0.13
PVI	46.10	1.54%	0.12	0.23
BCF	39.00	7.14%	0.07	0.03
HUT	16.40	0.61%	0.06	0.89
VGS	38.20	2.14%	0.03	0.06

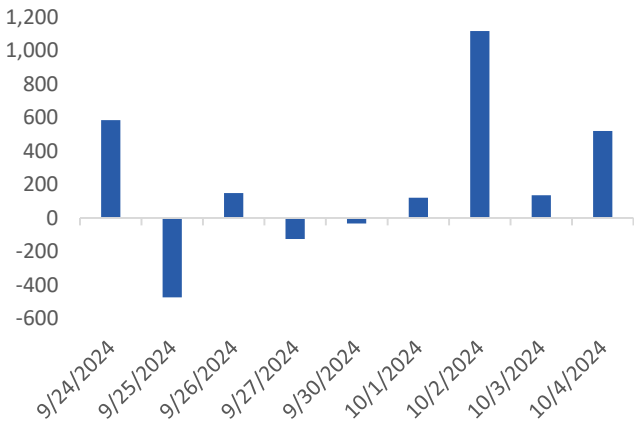
Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
MSH	47.50	6.98%	0.06	0.50
HHV	10.75	6.97%	0.08	9.46
BMC	21.60	6.93%	0.00	0.44
VRC	8.81	6.92%	0.01	0.15
STG	43.95	6.80%	0.07	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BPC	14.40	9.92%	0.01	0.03
DTC	8.90	9.88%	0.01	0.00
HTC	5.60	9.80%	0.02	0.06
PIA	23.90	9.63%	0.14	0.00
PCT	34.00	8.97%	0.05	0.00

Figure 1
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VCB	91.50	-0.54%	-0.67	5.59
MWG	65.20	-1.66%	-0.38	1.46
BID	48.90	-0.31%	-0.21	5.70
GAS	72.60	-0.41%	-0.17	2.34
SAB	56.30	-0.71%	-0.12	1.28

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
MBS	30.00	-5.36%	-0.63	0.55
DTK	12.00	-4.00%	-0.23	0.68
SHS	15.40	-1.91%	-0.17	0.81
KSV	52.40	-2.24%	-0.17	0.20
VIF	16.40	-3.53%	-0.15	0.35

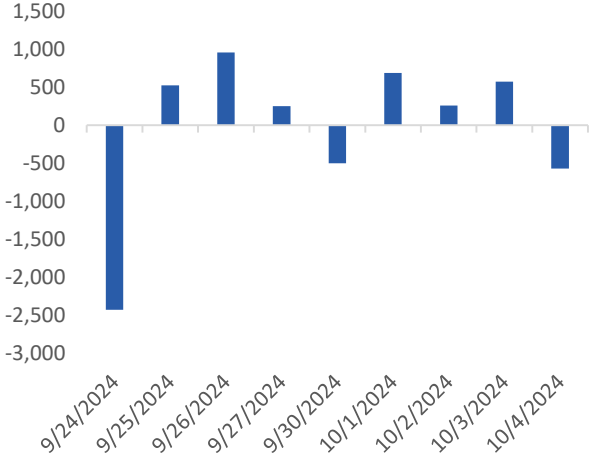
Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HVN	10.00	-6.98%	-0.01	1.92
HAG	10.75	-6.93%	-0.19	35.41
HHS	8.61	-6.92%	-0.05	3.41
NHA	23.55	-6.92%	-0.02	1.42
DXV	4.59	-6.90%	0.00	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
DAE	12.80	-9.86%	-0.01	0.00
HMR	21.10	-9.83%	-0.04	0.20
CMS	18.40	-9.80%	-0.17	0.61
TXM	6.50	-9.72%	-0.02	0.04
MCO	12.20	-9.63%	-0.02	0.05

