

STOCK MARKET

The VN-Index extended its decline, falling nearly 33 points to close at 1,813.14. Market breadth remained negative, with 10 out of 18 sectors declining. Real Estate led the losses, followed by Travel & Leisure. On the upside, Oil & Gas, Chemicals, and Utilities posted strong gains, driven by short-term impacts from the conflict in Iran. Regarding foreign flows, foreign investors were net sellers across all three exchanges—HSX, HNX, and UPCoM. Price action in the VN-Index has been relatively loose, and overall market sentiment remains subdued. Investors should therefore trade cautiously.

FUTURES CONTRACTS

Futures contracts declined in line with the movement of the VN30.

COVERED WARRANTS

During the trading session on 03/03/2026, covered warrants mostly decreased.

HIGHLIGHT

- VN-Index **-32.96** points, closing at **1813.14** points. HNX-Index **+1.01** points, closing at **260.01** points.
- Pulling the index up: **GAS (+4.46)**, **MCH (+2.93)**, **GVR (+2.72)**, **BSR (+2.66)**, **PLX (+1.26)**.
- Pulling the index down: **VIC (-18.18)**, **VHM (-5.78)**, **BID (-2.41)**, **VCB (-2.30)**, **TCB (-1.56)**.
- The matched trade value of VN-Index reached VND **40,219** billion, decreased **-7.85%** compared to the previous session. The total transaction value reached VND 43,813 billion.
- The trading range is 45.73 points. The market had **120** gainers, 53 remaining unchanged, **214** losers.
- Foreign investors' net selling value: VND **-787.18** billion on HOSE, including **HPG (VND -370.25 billion)**, **VHM (VND -253.07 billion)**, **VNM (VND -144.90 billion)**, **POW (VND -140.66 billion)**, **BSR (VND -129.15 billion)**. Foreign investors were net sellers on HNX with the value of VND **-21.81** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.98%**. Positive stocks: **DCM (+6.96%)**, **BSR (+6.90%)**, **PVS (+4.80%)**.
- BSC50 **-0.10%**. Positive stocks: **PLX (+6.96%)**, **GAS (+6.93%)**, **PVD (+6.90%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.98%	-0.10%	-1.79%	-2.56%
1 week	-1.96%	-0.08%	-2.92%	-4.46%
1 months	-0.24%	0.77%	-0.87%	-3.47%
3 months	6.62%	8.49%	4.70%	-0.64%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,813.14	260.01	129.06
% 1D	-1.79%	0.39%	0.27%
TV (VND bn)	40,219	2,874	1,677
%1D	-7.85%	-10.30%	-17.50%
Foreign (VND bn)	-787.18	-21.81	-4.81

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VPB	155.28	HPG	-370.25
SSI	144.76	VHM	-253.07
DCM	137.98	VNM	-144.90
PC1	91.37	POW	-140.66
HCM	84.87	BSR	-129.15

Source: FiinPro-X, BSC compiled

Overview of global stock markets

	%D	%W	
SPX	6,882	0.04%	0.64%
FTSE100	10,535	-2.28%	-1.36%
Eurostoxx	5,819	-2.71%	-4.97%
Shanghai	4,123	-1.43%	0.13%
Nikkei	56,279	-3.06%	-1.83%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	81.99	5.47%
Gold	5,298	-1.23%
Exchange rate		
USD/VND	26,298	0.03%
EUR/VND	31,437	-0.07%
JPY/VND	170	-0.58%
Interst rates		
10Y-Gov bond rate	4.09%	
1M-interbank rate	7.19%	

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)
GAS	123.40	6.93%	4.46	2.41
MCH	150.80	6.95%	2.93	1.29
GVR	45.75	6.89%	2.72	4.00
BSR	35.65	6.90%	2.66	5.01
PLX	66.10	6.96%	1.26	1.27

Top 5 leaders on the HNX

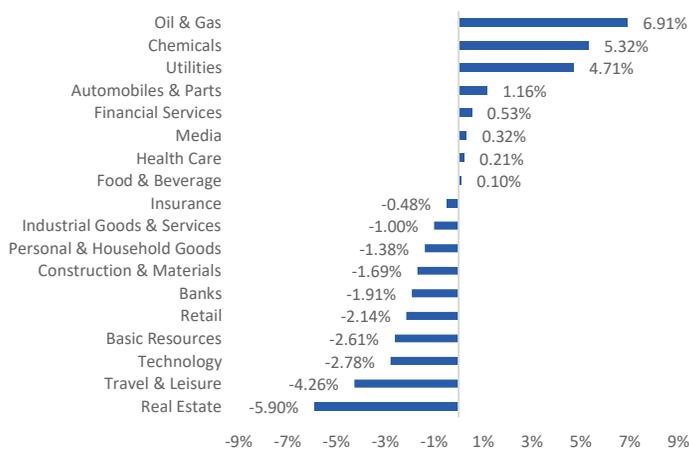
	Close	%	Index pt	Volume (mil)
PVS	54.60	4.80%	0.74	0.51
MBS	26.90	1.51%	0.15	0.67
DTK	11.80	2.61%	0.12	0.68
SHS	18.30	1.10%	0.10	0.90
PVC	20.50	9.63%	0.09	0.08

