

STOCK MARKET

VN-Index surged to the 1,675 level right from the opening, but selling pressure at this level pushed the index into a consolidation range of 1,635-1,650 before closing at 1,644.63 points, down nearly 14 points compared to the previous session. Market breadth tilted negative, with 14 out of 18 sectors declining, led by Insurance, followed by Information Technology, among others. On the upside, the Industrial Goods & Services sector posted a positive session. Regarding foreign flows, foreign investors recorded net selling on HSX, while posting net buying on HNX and UPCoM. The market is currently seeking equilibrium within the 1,600-1,725 range; in the near term, it faces resistance at 1,645-1,660 and needs to break above this zone to move back toward the 1,700-1,725 range.

FUTURES CONTRACTS

All futures contracts declined in line with the market's correction.

COVERED WARRANTS

During the trading session on 26/03/2026, covered warrants mostly correction.

HIGHLIGHT

- VN-Index **-13.56** points, closing at **1644.63** points. HNX-Index **-1.46** points, closing at **248.21** points.
- Pulling the index up: **VIC (+2.18)**, **GEE (+0.54)**, **DCM (+0.38)**, **DPM (+0.26)**, **VJC (+0.26)**.
- Pulling the index down: **VHM (-2.66)**, **GAS (-1.11)**, **FPT (-0.99)**, **TCB (-0.97)**, **VCB (-0.89)**.
- The matched trade value of VN-Index reached VND **17,531** billion, decreased **-17.85%** compared to the previous session. The total transaction value reached VND 22,054 billion.
- The trading range is 27.05 points. The market had **123** gainers, 46 remaining unchanged, **207** losers.
- Foreign investors' net selling value: VND **-741.87** billion on HOSE, including **FUEVFNVD (VND -353.03 billion)**, **FPT (VND -246.70 billion)**, **VCB (VND -103.12 billion)**, **DGC (VND -84.75 billion)**, **STB (VND -66.47 billion)**. Foreign investors were net buyers on HNX with the value of VND **39.84** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.83%**. Positive stocks: **DCM (+6.93%)**, **HCM (+3.08%)**, **VCI (+2.57%)**.
- BSC50 **-0.21%**. Positive stocks: **TNG (+7.00%)**, **VTP (+6.97%)**, **DPM (+5.78%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.83%	-0.21%	-0.82%	-1.29%
1 week	-1.82%	-0.37%	-3.21%	-3.39%
1 months	-10.95%	-9.02%	-11.94%	-12.66%
3 months	-1.72%	1.66%	-4.92%	-8.89%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,644.63	248.21	123.59
% 1D	-0.82%	-0.58%	-0.12%
TV (VND bn)	17,531	1,254	404
%1D	-17.85%	-21.41%	-38.10%
Foreign (VND bn)	-741.87	39.84	5.55

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MWG	164.00	FUEVFNVD	-353.03
DCM	65.55	FPT	-246.70
ACB	55.73	VCB	-103.12
HCM	43.71	DGC	-84.75
VCI	39.38	STB	-66.47

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	6,592	0.54%	-0.50%
FTSE100	10,022	-0.84%	-0.41%
Eurostoxx	5,585	-1.15%	-0.60%
Shanghai	3,889	-1.09%	-2.93%
Nikkei	53,604	-0.27%	-3.17%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	98.85	0.73%
Gold	4,555	1.31%
Exchange rate		
USD/VND	26,357	-0.01%
EUR/VND	31,228	-0.40%
JPY/VND	169	-0.59%
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	130.00	1.01%	2.18	10.46
GEE	169.00	4.06%	0.54	1.16
DCM	48.60	6.93%	0.38	8.04
DPM	31.10	5.78%	0.26	12.33
VJC	155.00	1.31%	0.26	2.16

Top 5 leaders on the HNX

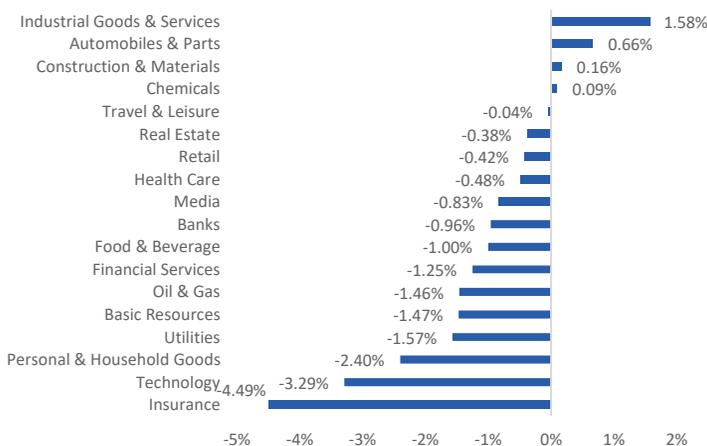
	Close	%	Index pt	Volume (mil)
HUT	17.10	2.40%	0.25	6.32
TNG	26.00	7.00%	0.13	4.16
LAS	17.80	4.71%	0.05	1.25
PVI	80.00	0.50%	0.05	0.04
HTC	49.60	9.98%	0.05	0.01

