

STOCK MARKET

After fluctuating around the 1,275 level throughout the morning session, the VN-Index moved up to trade around the 1,280 level in the afternoon session before closing at 1,281.85 points, up nearly 10 points compared to yesterday. The market breadth leaned towards the positive side with 16 out of 18 sectors gaining, led by the Basic Resources sector, followed by Tourism and Leisure, Construction and Materials,... Regarding foreign trading, foreign investors recorded slight net selling on both the HSX and HNX exchanges today. The VN-Index has returned to the 1,280 resistance level today; however, more liquidity support is needed to confirm the recovery momentum.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 09/10/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **+9.87** points, closing at **1281.85** points. HNX-Index **+0.25** points, closing at **231.77** points.
- Pulling the index up: **VHM (+0.96)**, **HPG (+0.86)**, **ACB (+0.83)**, **BID (+0.76)**, **VIC (+0.66)**.
- Pulling the index down: **VCB (-0.67)**, **MWG (-0.35)**, **VNM (-0.20)**, **HDB (-0.14)**, **PLX (-0.08)**.
- The matched trade value of VN-Index reached VND **15,980** billion, increased **6.99%** compared to the previous session. The total transaction value reached VND 17,030 billion.
- The trading range is 9.97 points. The market had **255** gainers, 78 remaining unchanged, **114** losers.
- Foreign investors' net selling value: VND **-46.53** billion on HOSE, including **VPB (VND -283.71 billion)**, **MWG (VND -152.46 billion)**, **HDB (VND -100.78 billion)**, **CTG (VND -63.70 billion)**, **STB (VND -49.86 billion)**. Foreign investors were net sellers on HNX with the value of VND **-27.10** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.04%**. Positive stocks: **HPG (+2.08%)**, **VNM (+1.64%)**, **HSG (+1.43%)**.
- BSC50 **+0.27%**. Positive stocks: **BMP (+6.95%)**, **PVT (+3.36%)**, **HAH (+2.60%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.04%	0.27%	0.16%	0.27%
1 week	-1.40%	-2.46%	-1.72%	-1.72%
1 months	-0.22%	0.66%	0.37%	1.10%
3 months	1.23%	-2.54%	0.49%	3.13%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,281.85	231.77	92.45
% 1D	0.78%	0.11%	0.00%
TV (bil VND)	15,980	852	554
%1D	6.99%	-39.36%	11.53%
Foreign (bil VND)	-46.53	-27.10	-69.51

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
HPG	236.78	VPB	-283.71
TCB	196.04	MWG	-152.46
FPT	72.30	HDB	-100.78
DBC	64.99	CTG	-63.70
VHM	42.01	STB	-49.86

Overview of global stock markets

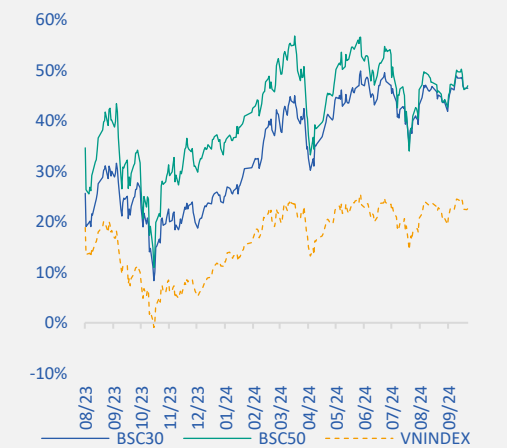
		%D	%W
SPX	5,751	0.97%	0.74%
FTSE100	8,217	0.32%	-0.89%
Eurostoxx	4,941	-0.17%	-0.22%
Shanghai	3,262	-6.52%	12.64%
Nikkei	39,300	1.01%	3.98%

Source: Bloomberg

	Close	%
Commodities		
Brent	77	-0.13%
Gold	2,643	0.26%
Exchange rate		
USD/VND	25,025	
EUR/VND	28,023	-0.05%
JPY/VND	171	
Interest rates		
10Y-Gov bond rate	0.00%	-2.68%
1M-interbank rate	3.85%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
VHM	42.50	2.16%	0.96	4.35
HPG	27.50	2.04%	0.86	6.40
ACB	26.25	2.94%	0.83	4.47
BID	49.45	1.12%	0.76	5.70
VIC	41.60	1.71%	0.66	3.82