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
PIT	8.11	6.99%	0.00	0.03
VOS	17.60	6.99%	0.04	9.21
DCM	49.15	6.96%	0.39	14.01
PAC	25.35	6.96%	0.03	1.06
PLX	66.10	6.96%	1.27	17.82

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
VC1	12.20	9.91%	0.06	0.00
PEN	10.00	9.89%	0.02	0.00
VMS	60.10	9.87%	0.21	0.00
HLC	13.40	9.84%	0.13	0.16
MDC	11.30	9.71%	0.09	0.07

Figure 1
Sectors performance

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VIC	155.50	-7.00%	-18.18	7.73
VHM	93.50	-6.97%	-5.78	4.11
BID	43.55	-3.65%	-2.41	7.02
VCB	61.60	-2.07%	-2.30	8.36
TCB	33.60	-3.03%	-1.56	7.09

Top 5 laggards on the HNX

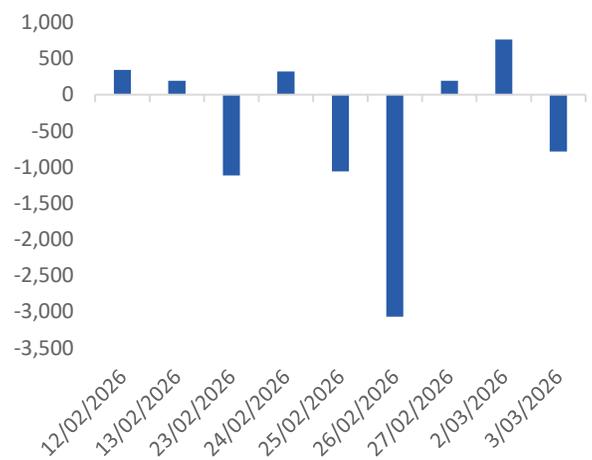
	Close	%	Index pt	Volume (mil)
KSV	194.90	-3.18%	-0.69	0.20
IDC	48.40	-2.42%	-0.25	0.38
KSF	78.70	-0.38%	-0.15	0.90
HUT	15.80	-1.25%	-0.12	1.07
NFC	62.10	-8.54%	-0.05	0.02

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
VIC	155.50	-7.00%	-18.16	14.92
MDG	42.55	-6.99%	-0.01	0.00
CMV	7.98	-6.99%	0.00	0.01
VHM	93.50	-6.97%	-5.79	11.99
FIR	5.38	-6.92%	-0.01	0.54

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
ALT	11.70	-8.59%	-0.02	0.00
NFC	62.10	-8.54%	-0.33	0.00
NAP	10.30	-8.04%	-0.07	0.00
UNI	8.00	-6.98%	-0.09	0.00
VDL	9.80	-6.67%	-0.04	0.00

