

STOCK MARKET

The market traded sideways above the 1,830 level throughout the morning session before selling pressure intensified, pushing the VN-Index down to trade within the 1,805–1,825 range. By the close, the VN-Index finished at 1,808.51, reduced nearly 10 points from the previous session. Market breadth was negative, with 14 out of 18 sectors declining. The Oil & Gas and Chemicals sectors reversed sharply after a strong rally in previous sessions. On the upside, the Real Estate sector posted the strongest gains. Regarding foreign trading activity, foreign investors were net sellers across all three exchanges; HSX, HNX, and UPCoM, particularly with net selling of more than VND 3 trillion on the HSX. Market sentiment remains unstable, and investors should trade cautiously in the current environment. The VN-Index is currently testing the SMA20 and SMA50 support levels.

FUTURES CONTRACTS

The futures contracts tended to decline in line with the movement of the VN30.

COVERED WARRANTS

During the trading session on 05/03/2026, covered warrants mostly fluctuated strugglingly.

HIGHLIGHT

- VN-Index **-9.76** points, closing at **1808.51** points. HNX-Index **-0.26** points, closing at **257.59** points.
- Pulling the index up: **VIC (+16.07)**, **VHM (+1.33)**, **VPL (+0.47)**, **ACB (+0.39)**, **GEL (+0.20)**.
- Pulling the index down: **GAS (-4.31)**, **MCH (-2.57)**, **GVR (-2.42)**, **BSR (-2.26)**, **BID (-1.75)**.
- The matched trade value of VN-Index reached VND **34,268** billion, decreased **-23.81%** compared to the previous session. The total transaction value reached VND 35,422 billion.
- The trading range is 40.94 points. The market had **153** gainers, 51 remaining unchanged, **185** losers.
- Foreign investors' net selling value: VND **-3117.49** billion on HOSE, including **FPT (VND -573.08 billion)**, **HPG (VND -289.83 billion)**, **VHM (VND -225.08 billion)**, **SSI (VND -184.16 billion)**, **PVD (VND -140.18 billion)**. Foreign investors were net sellers on HNX with the value of VND **-109.87** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.99%**. Positive stocks: **KDH (+1.90%)**, **VHM (+1.60%)**, **ACB (+1.51%)**.
- BSC50 **-1.54%**. Positive stocks: **VIC (+5.91%)**, **VCG (+2.87%)**, **GEX (+2.57%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.99%	-1.54%	-0.54%	-0.70%
1 week	-3.37%	-2.88%	-3.78%	-6.14%
1 months	-0.24%	-0.18%	-0.27%	-2.75%
3 months	5.78%	6.17%	3.86%	-1.66%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,808.51	257.59	127.90
% 1D	-0.54%	-0.10%	0.53%
TV (VND bn)	34,268	3,823	1,011
%1D	-23.81%	22.87%	-50.25%
Foreign (VND bn)	-3117.49	-109.87	-0.80

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
KDH	123.64	FPT	-573.08
DPM	67.76	HPG	-289.83
TCX	30.83	VHM	-225.08
DGW	25.84	SSI	-184.16
MBB	21.08	PVD	-140.18

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	6,870	0.78%	-1.10%
FTSE100	10,571	0.03%	-2.54%
Eurostoxx	5,853	-0.06%	-5.00%
Shanghai	4,109	0.64%	-0.92%
Nikkei	55,278	1.90%	-6.09%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	83.93	4.53%
Gold	5,169	-0.28%
Exchange rate		
USD/VND	26,307	0.01%
EUR/VND	31,312	0.46%
JPY/VND	171	0.59%

Interest rates	
10Y-Gov bond rate	4.11%
1M-interbank rate	7.78%

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)
VIC	164.80	5.91%	16.07	7.73
VHM	95.00	1.60%	1.33	4.11
VPL	75.50	1.62%	0.47	1.79
ACB	23.55	1.51%	0.39	5.14
GEL	35.60	2.89%	0.20	0.89

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
SHS	19.70	4.79%	0.48	0.90
MBS	28.50	2.15%	0.23	0.67
HUT	15.90	1.92%	0.18	1.07
PMC	155.00	8.01%	0.07	0.01
IPA	18.00	2.86%	0.06	0.21

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
HRC	63.30	6.93%	0.03	0.00
PIT	9.27	6.92%	0.00	0.02
ORS	14.75	6.88%	0.14	15.22
PLP	5.63	6.83%	0.01	0.06
HU1	6.31	6.77%	0.00	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
NHC	22.30	8.78%	0.02	0.00
HJS	29.30	8.52%	0.21	0.00
SJ1	12.90	8.40%	0.19	0.00
PMC	155.00	8.01%	0.46	0.00
CAN	29.90	7.17%	0.04	0.00

