

STOCK MARKET

The VN-Index rebounded by nearly 24 points, closing at 1,614.77 today. Market breadth was broadly positive, with 17 out of 18 sectors advancing, led by Insurance, followed by Automobiles & Parts and Retail. In terms of foreign investor activity, net selling was recorded on the HSX, while net buying occurred on the HNX and UPCOM. The market appears to be testing for a short-term bottom following the recent correction, and investors are advised to trade cautiously.

FUTURES CONTRACTS

All future contracts rose with the movement of VN30.

COVERED WARRANTS

During the trading session on 24/03/2026, covered warrants mostly recovery.

HIGHLIGHT

- VN-Index **+23.60** points, closing at **1614.77** points. HNX-Index **+6.27** points, closing at **243.81** points.
- Pulling the index up: **VPB (+2.19)**, **CTG (+1.77)**, **TCB (+1.46)**, **VCB (+1.06)**, **MBB (+1.04)**.
- Pulling the index down: **VIC (-2.56)**, **PLX (-0.31)**, **TCX (-0.10)**, **PGV (-0.09)**, **PVD (-0.09)**.
- The matched trade value of VN-Index reached VND **17,929** billion, decreased **-31.37%** compared to the previous session. The total transaction value reached VND 20,515 billion.
- The trading range is 27.71 points. The market had **273** gainers, 48 remaining unchanged, **59** losers.
- Foreign investors' net selling value: VND **-582.21** billion on HOSE, including **VIC (VND -148.05 billion)**, **MWG (VND -147.19 billion)**, **VHM (VND -137.95 billion)**, **HPG (VND -135.64 billion)**, **BID (VND -124.78 billion)**. Foreign investors were net buyers on HNX with the value of VND **92.52** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+2.38%**. Positive stocks: **VPB (+5.21%)**, **TPB (+4.64%)**, **PDR (+4.48%)**.
- BSC50 **+2.48%**. Positive stocks: **BVH (+6.92%)**, **NLG (+6.82%)**, **TCH (+6.69%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	2.38%	2.48%	1.48%	1.67%
1 week	-4.64%	-3.78%	-5.59%	-5.52%
1 months	-12.24%	-11.38%	-11.48%	-12.31%
3 months	-4.69%	-2.52%	-9.43%	-12.50%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,614.77	243.81	122.73
% 1D	1.48%	2.64%	1.16%
TV (VND bn)	17,929	1,082	436
%1D	-31.37%	-27.95%	-45.27%
Foreign (VND bn)	-582.21	92.52	4.11

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
BSR	156.40	VIC	-148.05
VCK	115.22	MWG	-147.19
VCI	107.13	VHM	-137.95
FRT	71.03	HPG	-135.64
DGC	57.28	BID	-124.78

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	6,581	1.15%	-1.77%
FTSE100	9,880	-0.14%	-5.03%
Eurostoxx	5,550	-1.85%	-4.27%
Shanghai	3,881	1.78%	-4.16%
Nikkei	52,253	1.56%	-2.66%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	101.54	5.57%
Gold	4,415	-0.41%
Exchange rate		
USD/VND	26,364	0.08%
EUR/VND	31,319	0.48%
JPY/VND	170	0.59%

	Close	%
Interest rates		
10Y-Gov bond rate	4.33%	
1M-interbank rate	7.48%	

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)
VPB	25.25	5.21%	2.19	31.36
CTG	33.55	3.23%	1.77	6.42
TCB	29.85	3.29%	1.46	10.99
VCB	58.20	1.04%	1.06	4.35
MBB	25.60	2.40%	1.04	27.65

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSF	82.00	5.13%	2.09	0.03
IDC	44.70	5.42%	0.51	1.64
CEO	15.70	9.79%	0.48	12.97
NVB	10.70	3.88%	0.44	0.13
KSV	135.60	2.49%	0.37	0.03

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
HVN	20.65	6.99%	0.94	1.23
ABR	12.30	6.96%	0.00	0.00
HHS	11.55	6.94%	0.07	5.53
PET	42.35	6.94%	0.07	5.92
PAC	26.20	6.94%	0.03	1.67

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
HTC	41.00	9.92%	0.25	0.00
SPC	8.90	9.88%	0.03	0.00
CEO	15.70	9.79%	3.22	12.97
VC6	26.20	9.62%	0.10	0.00
PDB	22.90	9.57%	0.07	0.01