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
DTK	12.40	3.33%	0.20	0.68
SHS	15.70	1.95%	0.18	0.81
VCS	63.50	1.93%	0.14	0.16
IDC	56.40	0.89%	0.12	0.33
CEO	15.30	1.32%	0.08	0.54

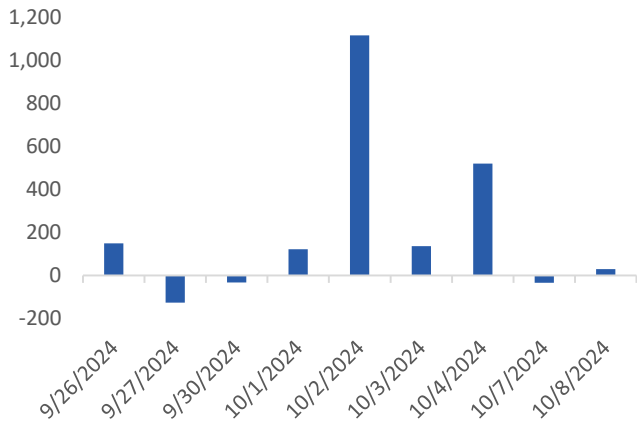
Top 5 gainers on the HSX

	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	91.00	-0.55%	-0.67	5.59
MWG	64.20	-1.53%	-0.35	1.46
VNM	67.80	-0.59%	-0.20	2.09
HDB	27.00	-0.74%	-0.14	2.91
PLX	44.40	-0.56%	-0.08	1.27

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
PVS	41.30	-1.20%	-0.17	0.48
BCF	36.40	-6.67%	-0.06	0.03
VNR	23.10	-2.12%	-0.06	0.17
NTP	60.90	-0.98%	-0.06	0.13
DHT	70.00	-1.27%	-0.05	0.08