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
GAS	119.70	-6.99%	-4.31	2.41
MCH	150.10	-6.19%	-2.57	1.29
GVR	40.55	-7.00%	-2.42	4.00
BSR	35.60	-5.94%	-2.26	5.01
BID	44.40	-2.63%	-1.75	7.02

Top 5 laggards on the HNX

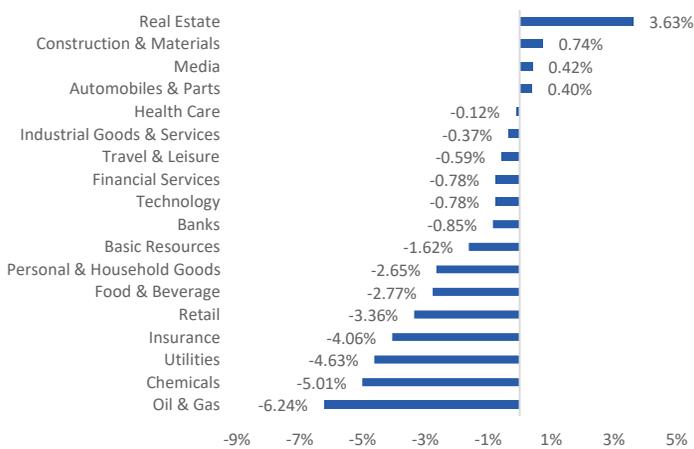
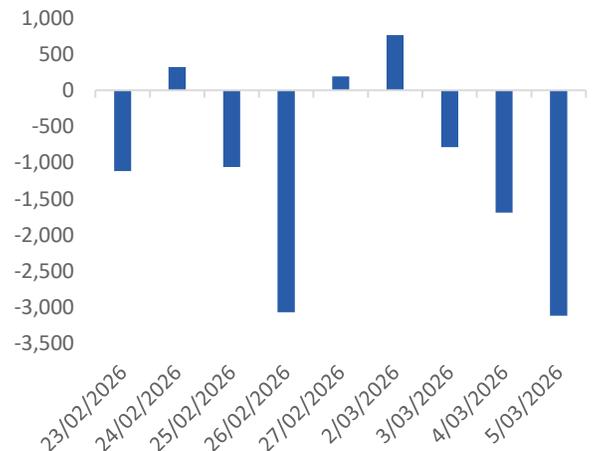
	Close	%	Index pt	Volume (mil)
PVS	51.00	-1.92%	-0.28	0.51
IDC	44.80	-2.82%	-0.27	0.38
KSF	78.00	-0.64%	-0.25	0.90
KSV	174.00	-0.91%	-0.18	0.20
PGS	49.40	-9.69%	-0.13	0.05