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VIC	124.00	-1.27%	-2.56	3.94
PLX	39.80	-2.93%	-0.31	8.83
TCX	50.60	-0.39%	-0.10	4.03
PGV	23.60	-1.67%	-0.09	0.02
PVD	33.50	-2.33%	-0.09	5.58

Top 5 laggards on the HNX

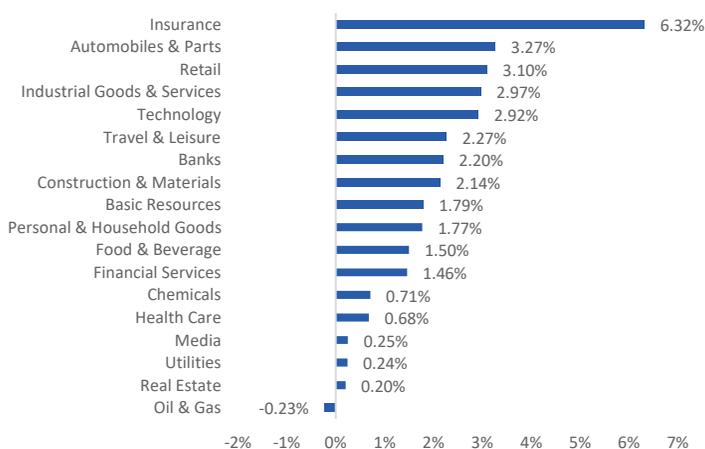
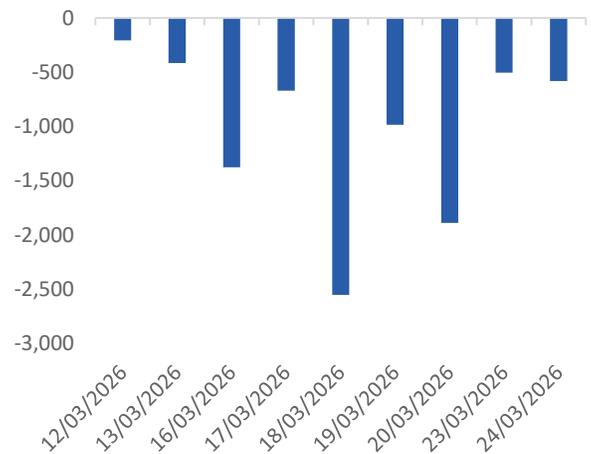
	Close	%	Index pt	Volume (mil)
SCG	64.20	-1.23%	-0.04	0.02
NFC	60.60	-5.90%	-0.03	0.00
MVB	16.30	-2.98%	-0.03	0.00
VMS	54.00	-10.00%	-0.03	0.00
VIF	15.30	-0.65%	-0.02	0.01

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HRC	61.80	-6.93%	-0.03	0.00
NO1	6.06	-6.91%	0.00	0.12
HNA	21.90	-6.81%	-0.07	0.00
PMG	6.99	-6.80%	0.00	0.00
FUEIP100	11.17	-6.13%	0.00	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
HMH	21.20	-9.79%	-0.11	0.00
HCC	26.00	-9.72%	-0.06	0.00
PGN	6.50	-9.72%	-0.02	0.03
NHC	23.50	-9.62%	-0.03	0.00
FID	2.00	-9.09%	-0.02	0.37