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
VTP	95.10	6.97%	0.17	0.86
PIT	8.02	6.93%	0.00	0.01
DCM	48.60	6.93%	0.38	8.04
BFC	57.20	6.92%	0.05	0.46
HU1	6.73	6.83%	0.00	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
HTC	49.60	9.98%	0.31	0.01
TJC	16.60	9.93%	0.05	0.01
AME	6.90	9.52%	0.16	0.00
ONE	11.60	9.43%	0.03	0.03
SGH	24.00	9.09%	0.10	0.00

**Figure 1
Sectors performance**

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VHM	101.10	-2.98%	-2.66	3.58
GAS	80.30	-2.67%	-1.11	1.30
FPT	74.20	-3.64%	-0.99	10.73
TCB	30.15	-2.11%	-0.97	8.77
VCB	57.90	-0.86%	-0.89	6.24

Top 5 laggards on the HNX

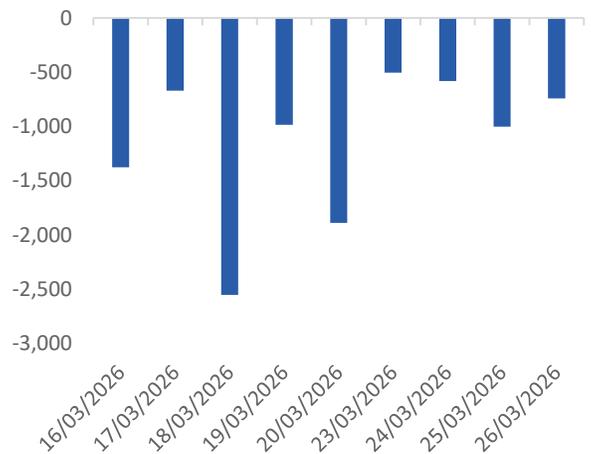
	Close	%	Index pt	Volume (mil)
KSF	83.70	-1.53%	-0.66	0.04
NVB	10.70	-1.83%	-0.21	0.19
KSV	142.00	-1.18%	-0.19	0.03
MBS	23.10	-2.12%	-0.19	3.06
NTP	54.70	-2.32%	-0.12	0.11

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
VCF	306.90	-7.00%	-0.12	0.00
HRC	53.50	-6.96%	-0.02	0.00
PAC	26.50	-5.36%	-0.02	1.93
AAM	6.07	-5.16%	0.00	0.00
BVH	81.50	-5.12%	-0.66	0.80

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
CTT	17.70	-9.69%	-0.03	0.00
KKC	5.90	-9.23%	-0.01	0.00
VC6	23.90	-8.78%	-0.09	0.00
PIC	17.00	-8.11%	-0.17	0.00
SHN	3.50	-7.89%	-0.14	0.02