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	88.2	-2.0%	1.0	129,515	1214.1	4,777	18.5	113,000	47.6%	Link
KBC	Real Estate	34.0	-3.0%	1.4	31,973	211.6	2,500	13.6	46,000	11.1%	Link
KDH	Real Estate	27.3	0.6%	0.9	30,636	128.2	943	29.0	39,900	28.2%	Link
PDR	Real Estate	15.6	0.0%	1.3	15,566	186.7	531	29.4	28,200	6.9%	Link
VHM	Real Estate	93.5	-7.0%	1.6	384,043	1138.6	10,008	9.3	119,600	8.1%	Link
FPT	Technology	87.0	-2.9%	0.6	148,205	1618.1	5,511	15.8	124,400	35.3%	Link
BSR	Oil & Gas	35.7	6.9%	0.0	178,510	1714.6	1,036	34	23,200	2.2%	Link
PVS	Oil & Gas	54.6	4.8%	1.4	27,924	1047.6	3,560	15.3	52,300	16.5%	Link
HCM	Financial Services	23.9	2.4%	1.3	25,811	353.4	1,454	16.4		33.7%	Link
SSI	Financial Services	32.6	2.4%	1.3	81,210	2325.5	2,004	16.3		32.4%	Link
VCI	Financial Services	38.2	-0.8%	1.1	32,474	721.4	1,849	20.7		17.7%	Link
DCM	Chemicals	49.2	7.0%	0.8	26,020	671.3	3,702	13.3	40,200	5.6%	Link
DGC	Chemicals	73.8	-2.0%	0.7	28,028	322.0	7,965	9.3	109,300	7.9%	Link
ACB	Banks	23.5	-1.9%	0.8	120,711	398.3	3,042	7.7	27,100	27.2%	Link
CTG	Banks	35.9	-2.6%	1.0	278,833	812.4	4,454	8.1	53,500	25.4%	Link
HDB	Banks	26.5	-1.7%	1.2	132,640	522.9	3,432	7.7	32,700	22.9%	Link
MBB	Banks	27.1	-2.2%	0.9	217,888	1226.6	3,325	8.1	33,000	23.2%	Link
MSB	Banks	11.7	-2.1%	0.9	36,348	102.3	1,804	6.5	14,000	29.2%	Link
STB	Banks	67.8	1.2%	0.8	127,818	801.1	3,150	21.5		14.6%	Link
TCB	Banks	33.6	-3.0%	1.0	238,098	858.4	3,577	9.4	43,500	22.5%	Link
TPB	Banks	17.6	-1.1%	1.0	48,823	472.9	2,660	6.6	-	24.7%	Link
VCB	Banks	61.6	-2.1%	0.9	514,710	791.1	4,210	14.6	75,800	20.6%	Link
VIB	Banks	16.7	-1.2%	0.9	56,847	169.7	2,143	7.8	23,000	4.8%	Link
VPB	Banks	27.5	-2.1%	1.4	217,786	691.9	3,024	9.1	36,500	24.9%	Link
HPG	Basic Resources	27.7	-2.8%	0.9	212,610	1957.1	2,013	13.8	32,200	22.4%	Link
HSG	Basic Resources	15.5	-1.3%	1.2	9,625	78.6	1,012	15.3	15,700	4.5%	Link
DBC	Food & Beverage	25.1	-2.5%	0.8	9,660	215.7	3,915	6.4	28,800	1.6%	Link
MSN	Food & Beverage	77.0	-1.8%	1.1	111,335	845.1	2,710	28.4	98,300	23.2%	Link
VNM	Food & Beverage	63.4	-4.8%	0.6	132,503	1210.1	4,503	14.1	78,000	50.3%	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	46.0	-5.65%	1.2	10,163	350.5	2,494	18.4	20.15%	17.1%	Link
FRT	Retail	165.0	-2.37%	1.0	28,100	107.6	4,667	35.4	32.75%	26.1%	Link
BVH	Insurance	81.6	-0.61%	1.0	60,574	48.6	3,996	20.4	27.22%	12.6%	Link
DIG	Real Estate	14.1	0.36%	1.1	11,190	254.0	990	14.2	2.73%	7.3%	Link
DXG	Real Estate	14.6	0.00%	1.3	16,185	228.1	229	63.7	22.11%	1.9%	Link
HDC	Real Estate	19.1	-1.80%	1.2	3,815	92.6	2,559	7.5	1.67%	24.9%	Link
HDG	Real Estate	27.4	-2.32%	1.3	10,118	81.3	1,907	14.3	19.22%	10.9%	Link
IDC	Real Estate	48.4	-2.42%	1.4	18,368	214.0	5,090	9.5	13.98%	32.0%	Link
NLG	Real Estate	26.0	-1.89%	1.1	12,588	145.0	1,805	14.4	42.11%	6.3%	Link
SIP	Real Estate	60.0	-3.23%	1.1	14,527	31.4	5,601	10.7	2.70%	28.5%	Link
SZC	Real Estate	33.3	-3.48%	1.2	5,994	41.5	1,917	17.4	4.98%	10.9%	Link
TCH	Real Estate	14.4	-1.37%	1.3	13,134	98.6	416	34.6	10.37%	3.0%	Link
VIC	Real Estate	155.5	-7.00%	1.0	1,198,288	2346.2	1,739	89.4	2.79%	9.4%	Link