**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	76.0	2.4%	1.1	111,600	792.4	4,775	15.9	113,000	48.9%	Link
KBC	Real Estate	27.7	2.2%	1.4	26,040	185.0	2,450	11.3	46,000	10.5%	Link
KDH	Real Estate	25.0	4.2%	0.9	28,055	139.5	943	26.5	39,900	29.1%	Link
PDR	Real Estate	15.2	4.5%	1.2	15,117	191.0	531	28.5	28,200	6.6%	Link
VHM	Real Estate	99.0	1.0%	1.5	406,634	349.7	10,008	9.9	119,600	7.7%	Link
FPT	Technology	75.4	3.2%	0.7	128,444	484.4	5,515	13.7	124,400	33.4%	Link
BSR	Oil & Gas	26.4	1.2%	0.0	132,193	527.9	1,036	25	23,200	1.9%	Link
PVS	Oil & Gas	41.0	1.2%	1.6	20,968	194.1	3,560	11.5	52,300	15.0%	Link
HCM	Financial Services	19.8	3.4%	1.3	21,329	139.0	1,454	13.6	-	34.0%	Link
SSI	Financial Services	25.9	2.0%	1.2	64,519	775.5	1,981	13.1	-	31.7%	Link
VCI	Financial Services	34.0	2.3%	1.1	28,903	327.5	1,849	18.4	-	18.9%	Link
DCM	Chemicals	45.4	2.4%	0.5	24,008	176.5	3,702	12.3	40,200	8.4%	Link
DGC	Chemicals	52.5	1.6%	0.8	19,938	372.4	7,965	6.6	109,300	7.3%	Link
ACB	Banks	23.1	2.7%	0.7	118,657	321.3	3,042	7.6	27,100	27.4%	Link
CTG	Banks	33.6	3.2%	0.9	260,581	214.7	4,454	7.5	53,500	25.3%	Link
HDB	Banks	24.3	0.0%	1.2	121,628	501.6	3,432	7.1	32,700	22.8%	Link
MBB	Banks	25.6	2.4%	0.8	206,208	713.4	3,325	7.7	33,000	23.2%	Link
MSB	Banks	11.3	2.7%	0.9	35,100	31.4	1,804	6.2	14,000	29.1%	Link
STB	Banks	60.8	1.3%	0.8	114,621	666.1	3,150	19.3	-	13.2%	Link
TCB	Banks	29.9	3.3%	1.0	211,524	326.3	3,577	8.3	43,500	22.5%	Link
TPB	Banks	15.8	4.6%	1.0	43,830	311.9	2,660	5.9	-	24.4%	Link
VCB	Banks	58.2	1.0%	0.8	486,300	253.9	4,210	13.8	75,800	20.5%	Link
VIB	Banks	16.7	2.5%	0.8	56,847	165.5	2,143	7.8	23,000	4.9%	Link
VPB	Banks	25.3	5.2%	1.3	200,332	786.5	3,024	8.4	36,500	24.9%	Link
HPG	Basic Resources	26.0	1.8%	0.8	199,178	742.6	2,013	12.9	32,200	22.4%	Link
HSG	Basic Resources	14.4	3.6%	1.0	8,911	24.7	1,012	14.2	15,700	4.0%	Link
DBC	Food & Beverage	22.3	1.4%	0.8	8,583	50.6	3,915	5.7	28,800	1.6%	Link
MSN	Food & Beverage	72.1	1.8%	1.1	104,251	302.6	2,710	26.6	98,300	23.9%	Link
VNM	Food & Beverage	61.2	0.7%	0.5	127,905	165.0	4,503	13.6	78,000	49.0%	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	42.3	4.19%	1.2	9,355	60.9	2,494	17.0	21.76%	17.1%	Link
FRT	Retail	158.0	5.33%	1.0	26,908	103.6	4,667	33.9	32.69%	26.1%	Link
BVH	Insurance	80.3	6.92%	0.9	59,609	134.2	3,996	20.1	27.27%	12.6%	Link
DIG	Real Estate	13.5	5.47%	1.0	10,752	137.7	990	13.6	2.69%	7.3%	Link
DXG	Real Estate	13.7	4.98%	1.2	15,240	367.8	229	60.0	20.09%	1.9%	Link
HDC	Real Estate	17.2	5.52%	1.1	3,436	55.5	2,559	6.7	1.46%	24.9%	Link
HDG	Real Estate	29.9	5.85%	1.1	11,043	172.8	1,907	15.7	19.31%	10.9%	Link
IDC	Real Estate	44.7	5.42%	1.4	16,964	71.7	5,090	8.8	14.44%	32.0%	Link
NLG	Real Estate	28.2	6.82%	0.8	13,680	135.0	1,805	15.6	41.14%	6.3%	Link
SIP	Real Estate	55.6	1.28%	1.0	13,461	8.7	5,601	9.9	2.69%	28.5%	Link
SZC	Real Estate	27.8	2.59%	1.2	4,995	10.5	1,916	14.5	4.89%	10.9%	Link
TCH	Real Estate	16.0	6.69%	1.1	14,548	455.7	416	38.4	11.81%	3.0%	Link
VIC	Real Estate	124.0	-1.27%	1.2	955,548	498.9	1,739	71.3	3.07%	9.4%	Link