Figure 2
Foreign transactions



Source: FiinProX, BSC Research

BSC30 PORTFOLIO

Stocks	Sector	Close (1,000 VND)	% Day	Beta	MC (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	TP (VND)	Foreign ownershi- p	Link
VCB	Bank	91.5	-0.50%	0.6	20,759	4.2	5,962	15.3	105,000	23.3%	Link
BID	Bank	48.9	-0.30%	1.1	11,315	3.8	4,006	12.2	54,578	17.2%	Link
VPB	Bank	20.1	0.50%	1.0	6,473	22.8	1,461	13.8	23,685	26.1%	Link
TCB	Bank	24.4	1.00%	1.2	6,978	16.1	3,047	8.0	-	20.9%	Link
MBB	Bank	25.2	0.00%	1.0	5,428	12.2	4,018	6.3	24,400	23.2%	Link
STB	Bank	33.7	-0.30%	1.3	2,579	19.0	4,340	7.8	31,200	22.9%	Link
CTG	Bank	35.8	-0.10%	1.3	7,793	9.6	3,782	9.5	19,100	26.3%	Link
ACB	Bank	25.5	0.20%	0.8	4,624	6.8	3,676	6.9	42,500	30.0%	Link
SSI	Broker	27.4	-0.70%	1.4	2,182	13.7	1,882	14.6	45,900	41.3%	Link
IDC	IP	55.9	-0.90%	1.2	749	2.4	5,573	10.0	-	24.5%	Link
HPG	Material	27.0	2.10%	1.1	6,997	41.8	1,746	15.4	23,300	23.7%	Link
HSG	Material	21.4	1.40%	1.6	534	14.0	1,844	11.6	79,900	17.3%	Link
VHM	RE	41.6	1.00%	0.9	7,353	14.5	5,350	7.8	38,900	14.2%	Link
KDH	RE	37.5	-0.70%	1.3	1,384	2.8	765	49.0	44,100	38.1%	Link
NLG	RE	40.1	-0.50%	1.2	626	2.0	1,102	36.4	46,100	48.8%	Link
DGC	Chemicals	113.9	-0.10%	1.5	1,756	4.5	7,898	14.4	85,000	18.1%	Link
DCM	Fertilizer	37.6	-0.30%	1.3	807	4.1	2,828	13.3	41,000	7.4%	Link
GAS	O&G	72.6	-0.40%	0.6	6,904	1.9	4,760	15.3	36,000	1.9%	Link
PVS	O&G	41.8	-0.50%	1.0	811	8.4	1,932	21.6	110,500	22.1%	Link
PVD	O&G	28.0	0.40%	1.4	633	7.9	1,155	24.3	45,000	15.6%	Link
POW	Utilities	12.8	0.40%	0.6	1,217	1.5	463	27.6	38,500	4.1%	Link
VHC	Fishery	70.3	0.40%	1.4	640	0.7	3,234	21.7	29,000	29.8%	Link
GMD	Logistics	75.3	-1.40%	0.9	949	2.4	4,054	18.6	14,500	48.6%	Link
VNM	Retail	68.2	1.60%	0.6	5,786	8.0	4,633	14.7	81,700	51.5%	Link
MSN	Retail	75.2	0.50%	1.2	4,618	8.5	466	161.3	27,700	28.6%	Link
MWG	Retail	65.2	-1.70%	1.2	3,869	29.1	1,507	43.3	63,800	46.9%	Link
PNJ	Retail	94.8	-0.60%	1.0	1,300	3.4	6,132	15.5	83,500	49.0%	Link
DGW	Retail	44.9	-1.80%	1.8	396	3.8	2,236	20.1	90,900	25.1%	Link
FPT	Tech	133.8	-0.20%	1.1	7,932	11.5	4,890	27.4	57,000	45.2%	Link
CTR	Tech	128.2	0.20%	1.4	595	1.7	4,590	27.9	108,000	9.4%	Link