**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	78.5	-0.9%	1.1	115,271	690.6	4,775	16.4	113,000	48.5%	Link
KBC	Real Estate	28.7	-0.7%	1.0	27,028	50.8	2,450	11.7	46,000	9.6%	Link
KDH	Real Estate	25.5	-1.6%	1.0	28,560	69.2	943	27.0	39,900	29.0%	Link
PDR	Real Estate	15.4	0.3%	1.2	15,316	114.7	531	28.9	28,200	6.5%	Link
VHM	Real Estate	101.1	-3.0%	1.5	415,259	368.7	10,200	9.9	119,600	7.7%	Link
FPT	Technology	74.2	-3.6%	0.7	126,400	808.1	5,515	13.5	124,400	33.3%	Link
BSR	Oil & Gas	27.3	-0.9%	0.0	136,449	258.3	1,036	26	-	2.0%	Link
PVS	Oil & Gas	42.0	-0.5%	1.4	21,480	210.1	3,560	11.8	52,300	15.6%	Link
HCM	Financial Services	21.8	3.1%	1.0	23,489	382.8	1,454	15.0	-	34.1%	Link
SSI	Financial Services	26.4	-1.9%	1.0	65,640	621.8	1,979	13.3	-	31.7%	Link
VCI	Financial Services	26.4	2.6%	0.8	30,298	283.5	1,311	20.1	-	19.4%	Link
DCM	Chemicals	48.6	6.9%	0.9	25,729	379.3	3,702	13.1	40,200	8.6%	Link
DGC	Chemicals	52.3	-4.4%	1.0	19,862	266.7	7,965	6.6	96,700	6.5%	Link
ACB	Banks	23.6	-0.8%	0.8	121,225	194.9	3,042	7.8	27,100	27.4%	Link
CTG	Banks	33.8	-0.7%	1.0	262,523	193.5	4,454	7.6	53,500	25.3%	Link
HDB	Banks	24.6	-1.4%	1.0	122,880	394.7	3,432	7.2	32,700	22.5%	Link
MBB	Banks	25.8	-0.8%	1.0	207,819	419.9	3,325	7.8	32,400	23.2%	Link
MSB	Banks	11.3	0.0%	1.0	35,256	42.5	1,804	6.3	14,000	29.1%	Link
STB	Banks	60.6	-2.6%	0.8	114,244	452.1	3,150	19.2	-	13.0%	Link
TCB	Banks	30.2	-2.1%	1.1	213,650	269.1	3,577	8.4	43,500	22.5%	Link
TPB	Banks	15.9	-1.6%	1.1	44,107	117.6	2,660	6.0	-	24.4%	Link
VCB	Banks	57.9	-0.9%	0.8	483,794	361.0	4,210	13.8	75,800	20.4%	Link
VIB	Banks	17.0	-1.7%	0.8	57,698	160.5	2,143	7.9	23,000	5.0%	Link
VPB	Banks	26.2	-0.4%	1.0	207,869	574.3	3,024	8.7	36,500	24.9%	Link
HPG	Basic Resources	25.9	-1.7%	0.9	198,795	495.0	2,013	12.9	32,200	22.1%	Link
HSG	Basic Resources	14.5	0.7%	0.9	9,004	29.4	1,012	14.3	15,700	3.8%	Link
DBC	Food & Beverage	22.9	-1.7%	0.9	8,813	33.2	3,915	5.9	28,800	1.6%	Link
MSN	Food & Beverage	72.1	-1.5%	1.0	104,251	347.6	2,710	26.6	100,400	23.8%	Link
VNM	Food & Beverage	61.0	-1.8%	0.6	127,487	125.9	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	45.0	3.21%	1.0	9,953	95.7	2,492	18.1	21.93%	17.1%	Link
FRT	Retail	158.0	-0.38%	0.9	26,908	55.4	4,667	33.9	33.05%	26.1%	Link
BVH	Insurance	81.5	-5.12%	1.1	60,499	66.5	3,996	20.4	27.35%	12.6%	Link
DIG	Real Estate	13.6	-1.81%	1.0	10,792	145.5	990	13.7	2.74%	7.3%	Link
DXG	Real Estate	13.9	-2.12%	1.0	15,407	216.7	229	60.6	19.71%	1.9%	Link
HDC	Real Estate	17.8	-1.11%	1.0	3,546	55.3	2,559	6.9	1.64%	24.9%	Link
HDG	Real Estate	29.6	-3.27%	1.0	10,951	105.7	1,907	15.5	19.35%	10.9%	Link
IDC	Real Estate	46.8	0.00%	1.3	17,761	93.8	5,090	9.2	14.71%	32.0%	Link
NLG	Real Estate	28.4	-3.07%	0.9	13,777	123.9	1,805	15.7	41.18%	6.3%	Link
SIP	Real Estate	56.3	-0.88%	0.9	13,631	6.8	5,601	10.1	2.56%	28.5%	Link
SZC	Real Estate	28.3	-0.70%	0.9	5,094	14.0	1,916	14.8	4.89%	10.9%	Link
TCH	Real Estate	15.9	-3.64%	1.1	14,503	232.3	416	38.3	11.97%	3.0%	Link
VIC	Real Estate	130.0	1.01%	1.7	1,001,784	1335.9	1,468	88.6	3.00%	9.4%	Link