VRE	Real Estate	25.3	-0.20%	1.4	57,490	69.3	2,837	8.9	11.70%	14.3%	Link
CMG	Technology	28.2	0.00%	1.0	6,556	9.8	1,700	16.6	37.91%	13.1%	Link
PLX	Oil & Gas	39.8	-2.93%	1.0	50,570	351.4	2,122	18.8	14.65%	10.3%	Link
PVD	Oil & Gas	33.5	-2.33%	0.9	18,622	186.6	1,866	18.0	11.80%	6.4%	Link
FTS	Financial Services	24.8	3.55%	1.0	8,593	16.4	1,161	21.4	24.85%	9.3%	Link
MBS	Financial Services	22.9	3.62%	1.5	15,281	63.4	1,883	12.2	0.45%	15.2%	Link
GAS	Utilities	80.7	0.25%	1.0	194,725	153.2	4,730	17.1	2.24%	18.0%	Link
POW	Utilities	12.7	0.00%	1.1	38,962	159.9	857	14.8	2.87%	7.1%	Link
REE	Utilities	66.3	2.00%	0.5	35,912	86.6	4,669	14.2	49.00%	12.7%	Link
VJC	Travel & Leisure	153.0	0.79%	1.0	90,517	397.3	3,728	41.1	6.50%	10.1%	Link
GEX	Industrial Goods & Services	33.6	4.51%	1.5	30,321	184.5	1,638	20.5	6.91%	9.3%	Link
GMD	Industrial Goods & Services	73.9	2.64%	1.0	31,518	85.2	3,986	18.5	41.48%	13.2%	Link
HAH	Industrial Goods & Services	52.0	4.63%	1.0	9,664	51.5	6,759	7.7	5.63%	31.0%	Link
PVT	Industrial Goods & Services	21.2	-0.24%	0.8	9,963	262.4	2,210	9.6	12.74%	12.7%	Link
VTP	Industrial Goods & Services	84.6	2.42%	0.8	10,303	38.8	3,325	25.4	4.79%	24.1%	Link
PNJ	Personal & Household Goods	108.5	2.07%	0.8	37,015	165.1	8,350	13.0	48.91%	23.1%	Link
TCM	Personal & Household Goods	22.2	-1.11%	0.8	2,487	50.4	2,402	9.2	48.44%	11.5%	Link
TNG	Personal & Household Goods	23.2	2.20%	1.4	2,987	32.0	3,163	7.3	22.04%	20.1%	Link
DPM	Chemicals	28.8	0.35%	0.7	19,582	125.0	1,579	18.2	5.96%	9.6%	Link
GVR	Chemicals	28.7	0.35%	1.9	114,800	111.1	1,406	20.4	0.76%	10.3%	Link
EIB	Banks	22.2	4.24%	1.3	41,259	100.2	610	36.3	3.41%	4.5%	Link
LPB	Banks	41.9	1.82%	0.8	125,167	42.3	3,824	11.0	0.76%	25.2%	Link
NAB	Banks	12.5	0.00%	0.6	21,446	21.5	2,438	5.1	1.18%	19.6%	Link
OCB	Banks	11.0	2.34%	0.7	29,160	45.1	1,506	7.3	19.58%	12.2%	Link
NKG	Basic Resources	13.2	2.33%	1.2	5,886	43.1	461	28.5	5.05%	2.9%	Link
ANV	Food & Beverage	22.1	3.03%	1.2	5,884	15.8	3,754	5.9	3.22%	31.6%	Link
BAF	Food & Beverage	34.2	0.74%	0.7	10,398	114.1	341	100.3	3.67%	2.8%	Link
SAB	Food & Beverage	45.1	5.13%	0.5	57,844	40.5	3,449	13.1	58.42%	19.9%	Link
VHC	Food & Beverage	57.4	2.68%	0.9	12,884	19.9	6,073	9.5	20.39%	15.0%	Link
BMP	Construction & Materials	124.8	2.97%	0.4	10,216	29.6	15,010	8.3	81.91%	44.1%	Link
CTD	Construction & Materials	81.3	3.44%	0.8	8,658	46.5	7,388	11.0	48.98%	8.7%	Link
CTR	Construction & Materials	81.2	2.92%	1.0	9,288	18.9	5,243	15.5	5.34%	30.5%	Link
DPG	Construction & Materials	39.8	2.05%	0.9	4,720	13.8	3,177	12.5	19.02%	15.6%	Link
HHV	Construction & Materials	11.7	3.56%	1.1	6,374	50.3	1,211	9.6	10.74%	5.9%	Link
PC1	Construction & Materials	26.1	2.96%	1.0	10,735	138.6	2,553	10.2	15.98%	17.4%	Link
VCG	Construction & Materials	20.6	-0.96%	0.9	13,285	279.6	6,084	3.4	3.64%	39.8%	Link
VGC	Construction & Materials	43.1	2.38%	1.3	19,301	47.5	3,130	13.8	2.63%	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, 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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