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 (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	P/B	Foreign ownershi- p	ROE (%)
HDB	Bank	27.2	1.30%	1.0	3,216	11.1	4,137	6.6	1.6	19.5%	27.8%
VIB	Bank	19.2	0.00%	1.1	2,322	8.0	3,048	6.3	1.3	20.5%	21.4%
TPB	Bank	17.6	0.30%	1.2	1,882	22.8	2,154	8.1	1.1	28.4%	14.2%
MSB	Bank	12.8	-1.50%	1.1	1,351	7.3	2,366	5.4	0.8	29.5%	14.9%
EIB	Bank	18.8	0.00%	0.7	1,425	6.3	1,273	14.8	1.4	2.8%	9.9%
HCM	Broker	30.6	-1.60%	1.6	874	21.3	1,397	21.9	2.0	45.3%	10.6%
VCI	Broker	37.3	-0.80%	1.6	870	20.2	1,763	21.2	1.9	20.1%	9.6%
VND	Broker	14.8	-0.70%	1.5	918	5.3	1,591	9.3	1.3	13.5%	15.0%
BSI	Broker	50.6	-3.10%	1.7	458	3.7	2,165	23.4	2.1	40.0%	9.3%
SHS	Broker	15.4	-1.90%	1.7	508	7.1	1,338	11.5	1.1	8.9%	10.5%
CTD	Const	62.0	1.00%	1.4	252	0.7	2,996	20.7	0.7	47.1%	3.6%
HHV	Const	11.9	0.80%	1.7	209	1.4	869	13.7	0.6	7.7%	4.4%
LCG	Const	10.7	1.40%	1.6	84	0.8	766	14.0	0.8	2.1%	5.7%
SZC	IP	36.3	0.30%	1.1	265	1.1	1,549	23.4	2.2	3.2%	12.1%
SIP	IP	73.1	2.20%	1.4	625	1.8	5,931	12.3	3.4	2.0%	29.0%
PHR	IP	58.3	0.70%	1.0	321	0.2	3,028	19.3	2.1	18.5%	12.1%
DIG	RE	21.3	-1.80%	1.7	527	8.8	151	141.1	1.7	4.7%	1.1%
CEO	RE	15.1	-0.70%	1.8	331	2.3	318	47.4	1.3	4.8%	2.1%
KBC	IP	27.7	1.80%	1.6	863	4.0	300	92.4	1.2	20.5%	1.7%
VGC	IP	42.8	-0.60%	1.3	778	1.1	1,776	24.1	2.4	4.7%	8.2%
GVR	IP	35.0	0.70%	1.5	5,691	2.0	693	50.5	2.7	0.5%	6.5%
NKG	Material	22.0	1.40%	1.6	236	5.3	1,580	14.0	1.0	13.1%	7.4%
BMP	Material	121.6	6.90%	1.3	404	3.3	11,420	10.6	3.8	82.6%	34.6%
IJC	RE	13.4	1.10%	1.4	206	0.6	683	19.7	1.0	4.6%	6.0%
DXG	RE	15.2	0.30%	1.5	446	6.2	249	61.3	1.0	15.4%	1.9%
VRE	RE	18.4	0.50%	1.4	1,693	2.4	1,975	9.3	1.0	22.2%	11.9%
PDR	RE	21.0	0.00%	1.8	746	4.8	557	37.8	1.7	6.4%	5.0%
DIG	RE	21.3	-1.80%	1.7	527	8.8	151	141.1	1.7	4.7%	1.1%
HUT	Const	16.4	0.60%	1.1	594	2.1	64	258.4	1.7	1.5%	1.7%
C4G	Const	8.9	1.10%	1.2	-	0.1	503	17.7	0.8	0.0%	4.8%
CSV	Chemicals	37.0	-1.30%	2.0	166	2.1	4,748	7.8	1.1	3.8%	15.2%
DHC	Chemicals	37.2	-0.10%	1.2	122	0.2	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	29.0	-0.20%	0.9	140	0.6	2,509	11.6	1.8	11.7%	16.5%
PC1	Utilities	27.8	0.90%	1.4	351	1.1	1,203	23.1	1.6	13.8%	6.1%
HDG	Utilities	27.6	0.90%	1.3	378	2.2	1,958	14.1	1.5	15.7%	11.8%
GEX	Utilities	20.8	-0.50%	1.5	726	3.6	1,245	16.7	1.3	8.3%	7.0%
QTP	Utilities	14.0	-0.70%	0.6	-	0.1	1,357	10.3	1.1	1.2%	11.2%
PLX	O&G	44.6	-0.70%	0.8	2,303	3.1	2,879	15.5	2.2	18.2%	13.8%
BSR	O&G	24.4	0.40%	1.0	-	6.3	2,408	10.1	1.3	0.7%	13.4%
PLC	O&G	24.3	0.40%	1.5	80	0.1	734	33.1	1.6	0.5%	4.7%
ANV	Fishery	33.2	0.00%	1.6	179	1.1	114	291.6	1.6	1.0%	1.2%
PTB	Material	60.8	0.00%	0.9	165	0.3	4,899	12.4	1.4	24.9%	11.9%
VSC	Logistics	17.3	1.20%	1.3	201	0.8	713	24.3	1.1	3.1%	7.3%
HAH	Logistics	41.4	2.60%	1.3	204	7.8	2,800	14.8	1.8	7.7%	10.6%
VTP	Logistics	76.5	0.10%	1.6	378	0.9	2,893	26.4	5.8	6.9%	22.8%
DBC	Retail	29.3	0.70%	1.5	398	5.9	979	29.9	1.5	12.1%	5.0%
FRT	Retail	177.0	0.10%	0.8	979	2.2	(414)	-427.1	14.5	36.1%	11.8%
QNS	Retail	48.6	0.00%	0.6	-	0.5	6,678	7.3	2.0	13.8%	28.7%
TNG	Textile	24.1	-2.40%	1.3	120	2.6	2,254	10.7	1.5	19.5%	14.7%
PVT	Logistics	29.2	3.40%	1.1	422	7.4	2,805	10.4	1.5	13.2%	14.2%
DPM	Fertilizer	34.8	-0.60%	1.3	553	4.6	1,703	20.4	1.2	8.8%	5.5%
REE	Utilities	65.6	-0.30%	1.1	1,254	1.1	3,804	17.2	1.7	49.0%	10.0%