VRE	Real Estate	26.4	-5.22%	1.5	59,876	259.9	2,837	9.3	11.54%	14.3%	Link
CMG	Technology	32.5	-2.11%	0.8	7,558	20.3	1,700	19.1	38.09%	13.1%	Link
PLX	Oil & Gas	66.1	6.96%	0.8	83,986	1125.3	2,122	31.2	15.35%	10.3%	Link
PVD	Oil & Gas	44.2	6.90%	1.0	24,542	882.4	1,866	23.7	12.60%	6.4%	Link
FTS	Financial Services	31.9	1.92%	0.9	11,053	26.6	1,161	27.5	24.89%	9.3%	Link
MBS	Financial Services	26.9	1.51%	1.5	17,950	206.9	1,884	14.3	0.52%	15.2%	Link
GAS	Utilities	123.4	6.93%	0.8	297,758	911.0	4,730	26.1	2.30%	18.0%	Link
POW	Utilities	16.6	6.77%	0.9	50,773	1160.7	832	19.9	4.90%	7.1%	Link
REE	Utilities	64.5	0.31%	0.5	34,937	69.3	4,668	13.8	49.00%	12.7%	Link
VJC	Travel & Leisure	164.1	-2.90%	1.0	97,083	200.3	3,728	44.0	6.54%	10.1%	Link
GEX	Industrial Goods & Services	37.5	-0.40%	1.6	33,840	369.0	1,635	22.9	8.00%	9.3%	Link
GMD	Industrial Goods & Services	81.5	0.62%	0.9	34,759	380.1	3,986	20.5	40.79%	13.2%	Link
HAH	Industrial Goods & Services	71.0	5.81%	0.8	11,989	720.1	6,258	11.3	7.67%	31.0%	Link
PVT	Industrial Goods & Services	27.5	6.81%	0.9	12,900	607.7	2,210	12.4	10.60%	12.7%	Link
VTP	Industrial Goods & Services	101.1	-2.03%	0.9	12,312	69.6	3,325	30.4	5.35%	24.1%	Link
PNJ	Personal & Household Goods	122.0	-2.01%	0.7	41,620	242.0	8,353	14.6	48.21%	23.1%	Link
TCM	Personal & Household Goods	26.2	0.77%	0.8	2,935	41.3	2,402	10.9	48.48%	11.5%	Link
TNG	Personal & Household Goods	26.0	1.96%	1.3	3,347	127.6	3,163	8.2	18.60%	20.1%	Link
DPM	Chemicals	31.4	6.27%	0.9	21,316	664.3	1,579	19.9	5.46%	9.6%	Link
GVR	Chemicals	45.8	6.89%	1.6	183,000	510.7	1,406	32.5	0.78%	10.3%	Link
EIB	Banks	22.8	0.44%	1.4	42,470	602.5	610	37.4	3.57%	4.5%	Link
LPB	Banks	42.4	1.19%	0.7	126,661	56.2	3,824	11.1	0.79%	25.2%	Link
NAB	Banks	13.9	-1.07%	0.5	23,762	19.2	2,438	5.7	1.43%	19.6%	Link
OCB	Banks	11.4	-0.44%	0.8	30,226	22.3	1,513	7.5	19.62%	12.3%	Link
NKG	Basic Resources	15.4	-1.28%	1.2	6,893	115.4	461	33.4	5.55%	2.9%	Link
ANV	Food & Beverage	26.1	-3.52%	1.1	6,936	50.0	3,754	6.9	3.29%	31.6%	Link
BAF	Food & Beverage	37.0	0.27%	0.7	11,234	135.2	341	108.3	4.28%	2.8%	Link
SAB	Food & Beverage	46.0	-2.54%	0.6	58,998	114.3	3,449	13.3	58.36%	19.9%	Link
VHC	Food & Beverage	62.8	-2.18%	0.9	14,096	133.8	6,073	10.3	20.31%	15.0%	Link
BMP	Construction & Materials	157.1	-1.01%	0.2	12,860	12.3	15,010	10.5	83.79%	44.1%	Link
CTD	Construction & Materials	86.3	-1.93%	0.8	9,191	79.9	7,388	11.7	48.96%	8.7%	Link
CTR	Construction & Materials	88.1	-3.82%	1.0	10,077	119.4	5,244	16.8	5.36%	30.5%	Link
DPG	Construction & Materials	43.6	-3.11%	0.9	5,170	64.4	3,209	13.6	11.61%	15.6%	Link
HHV	Construction & Materials	12.1	0.00%	1.1	6,593	72.6	1,196	10.1	10.33%	5.9%	Link
PC1	Construction & Materials	31.4	2.96%	1.0	12,894	421.6	2,553	12.3	15.45%	17.4%	Link
VCG	Construction & Materials	19.0	1.34%	1.1	12,251	101.8	6,084	3.1	2.87%	39.8%	Link
VGC	Construction & Materials	49.9	-4.13%	1.2	22,350	72.9	3,130	15.9	2.61%	16.5%	Link

Source: FiiPro-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, Logistics, 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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