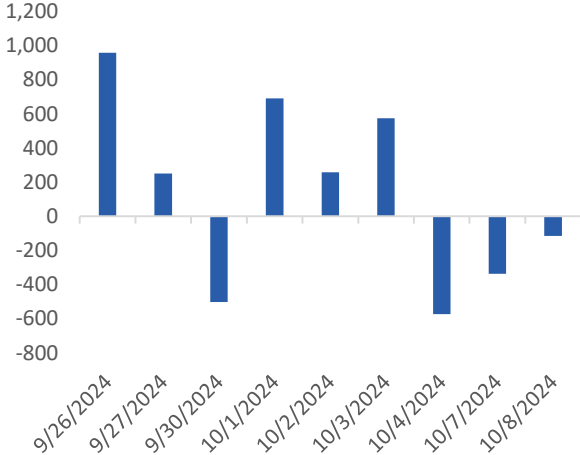
Top 5 losers on the HSX

	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	91.0	-0.50%	0.6	20,475	8.0	5,962	15.3	105,000	23.3%	<a href="#">Link</a>
BID	Bank	49.4	1.10%	1.1	11,348	4.4	4,006	12.3	54,578	17.2%	<a href="#">Link</a>
VPB	Bank	20.2	0.70%	1.0	6,468	40.4	1,461	13.9	23,685	26.1%	<a href="#">Link</a>
TCB	Bank	24.6	1.00%	1.2	6,991	21.5	3,047	8.1	-	20.9%	<a href="#">Link</a>
MBB	Bank	25.6	1.60%	1.0	5,469	14.8	4,018	6.4	24,400	23.2%	<a href="#">Link</a>
STB	Bank	34.2	1.30%	1.3	2,592	24.3	4,340	7.9	31,200	22.9%	<a href="#">Link</a>
CTG	Bank	36.1	1.00%	1.3	7,804	13.3	3,782	9.5	19,100	26.3%	<a href="#">Link</a>
ACB	Bank	26.2	2.90%	0.8	4,720	21.1	3,676	7.1	42,500	30.0%	<a href="#">Link</a>
SSI	Broker	27.3	-0.40%	1.4	2,156	18.9	1,882	14.5	45,900	41.3%	<a href="#">Link</a>
IDC	IP	56.4	0.90%	1.2	749	1.9	5,573	10.1	-	24.5%	<a href="#">Link</a>
HPG	Material	27.5	2.00%	1.1	7,081	46.1	1,746	15.8	23,300	23.7%	<a href="#">Link</a>
HSG	Material	21.3	-0.20%	1.6	528	10.0	1,844	11.5	79,900	17.3%	<a href="#">Link</a>
VHM	RE	42.5	2.20%	0.9	7,450	11.5	5,350	7.9	38,900	14.2%	<a href="#">Link</a>
KDH	RE	37.7	0.50%	1.3	1,380	1.8	765	49.3	44,100	38.1%	<a href="#">Link</a>
NLG	RE	40.5	1.00%	1.2	627	2.0	1,102	36.8	46,100	48.8%	<a href="#">Link</a>
DGC	Chemicals	115.0	1.00%	1.5	1,758	5.5	7,898	14.6	85,000	18.1%	<a href="#">Link</a>
DCM	Fertilizer	38.2	1.90%	1.3	815	4.0	2,828	13.5	41,000	7.4%	<a href="#">Link</a>
GAS	O&G	72.7	0.10%	0.6	6,856	1.6	4,760	15.3	36,000	1.9%	<a href="#">Link</a>
PVS	O&G	41.3	-1.20%	1.0	795	6.9	1,932	21.4	110,500	22.1%	<a href="#">Link</a>
PVD	O&G	27.7	-1.20%	1.4	620	5.4	1,155	24.0	45,000	15.6%	<a href="#">Link</a>
POW	Utilities	13.0	1.20%	0.6	1,221	2.3	463	28.0	38,500	4.1%	<a href="#">Link</a>
VHC	Fishery	71.5	1.70%	1.4	646	1.3	3,234	22.1	29,000	29.8%	<a href="#">Link</a>
GMD	Logistics	75.5	0.30%	0.9	944	1.0	4,054	18.6	14,500	48.6%	<a href="#">Link</a>
VNM	Retail	67.8	-0.60%	0.6	5,704	9.6	4,633	14.6	81,700	51.5%	<a href="#">Link</a>
MSN	Retail	77.0	2.40%	1.2	4,690	25.9	466	165.1	27,700	28.6%	<a href="#">Link</a>
MWG	Retail	64.2	-1.50%	1.2	3,778	53.9	1,507	42.6	63,800	46.9%	<a href="#">Link</a>
PNJ	Retail	94.4	-0.40%	1.0	1,284	2.9	6,132	15.4	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	45.5	1.30%	1.8	398	1.4	2,236	20.3	90,900	25.1%	<a href="#">Link</a>
FPT	Tech	135.4	1.20%	1.1	7,961	14.3	4,890	27.7	57,000	45.2%	<a href="#">Link</a>
CTR	Tech	133.1	3.80%	1.4	613	4.1	4,590	29.0	108,000	9.4%	<a href="#">Link</a>

