

STOCK MARKET

VN-Index today continued to rise by more than 43 points, closing at 1,658.19 points. Market breadth remained positive with all 18/18 sectors advancing, led by Insurance, followed by Chemicals and Oil & Gas. Regarding foreign investor activity, they recorded net selling on the HSX while posting net buying on the other two exchanges. The market is still in a bottoming phase, and investors should trade cautiously.

FUTURES CONTRACTS

Futures contracts increased in line with the VN30.

COVERED WARRANTS

During the trading session on 25/03/2026, covered warrants mostly recovery.

HIGHLIGHT

- VN-Index **+43.42** points, closing at **1658.19** points. HNX-Index **+5.86** points, closing at **249.67** points.
- Pulling the index up: **VIC (+7.82)**, **VHM (+4.66)**, **VPB (+1.80)**, **GVR (+1.59)**, **TCB (+1.44)**.
- Pulling the index down: **SAB (-0.09)**, **LPB (-0.06)**, **VCK (-0.05)**, **SSB (-0.03)**, **HRC (-0.03)**.
- The matched trade value of VN-Index reached VND **21,339** billion, increased **19.02%** compared to the previous session. The total transaction value reached VND 23,349 billion.
- The trading range is 29.04 points. The market had **276** gainers, 42 remaining unchanged, **60** losers.
- Foreign investors' net selling value: VND **-1003.41** billion on HOSE, including **FUEVFNVD (VND -713.48 billion)**, **VCB (VND -209.95 billion)**, **STB (VND -152.75 billion)**, **BID (VND -113.31 billion)**, **MSN (VND -87.68 billion)**. Foreign investors were net buyers on HNX with the value of VND **126.50** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+2.68%**. Positive stocks: **HCM (+6.84%)**, **VHM (+5.25%)**, **KBC (+4.52%)**.
- BSC50 **+3.26%**. Positive stocks: **BVH (+6.97%)**, **REE (+6.94%)**, **PC1 (+6.90%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	2.68%	3.26%	2.69%	2.52%
1 week	-2.16%	-0.92%	-3.25%	-2.90%
1 months	-10.37%	-8.63%	-10.86%	-11.03%
3 months	-2.69%	0.70%	-4.86%	-8.17%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,658.19	249.67	123.74
% 1D	2.69%	2.40%	0.82%
TV (VND bn)	21,339	1,590	527
%1D	19.02%	46.39%	-1.53%
Foreign (VND bn)	-1003.41	126.50	3.23

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MWG	129.62	FUEVFNVD	-713.48
VHM	110.03	VCB	-209.95
ACB	54.33	STB	-152.75
VCI	52.73	BID	-113.31
VPB	49.51	MSN	-87.68

Source: FiinPro-X, BSC compiled

Overview of global stock markets

	%D	%W
SPX	-0.37%	-2.38%
FTSE100	0.97%	-2.36%
Eurostoxx	1.57%	-1.06%
Shanghai	1.30%	-3.23%
Nikkei	2.82%	0.05%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	98.85	3.06%
Gold	4,555	1.65%
Exchange rate		
USD/VND	26,359	-0.02%
EUR/VND	31,353	0.11%
JPY/VND	170	0.00%
Interst rates		
10Y-Gov bond rate	4.33%	
1M-interbank rate	7.83%	

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	128.70	3.79%	7.82	3.08
VHM	104.20	5.25%	4.66	5.51
VPB	26.30	4.16%	1.80	23.59
GVR	30.50	6.27%	1.59	3.97
TCB	30.80	3.18%	1.44	11.24

Top 5 leaders on the HNX

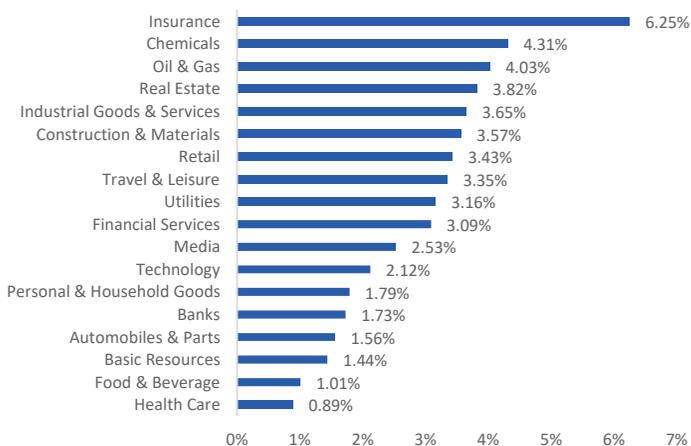
	Close	%	Index pt	Volume (mil)
KSF	85.00	3.66%	1.55	0.03
KSV	143.70	5.97%	0.95	0.04
IDC	46.80	4.70%	0.46	3.59
PVS	42.20	2.93%	0.35	7.29
SHS	16.00	3.90%	0.31	17.70