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
GVR	40.55	-7.00%	-2.43	7.90
GAS	119.70	-6.99%	-4.32	5.40
HTV	11.35	-6.97%	0.00	0.01
PLX	64.70	-6.91%	-1.21	10.26
TNC	28.90	-6.77%	-0.01	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
VLA	9.10	-9.90%	-0.01	0.00
SGH	24.80	-9.82%	-0.12	0.00
PJC	27.90	-9.71%	-0.08	0.00
PGS	49.40	-9.69%	-0.95	0.00
MEL	7.60	-9.52%	-0.04	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	85.2	-4.1%	1.2	130,396	980.6	4,777	18.6	113,000	47.7%	Link
KBC	Real Estate	33.1	0.9%	1.1	30,890	190.9	2,500	13.1	46,000	11.2%	Link
KDH	Real Estate	26.8	1.9%	1.1	29,458	243.4	943	27.9	39,900	28.7%	Link
PDR	Real Estate	15.7	0.3%	1.4	15,566	197.9	531	29.4	28,200	6.6%	Link
VHM	Real Estate	95.0	1.6%	1.5	384,043	881.0	10,008	9.3	119,600	8.1%	Link
FPT	Technology	84.4	-0.8%	0.7	144,968	1483.7	5,511	15.4	124,400	34.8%	Link
BSR	Oil & Gas	35.6	-5.9%	0.0	189,526	1013.4	1,036	37	23,200	2.2%	Link
PVS	Oil & Gas	51.0	-1.9%	1.3	26,594	1240.3	3,560	14.6	52,300	16.4%	Link
HCM	Financial Services	24.5	-0.4%	1.1	26,567	619.7	1,454	16.9	-	34.3%	Link
SSI	Financial Services	33.5	-0.6%	1.0	83,950	2902.2	2,003	16.8	-	32.7%	Link
VCI	Financial Services	40.5	-0.9%	0.8	34,727	846.5	1,849	22.1	-	18.5%	Link
DCM	Chemicals	47.7	-4.6%	1.0	26,470	346.8	3,702	13.5	40,200	6.7%	Link
DGC	Chemicals	71.0	0.1%	1.1	26,926	198.8	7,965	8.9	109,300	8.0%	Link
ACB	Banks	23.6	1.5%	0.8	119,170	232.8	3,042	7.6	27,100	27.2%	Link
CTG	Banks	36.2	-0.6%	1.0	282,717	294.0	4,454	8.2	53,500	25.3%	Link
HDB	Banks	26.0	-1.5%	1.1	131,889	498.3	3,432	7.7	32,700	22.9%	Link
MBB	Banks	27.1	0.4%	1.0	217,082	483.1	3,325	8.1	33,000	23.2%	Link
MSB	Banks	11.6	-0.4%	1.0	36,348	50.2	1,804	6.5	14,000	29.1%	Link
STB	Banks	64.9	-2.7%	0.9	125,744	833.2	3,150	21.2	-	14.5%	Link
TCB	Banks	32.2	-0.9%	1.1	230,303	517.0	3,577	9.1	43,500	22.5%	Link
TPB	Banks	17.1	-1.5%	1.1	47,991	325.0	2,660	6.5	-	24.8%	Link
VCB	Banks	62.5	-0.8%	0.8	526,408	392.7	4,210	15.0	75,800	20.6%	Link
VIB	Banks	16.9	0.0%	0.8	57,357	69.0	2,143	7.9	23,000	4.7%	Link
VPB	Banks	27.0	-0.6%	1.1	215,406	589.5	3,024	9.0	36,500	25.0%	Link
HPG	Basic Resources	27.3	-1.6%	0.9	212,610	1323.5	2,013	13.8	32,200	22.6%	Link
HSG	Basic Resources	15.0	-1.0%	1.0	9,408	54.6	1,012	15.0	15,700	4.4%	Link
DBC	Food & Beverage	25.1	0.4%	1.0	9,602	108.2	3,915	6.4	28,800	1.7%	Link
MSN	Food & Beverage	75.3	-0.9%	1.0	109,890	463.7	2,710	28.1	98,300	23.2%	Link
VNM	Food & Beverage	63.2	-2.6%	0.6	135,638	584.0	4,503	14.4	78,000	48.6%	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	0.00%	1.2	10,174	168.5	2,494	18.4	20.42%	17.1%	Link
FRT	Retail	159.0	-2.93%	0.9	27,895	129.2	4,667	35.1	32.50%	26.1%	Link
BVH	Insurance	76.0	-5.00%	1.2	59,386	52.1	3,996	20.0	27.24%	12.6%	Link
DIG	Real Estate	13.8	-2.14%	1.2	11,190	173.7	990	14.2	2.35%	7.3%	Link
DXG	Real Estate	14.1	-3.09%	1.1	16,185	320.8	229	63.7	21.11%	1.9%	Link
HDC	Real Estate	18.6	0.27%	1.1	3,695	42.1	2,559	7.2	1.48%	24.9%	Link
HDG	Real Estate	28.3	-1.39%	1.2	10,618	64.7	1,907	15.1	19.46%	10.9%	Link
IDC	Real Estate	44.8	-2.82%	1.4	17,495	161.4	5,090	9.1	13.81%	32.0%	Link
NLG	Real Estate	25.6	-0.39%	1.2	12,467	89.2	1,805	14.2	41.43%	6.3%	Link
SIP	Real Estate	58.0	-1.86%	1.0	14,309	19.2	5,601	10.6	2.76%	28.5%	Link