VRE	Real Estate	25.6	-3.04%	1.3	58,058	53.0	2,837	9.0	11.77%	14.3%	Link
CMG	Technology	28.9	0.35%	1.0	6,731	10.9	1,700	17.0	37.89%	13.1%	Link
PLX	Oil & Gas	39.9	-3.39%	0.9	50,697	170.0	2,122	18.8	14.61%	10.3%	Link
PVD	Oil & Gas	34.7	-0.14%	0.7	19,289	144.1	1,866	18.6	11.70%	6.4%	Link
FTS	Financial Services	25.0	-1.57%	1.1	8,662	14.5	1,161	21.5	24.77%	9.3%	Link
MBS	Financial Services	23.1	-2.12%	1.7	15,414	71.2	1,883	12.3	0.45%	15.2%	Link
GAS	Utilities	80.3	-2.67%	0.9	193,760	104.6	4,730	17.0	2.25%	18.0%	Link
POW	Utilities	13.1	-1.87%	1.0	40,189	193.9	857	15.3	2.88%	7.3%	Link
REE	Utilities	71.7	1.13%	0.6	38,837	148.5	4,669	15.4	49.00%	12.7%	Link
VJC	Travel & Leisure	155.0	1.31%	0.8	91,700	330.3	3,728	41.6	6.46%	10.1%	Link
GEX	Industrial Goods & Services	35.4	-0.56%	1.0	31,945	533.4	1,638	21.6	6.66%	9.3%	Link
GMD	Industrial Goods & Services	77.8	0.78%	1.0	33,181	170.7	3,986	19.5	41.56%	13.2%	Link
HAH	Industrial Goods & Services	54.5	1.49%	0.7	10,128	59.7	6,755	8.1	5.61%	31.0%	Link
PVT	Industrial Goods & Services	22.4	3.23%	0.8	10,526	291.5	2,208	10.1	12.74%	12.7%	Link
VTP	Industrial Goods & Services	95.1	6.97%	0.7	11,582	80.6	3,325	28.6	4.75%	24.1%	Link
PNJ	Personal & Household Goods	106.0	-4.50%	0.7	36,162	317.8	8,350	12.7	48.90%	23.1%	Link
TCM	Personal & Household Goods	23.2	3.11%	0.8	2,599	54.1	2,402	9.7	48.44%	11.5%	Link
TNG	Personal & Household Goods	26.0	7.00%	1.4	3,347	104.0	3,172	8.2	22.17%	20.1%	Link
DPM	Chemicals	31.1	5.78%	0.8	21,146	370.5	1,579	19.7	5.82%	9.6%	Link
GVR	Chemicals	30.0	-1.64%	1.2	120,000	73.0	1,406	21.3	0.77%	10.3%	Link
EIB	Banks	22.4	-0.67%	1.1	41,725	705.4	610	36.7	3.38%	4.5%	Link
LPB	Banks	41.8	0.00%	0.6	124,868	26.6	3,824	10.9	0.72%	25.2%	Link
NAB	Banks	12.9	1.18%	0.5	22,047	13.5	2,438	5.3	0.99%	19.6%	Link
OCB	Banks	11.2	-0.45%	0.8	29,693	576.4	1,506	7.4	19.58%	12.2%	Link
NKG	Basic Resources	13.4	-0.37%	1.0	5,975	45.4	461	28.9	5.02%	2.9%	Link
ANV	Food & Beverage	22.8	-1.52%	1.1	6,057	14.1	3,754	6.1	3.38%	31.6%	Link
BAF	Food & Beverage	34.6	0.44%	0.6	10,519	49.9	341	101.4	3.41%	2.8%	Link
SAB	Food & Beverage	43.8	-2.23%	0.8	56,112	26.8	3,449	12.7	58.41%	19.9%	Link
VHC	Food & Beverage	59.3	1.37%	0.8	13,310	30.1	6,073	9.8	20.39%	15.0%	Link
BMP	Construction & Materials	125.1	-2.42%	0.5	10,241	36.9	15,010	8.3	81.71%	44.1%	Link
CTD	Construction & Materials	85.5	1.66%	0.9	9,106	110.1	7,388	11.6	48.99%	8.7%	Link
CTR	Construction & Materials	85.0	2.66%	0.9	9,723	96.2	5,243	16.2	5.28%	30.5%	Link
DPG	Construction & Materials	40.7	-0.37%	0.9	4,826	17.0	3,178	12.8	19.04%	15.6%	Link
HHV	Construction & Materials	12.1	-0.41%	1.0	6,593	64.7	1,210	10.0	10.72%	5.9%	Link
PC1	Construction & Materials	28.3	1.43%	0.7	11,639	365.2	2,553	11.1	15.84%	17.4%	Link
VCG	Construction & Materials	21.8	-0.91%	0.8	14,061	205.0	6,084	3.6	3.51%	39.8%	Link
VGC	Construction & Materials	44.7	-1.76%	1.1	20,041	32.0	3,130	14.3	2.56%	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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