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
BVH	85.90	6.97%	0.92	1.54
PET	45.30	6.97%	0.07	1.35
NT2	27.70	6.95%	0.11	2.98
REE	70.90	6.94%	0.55	3.86
TV2	39.35	6.93%	0.04	1.59

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
PMP	14.00	9.38%	0.02	0.00
TTL	8.20	9.33%	0.12	0.05
ONE	10.60	9.28%	0.03	0.03
AAV	7.10	9.23%	0.17	1.43
PMC	138.90	9.11%	0.43	0.00

**Figure 1
Sectors performance**

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
SAB	44.75	-0.78%	-0.09	0.87
LPB	41.80	-0.24%	-0.06	0.96
VCK	35.50	-0.42%	-0.05	3.78
SSB	16.75	-0.30%	-0.03	1.78
HRC	57.50	-6.96%	-0.03	0.00

Top 5 laggards on the HNX

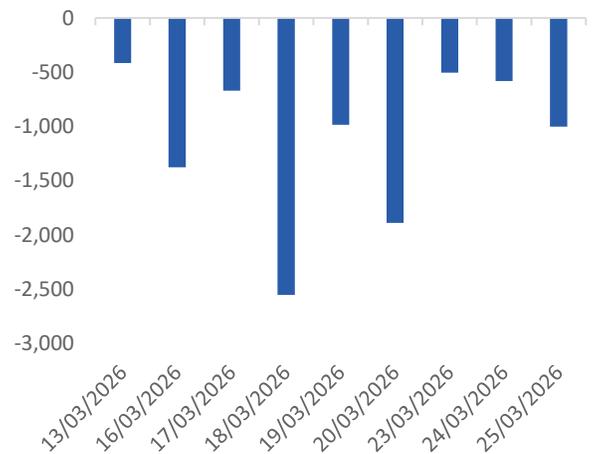
	Close	%	Index pt	Volume (mil)
VCS	41.60	-0.72%	-0.03	0.04
HMH	19.10	-9.91%	-0.01	0.01
MST	8.30	-2.35%	-0.01	4.81
TIG	7.30	-1.35%	-0.01	3.46
IDJ	3.90	-2.50%	-0.01	0.81