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.

DISCLAIMER

The information, statements, forecasts and projections contained herein, including any expression of opinion, are based upon sources believed to be reliable but their accuracy completeness or correctness are not guaranteed. Expressions of opinion herein were arrived at after due and careful consideration and they were based upon the best information then known to us, and in our opinion are fair and reasonable in the circumstances prevailing at the time. Expressions of opinion contained herein are subject to change without notice. This document is not, and should not be construed as, an offer or the solicitation of an offer to buy or sell any securities. BSC and other companies in the BSC and/or their officers, directors and employees may have positions and may affect transactions in securities of companies mentioned herein and may also perform or seek to perform investment banking services for these companies. This document is for private circulation only and is not for publication in the press or elsewhere. BSC accepts no liability whatsoever for any direct or consequential loss arising from any use of this or its content. The use of any information, statements forecasts and projections contained herein shall be at the sole discretion and risk of the user. No part of this material may be (i) copied, photocopied or duplicated in any form by any mean or (ii) redistributed without the prior written consent of BIDV Securities Company (BSC).

BSC Research

Trần Thăng Long

Head of BSC Research

longtt@bsc.com.vn

Macro & Market team

Bùi Nguyên Khoa

Leader of Macro - Market team

khoabn@bsc.com.vn

• VN-

Macro - Market analyst

tungtt@bsc.com.vn

Nguyễn Giang Anh

Macro - Market analyst

anhng@bsc.com.vn

Vũ Việt Anh

Macro - Market analyst

anhvv@bsc.com.vn

Phạm Thanh Thảo

Macro - Market analyst

thaopt1@bsc.com.vn

Contact Info

Website

<http://www.bsc.com.vn>

Ho Chi Minh City Office

4th, 9th Floor, President Place Tower, 93 Nguyen Cong Tru Street, I District, Ho Chi Minh City, Vietnam.

Tel: (028) 3821 8885

Fax: (028) 3821 8879

BSC Headquarters

8th, 9th floor, ThaiHoldings Tower, 210 Tran Quang Khai street, Hanoi, Vietnam

Tel: (024) 3935 2722

Fax: (024) 2220 0669

For BSC Research

BSC Research Department

hn.ptnc@bsc.com.vn

(+84) 39352722 - Ext 108

For Institutional Clients

Investment Consulting and Brokerage

hn.tvdt.khtc@bsc.com.vn

(024) 39264 659

For Individual Clients

i-Center

i-center@bsc.com.vn

(024) 39264 660