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	27.0	-0.70%	1.0	3,166	12.0	4,137	6.5	1.6	19.5%	27.8%
VIB	Bank	19.2	0.00%	1.1	2,303	9.6	3,048	6.3	1.3	20.5%	21.4%
TPB	Bank	17.6	0.30%	1.2	1,872	10.7	2,154	8.2	1.1	28.4%	14.2%
MSB	Bank	12.9	0.80%	1.1	1,350	5.6	2,366	5.5	0.8	29.5%	14.9%
EIB	Bank	19.2	1.90%	0.7	1,440	7.1	1,273	15.1	1.4	2.8%	9.9%
HCM	Broker	30.6	0.20%	1.6	869	10.2	1,397	21.9	2.0	45.3%	10.6%
VCI	Broker	37.4	0.30%	1.6	865	10.9	1,763	21.2	1.9	20.1%	9.6%
VND	Broker	15.2	2.40%	1.5	932	10.3	1,591	9.6	1.3	13.5%	15.0%
BSI	Broker	51.3	1.40%	1.7	461	1.4	2,165	23.7	2.1	40.0%	9.3%
SHS	Broker	15.7	1.90%	1.7	514	5.6	1,338	11.7	1.2	8.9%	10.5%
CTD	Const	62.4	0.60%	1.4	251	1.0	2,996	20.8	0.7	47.1%	3.6%
HHV	Const	12.0	1.30%	1.7	210	2.0	869	13.9	0.6	7.7%	4.4%
LCG	Const	10.8	1.40%	1.6	84	0.6	766	14.2	0.8	2.1%	5.7%
SZC	IP	37.6	3.40%	1.1	272	3.1	1,549	24.2	2.3	3.2%	12.1%
SIP	IP	73.3	0.30%	1.4	621	0.8	5,931	12.4	3.4	2.0%	29.0%
PHR	IP	58.7	0.70%	1.0	320	0.2	3,028	19.4	2.1	18.5%	12.1%
DIG	RE	21.4	0.50%	1.7	525	4.4	151	141.8	1.7	4.7%	1.1%
CEO	RE	15.3	1.30%	1.8	333	1.2	318	48.1	1.3	4.8%	2.1%
KBC	IP	28.2	1.60%	1.6	870	6.8	300	93.9	1.2	20.5%	1.7%
VGC	IP	43.7	2.20%	1.3	789	2.1	1,776	24.6	2.4	4.7%	8.2%
GVR	IP	35.6	1.70%	1.5	5,741	2.6	693	51.4	2.8	0.5%	6.5%
NKG	Material	22.0	0.00%	1.6	234	3.3	1,580	14.0	1.0	13.1%	7.4%
BMP	Material	121.6	0.00%	1.3	401	1.6	11,420	10.6	3.8	82.6%	34.6%
IJC	RE	13.4	0.00%	1.4	204	0.3	683	19.7	1.0	4.6%	6.0%
DXG	RE	15.4	1.30%	1.5	448	3.8	249	62.1	1.0	15.4%	1.9%
VRE	RE	18.5	0.80%	1.4	1,692	2.5	1,975	9.4	1.1	22.2%	11.9%
PDR	RE	21.2	0.50%	1.8	743	3.9	557	38.0	1.7	6.4%	5.0%
DIG	RE	21.4	0.50%	1.7	525	4.4	151	141.8	1.7	4.7%	1.1%
HUT	Const	16.5	0.60%	1.1	593	1.4	64	260.0	1.7	1.5%	1.7%
C4G	Const	8.8	-1.10%	1.2	-	0.1	503	17.5	0.8	0.0%	4.8%
CSV	Chemicals	37.6	1.50%	2.0	167	1.5	4,748	7.9	1.1	3.8%	15.2%
DHC	Chemicals	37.2	0.10%	1.2	121	0.1	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	29.4	1.40%	0.9	141	0.6	2,509	11.7	1.9	11.7%	16.5%
PC1	Utilities	28.0	0.50%	1.4	350	1.0	1,203	23.2	1.6	13.8%	6.1%
HDG	Utilities	27.8	0.70%	1.3	377	2.1	1,958	14.2	1.6	15.7%	11.8%
GEX	Utilities	21.0	0.70%	1.5	725	2.6	1,245	16.8	1.3	8.3%	7.0%
QTP	Utilities	14.0	0.00%	0.6	-	0.1	1,357	10.3	1.1	1.2%	11.2%
PLX	O&G	44.4	-0.60%	0.8	2,271	3.2	2,879	15.4	2.2	18.2%	13.8%
BSR	O&G	24.3	-0.40%	1.0	-	5.3	2,408	10.1	1.3	0.7%	13.4%
PLC	O&G	24.4	0.40%	1.5	79	0.1	734	33.3	1.6	0.5%	4.7%
ANV	Fishery	33.6	1.50%	1.6	180	0.8	114	296.0	1.6	1.0%	1.2%
PTB	Material	61.6	1.30%	0.9	166	0.8	4,899	12.6	1.5	24.9%	11.9%
VSC	Logistics	17.4	0.60%	1.3	201	0.8	713	24.4	1.1	3.1%	7.3%
HAH	Logistics	42.1	1.60%	1.3	206	7.1	2,800	15.0	1.8	7.7%	10.6%
VTP	Logistics	81.8	6.90%	1.6	401	9.6	2,893	28.3	6.2	6.9%	22.8%
DBC	Retail	30.2	3.10%	1.5	407	16.3	979	30.8	1.5	12.1%	5.0%
FRT	Retail	177.1	0.10%	0.8	971	3.7	(414)	-427.4	14.5	36.1%	11.8%
QNS	Retail	48.5	-0.20%	0.6	-	0.7	6,678	7.3	2.0	13.8%	28.7%
TNG	Textile	24.6	2.10%	1.3	121	1.1	2,254	10.9	1.5	19.5%	14.7%
PVT	Logistics	29.3	0.30%	1.1	420	2.8	2,805	10.4	1.5	13.2%	14.2%
DPM	Fertilizer	35.3	1.40%	1.3	556	2.4	1,703	20.7	1.2	8.8%	5.5%
REE	Utilities	65.6	0.00%	1.1	1,244	1.4	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

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