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HRC	57.50	-6.96%	-0.02	0.00
SMA	9.77	-6.95%	0.00	0.00
SVD	3.70	-5.13%	0.00	0.00
C47	9.21	-4.06%	0.00	0.55
HAS	8.00	-3.61%	0.00	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
HMH	19.10	-9.91%	-0.10	0.01
NHC	21.20	-9.79%	-0.02	0.00
HEV	6.70	-9.46%	-0.01	0.00
VMC	4.60	-8.00%	-0.04	0.23
PGT	6.00	-4.76%	-0.01	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	79.2	4.2%	1.1	111,600	620.5	4,775	15.9	113,000	48.8%	Link
KBC	Real Estate	28.9	4.5%	1.2	26,040	126.8	2,450	11.3	46,000	9.8%	Link
KDH	Real Estate	25.9	3.4%	1.0	28,055	135.7	943	26.5	39,900	29.1%	Link
PDR	Real Estate	15.3	1.0%	1.1	15,117	157.2	531	28.5	28,200	6.5%	Link
VHM	Real Estate	104.2	5.3%	1.6	406,634	566.6	10,008	9.9	119,600	7.7%	Link
FPT	Technology	77.0	2.1%	0.7	128,444	618.9	5,515	13.7	124,400	33.3%	Link
BSR	Oil & Gas	27.5	4.2%	0.0	132,193	469.6	1,036	25	23,200	2.0%	Link
PVS	Oil & Gas	42.2	2.9%	1.4	20,968	310.1	3,560	11.5	52,300	15.2%	Link
HCM	Financial Services	21.1	6.8%	1.0	21,329	371.9	1,454	13.6	-	34.0%	Link
SSI	Financial Services	26.9	3.7%	1.1	64,519	823.8	1,981	13.1	-	31.7%	Link
VCI	Financial Services	35.0	2.9%	0.8	28,903	437.9	1,849	18.4	-	19.3%	Link
DCM	Chemicals	45.5	0.2%	1.0	24,008	260.5	3,702	12.3	40,200	8.5%	Link
DGC	Chemicals	54.7	4.2%	0.8	19,938	236.6	7,965	6.6	109,300	6.6%	Link
ACB	Banks	23.8	3.0%	0.8	118,657	340.5	3,042	7.6	27,100	27.3%	Link
CTG	Banks	34.1	1.5%	1.0	260,581	214.2	4,454	7.5	53,500	25.3%	Link
HDB	Banks	24.9	2.5%	1.2	121,628	499.2	3,432	7.1	32,700	22.7%	Link
MBB	Banks	26.0	1.6%	0.9	206,208	378.2	3,325	7.7	33,000	23.2%	Link
MSB	Banks	11.3	0.4%	0.9	35,100	230.3	1,804	6.2	14,000	29.1%	Link
STB	Banks	62.2	2.3%	0.6	114,621	545.8	3,150	19.3	-	13.1%	Link
TCB	Banks	30.8	3.2%	1.1	211,524	343.4	3,577	8.3	43,500	22.5%	Link
TPB	Banks	16.2	2.2%	1.0	43,830	201.6	2,660	5.9	-	24.4%	Link
VCB	Banks	58.4	0.3%	0.7	486,300	502.2	4,210	13.8	75,800	20.4%	Link
VIB	Banks	17.3	3.3%	0.8	56,847	146.5	2,143	7.8	23,000	4.9%	Link
VPB	Banks	26.3	4.2%	1.1	200,332	614.0	3,024	8.4	36,500	24.9%	Link
HPG	Basic Resources	26.4	1.5%	0.8	199,178	603.5	2,013	12.9	32,200	22.1%	Link
HSG	Basic Resources	14.4	0.4%	0.8	8,911	59.5	1,012	14.2	15,700	3.8%	Link
DBC	Food & Beverage	23.3	4.5%	0.8	8,583	75.2	3,915	5.7	28,800	1.6%	Link
MSN	Food & Beverage	73.2	1.5%	1.0	104,251	297.6	2,710	26.6	98,300	23.8%	Link
VNM	Food & Beverage	62.1	1.5%	0.5	127,905	213.7	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	43.6	3.07%	1.1	9,355	90.0	2,494	17.0	21.82%	17.1%	Link
FRT	Retail	158.6	0.38%	0.9	26,908	59.7	4,667	33.9	32.96%	26.1%	Link
BVH	Insurance	85.9	6.97%	1.1	59,609	129.6	3,996	20.1	27.29%	12.6%	Link
DIG	Real Estate	13.8	2.22%	0.9	10,752	161.3	990	13.6	2.74%	7.3%	Link
DXG	Real Estate	14.2	3.28%	1.0	15,240	288.7	229	60.0	19.96%	1.9%	Link
HDC	Real Estate	18.0	4.36%	0.8	3,436	62.5	2,559	6.7	1.64%	24.9%	Link
HDG	Real Estate	30.6	2.51%	1.1	11,043	174.3	1,907	15.7	19.35%	10.9%	Link
IDC	Real Estate	46.8	4.70%	1.4	16,964	205.1	5,090	8.8	14.54%	32.0%	Link
NLG	Real Estate	29.3	3.90%	0.9	13,680	180.3	1,805	15.6	41.13%	6.3%	Link
SIP	Real Estate	56.8	2.16%	1.1	13,461	34.8	5,601	9.9	2.56%	28.5%	Link
SZC	Real Estate	28.5	2.70%	1.0	4,995	17.2	1,916	14.5	4.90%	10.9%	Link