SZC	Real Estate	31.5	-2.02%	0.9	5,787	29.4	1,917	16.8	5.00%	10.9%	Link
TCH	Real Estate	14.0	0.00%	1.3	12,724	68.4	416	33.6	10.18%	3.0%	Link
VIC	Real Estate	164.8	5.91%	1.6	1,199,058	926.2	1,739	89.5	2.79%	9.4%	Link
VRE	Real Estate	27.0	-3.57%	1.4	63,625	193.8	2,837	9.9	11.60%	14.3%	Link
CMG	Technology	31.9	-0.16%	1.1	7,430	11.3	1,700	18.8	38.05%	13.1%	Link
PLX	Oil & Gas	64.7	-6.91%	0.7	88,306	685.6	2,122	32.8	15.30%	10.3%	Link
PVD	Oil & Gas	42.3	-6.11%	0.8	25,015	678.3	1,866	24.1	12.63%	6.4%	Link
FTS	Financial Services	32.0	0.79%	1.1	10,984	75.1	1,161	27.3	24.88%	9.3%	Link
MBS	Financial Services	28.5	2.15%	1.7	18,617	637.3	1,884	14.8	0.65%	15.2%	Link
GAS	Utilities	119.7	-6.99%	0.8	310,547	666.4	4,730	27.2	2.27%	18.0%	Link
POW	Utilities	15.2	-1.94%	0.9	47,398	559.5	832	18.6	4.47%	7.1%	Link
REE	Utilities	63.5	-1.55%	0.7	34,937	50.0	4,668	13.8	49.00%	12.7%	Link
VJC	Travel & Leisure	156.4	-4.17%	0.7	96,551	250.5	3,728	43.8	6.52%	10.1%	Link
GEX	Industrial Goods & Services	36.0	2.57%	1.2	31,629	402.7	1,695	20.7	7.89%	9.3%	Link
GMD	Industrial Goods & Services	77.3	-2.15%	1.0	33,693	216.1	3,986	19.8	40.83%	13.2%	Link
HAH	Industrial Goods & Services	63.6	-5.07%	0.7	11,314	388.8	6,258	10.7	7.16%	31.0%	Link
PVT	Industrial Goods & Services	28.7	-2.21%	0.8	13,792	788.1	2,210	13.3	10.99%	12.7%	Link
VTP	Industrial Goods & Services	100.6	0.10%	0.8	12,239	43.7	3,325	30.2	5.36%	24.1%	Link
PNJ	Personal & Household Goods	116.0	-4.05%	0.8	41,245	280.0	8,353	14.5	48.63%	23.1%	Link
TCM	Personal & Household Goods	26.1	-0.57%	0.7	2,935	35.1	2,402	10.9	48.43%	11.5%	Link
TNG	Personal & Household Goods	25.4	-5.22%	1.4	3,450	65.3	3,163	8.5	20.88%	20.1%	Link
DPM	Chemicals	30.5	-0.33%	0.9	20,806	593.2	1,579	19.4	5.55%	9.6%	Link
GVR	Chemicals	40.6	-7.00%	1.2	174,400	327.8	1,406	31.0	0.75%	10.3%	Link
EIB	Banks	22.4	-0.67%	1.2	41,911	365.2	610	36.9	3.63%	4.5%	Link
LPB	Banks	42.9	-0.58%	0.4	128,752	253.1	3,824	11.3	0.76%	25.2%	Link
NAB	Banks	13.7	0.00%	0.5	23,419	17.9	2,438	5.6	1.42%	19.6%	Link
OCB	Banks	11.2	0.00%	0.9	29,826	13.0	1,513	7.4	19.58%	12.3%	Link
NKG	Basic Resources	14.7	-2.00%	1.0	6,714	91.1	461	32.5	5.58%	2.9%	Link
ANV	Food & Beverage	25.6	-2.48%	1.1	6,976	41.4	3,754	7.0	3.27%	31.6%	Link
BAF	Food & Beverage	37.1	-0.13%	0.6	11,294	43.5	341	108.9	4.32%	2.8%	Link
SAB	Food & Beverage	45.7	-0.76%	0.8	58,998	35.4	3,449	13.3	58.38%	19.9%	Link
VHC	Food & Beverage	60.7	-2.10%	0.9	13,916	138.2	6,073	10.2	20.45%	15.0%	Link
BMP	Construction & Materials	152.0	0.40%	0.5	12,394	29.7	15,010	10.1	83.70%	44.1%	Link
CTD	Construction & Materials	80.6	-3.82%	1.0	8,925	93.9	7,388	11.3	48.98%	8.7%	Link
CTR	Construction & Materials	87.0	0.23%	1.0	9,929	41.0	5,244	16.6	5.46%	30.5%	Link
DPG	Construction & Materials	45.5	-0.66%	1.0	5,431	41.3	3,207	14.3	11.52%	15.6%	Link
HHV	Construction & Materials	12.0	0.84%	1.1	6,511	57.8	1,196	10.0	10.20%	5.9%	Link
PC1	Construction & Materials	29.0	-0.68%	0.8	12,010	435.9	2,553	11.4	16.28%	17.4%	Link
VCG	Construction & Materials	19.7	2.87%	1.0	12,380	267.2	6,084	3.2	3.12%	39.8%	Link
VGC	Construction & Materials	47.3	0.53%	1.2	21,095	47.4	3,130	15.0	2.59%	16.5%	Link

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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