TCH	Real Estate	16.5	3.45%	1.2	14,548	247.4	416	38.4	11.81%	3.0%	Link
VIC	Real Estate	128.7	3.79%	1.5	955,548	398.6	1,739	71.3	3.01%	9.4%	Link
VRE	Real Estate	26.4	4.15%	1.4	57,490	136.1	2,837	8.9	11.70%	14.3%	Link
CMG	Technology	28.8	2.31%	1.0	6,556	6.8	1,700	16.6	37.89%	13.1%	Link
PLX	Oil & Gas	41.3	3.77%	1.0	50,570	178.5	2,122	18.8	14.61%	10.3%	Link
PVD	Oil & Gas	34.8	3.73%	1.0	18,622	190.6	1,866	18.0	11.69%	6.4%	Link
FTS	Financial Services	25.4	2.42%	1.0	8,593	16.4	1,161	21.4	24.76%	9.3%	Link
MBS	Financial Services	23.6	3.06%	1.7	15,281	101.7	1,883	12.2	0.45%	15.2%	Link
GAS	Utilities	82.5	2.23%	1.0	194,725	165.8	4,730	17.1	2.25%	18.0%	Link
POW	Utilities	13.4	5.12%	0.9	38,962	293.5	857	14.8	2.89%	7.3%	Link
REE	Utilities	70.9	6.94%	0.5	35,912	270.6	4,669	14.2	49.00%	12.7%	Link
VJC	Travel & Leisure	153.0	0.00%	0.7	90,517	196.6	3,728	41.1	6.49%	10.1%	Link
GEX	Industrial Goods & Services	35.6	5.95%	0.9	30,321	500.8	1,638	20.5	6.94%	9.3%	Link
GMD	Industrial Goods & Services	77.2	4.47%	0.9	31,518	117.7	3,986	18.5	41.51%	13.2%	Link
HAH	Industrial Goods & Services	53.7	3.27%	0.6	9,664	82.3	6,759	7.7	5.62%	31.0%	Link
PVT	Industrial Goods & Services	21.7	2.36%	0.8	9,963	190.6	2,210	9.6	12.74%	12.7%	Link
VTP	Industrial Goods & Services	88.9	5.08%	0.8	10,303	45.6	3,325	25.4	4.78%	24.1%	Link
PNJ	Personal & Household Goods	111.0	2.30%	0.7	37,015	198.6	8,350	13.0	48.91%	23.1%	Link
TCM	Personal & Household Goods	22.5	1.35%	0.9	2,487	31.6	2,402	9.2	48.44%	11.5%	Link
TNG	Personal & Household Goods	24.3	4.74%	1.4	2,987	41.1	3,163	7.3	22.17%	20.1%	Link
DPM	Chemicals	29.4	2.08%	0.9	19,582	167.0	1,579	18.2	5.82%	9.6%	Link
GVR	Chemicals	30.5	6.27%	1.7	114,800	119.3	1,406	20.4	0.76%	10.3%	Link
EIB	Banks	22.6	1.81%	1.0	41,259	138.6	610	36.3	3.42%	4.5%	Link
LPB	Banks	41.8	-0.24%	0.9	125,167	39.9	3,824	11.0	0.73%	25.2%	Link
NAB	Banks	12.7	1.60%	0.5	21,446	36.5	2,438	5.1	1.03%	19.6%	Link
OCB	Banks	11.2	2.28%	0.8	29,160	27.8	1,506	7.3	19.58%	12.2%	Link
NKG	Basic Resources	13.4	1.90%	0.9	5,886	38.0	461	28.5	5.05%	2.9%	Link
ANV	Food & Beverage	23.1	4.52%	1.0	5,884	27.2	3,754	5.9	3.24%	31.6%	Link
BAF	Food & Beverage	34.5	0.73%	0.6	10,398	78.3	341	100.3	3.52%	2.8%	Link
SAB	Food & Beverage	44.8	-0.78%	0.7	57,844	38.9	3,449	13.1	58.41%	19.9%	Link
VHC	Food & Beverage	58.5	1.92%	0.9	12,884	19.4	6,073	9.5	20.39%	15.0%	Link
BMP	Construction & Materials	128.2	2.72%	0.2	10,216	42.7	15,010	8.3	81.86%	44.1%	Link
CTD	Construction & Materials	84.1	3.44%	0.9	8,658	82.3	7,388	11.0	48.98%	8.7%	Link
CTR	Construction & Materials	82.8	1.97%	1.0	9,288	28.1	5,243	15.5	5.27%	30.5%	Link
DPG	Construction & Materials	40.9	2.64%	0.9	4,720	34.9	3,177	12.5	19.02%	15.6%	Link
HHV	Construction & Materials	12.1	3.86%	1.0	6,374	65.1	1,211	9.6	10.63%	5.9%	Link
PC1	Construction & Materials	27.9	6.90%	1.0	10,735	194.1	2,553	10.2	15.98%	17.4%	Link
VCG	Construction & Materials	22.0	6.81%	0.8	13,285	334.4	6,084	3.4	3.42%	39.8%	Link
VGC	Construction & Materials	45.5	5.69%	1.1	19,301	41.7	3,130	13.8	2.57%	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, Logistic, 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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