

STOCK MARKET

VN-Index traded in negative territory during the morning session under prevailing selling pressure. However, in the afternoon, emerging buying demand helped the index recover toward the reference level. At the close, VN-Index ended at 1,666.54 points (down 10.26 points). Market breadth tilted to the downside with 11 out of 18 sectors declining, led by sharp corrections in Information Technology and Financial Services. On the other hand, the Oil & Gas sector led gains (+3.27%). Regarding foreign investor activity, they recorded net selling on HSX while posting net buying on both HNX and UPCOM. Although investor sentiment remains cautious, holding the support zone of 1,645–1,660 is a positive signal for the index to target the 1,700–1,725 range in upcoming sessions, despite potential continued volatility.

FUTURES CONTRACTS

All futures contracts declined, moving in line with the trajectory of the VN30 index.

COVERED WARRANTS

During the trading session on 30/03/2026, most covered warrants correction in line with the underlying securities

HIGHLIGHT

- VN-Index **-10.26** points, closing at **1662.54** points. HNX-Index **-1.77** points, closing at **250.59** points.
- Pulling the index up: **BSR (+1.76)**, **GEE (+1.01)**, **GVR (+0.89)**, **HPG (+0.67)**, **STB (+0.54)**.
- Pulling the index down: **VIC (-5.03)**, **VCB (-1.41)**, **CTG (-1.23)**, **FPT (-0.75)**, **MBB (-0.68)**.
- The matched trade value of VN-Index reached VND **19,458** billion, decreased **-4.19%** compared to the previous session. The total transaction value reached VND 21,521 billion.
- The trading range is 34.02 points. The market had **118** gainers, 59 remaining unchanged, **204** losers.
- Foreign investors' net selling value: VND **-1362.39** billion on HOSE, including **FPT (VND -203.71 billion)**, **VCB (VND -111.26 billion)**, **VPB (VND -108.13 billion)**, **STB (VND -81.96 billion)**, **VHM (VND -64.48 billion)**. Foreign investors were net buyers on HNX with the value of VND **26.92** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.28%**. Positive stocks: **BSR (+5.62%)**, **KBC (+3.58%)**, **STB (+2.17%)**.
- BSC50 **-0.51%**. Positive stocks: **SIP (+3.45%)**, **GVR (+3.12%)**, **PVD (+1.26%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.28%	-0.51%	-0.61%	-0.53%
1 week	6.02%	7.31%	4.49%	4.07%
1 months	-7.94%	-6.90%	-11.58%	-12.12%
3 months	-0.94%	2.26%	-5.91%	-9.84%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,662.54	250.59	124.81
% 1D	-0.61%	-0.70%	0.39%
TV (VND bn)	19,458	1,254	462
%1D	-4.19%	-30.12%	-22.24%
Foreign (VND bn)	-1362.39	26.92	0.97

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MSN	53.01	FPT	-203.71
MWG	34.46	VCB	-111.26
DGW	32.28	VPB	-108.13
VNM	24.90	STB	-81.96
GEE	24.56	VHM	-64.48

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	6,369	-1.67%	-2.12%
FTSE100	10,049	0.82%	1.57%
Eurostoxx	5,530	0.51%	-2.19%
Shanghai	3,923	0.24%	2.88%
Nikkei	51,886	-2.92%	0.58%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	115.17	9.35%
Gold	4,538	1.01%
Exchange rate		
USD/VND	26,355	
EUR/VND	31,092	-0.10%
JPY/VND	169	0.00%
Interst rates		
10Y-Gov bond rate	4.33%	
1M-interbank rate	7.15%	

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)
BSR	29.15	5.62%	1.76	19.72
GEE	184.60	6.95%	1.01	1.87
GVR	33.10	3.12%	0.89	5.38
HPG	26.90	1.51%	0.67	47.03
STB	61.20	2.17%	0.54	8.12

Top 5 leaders on the HNX

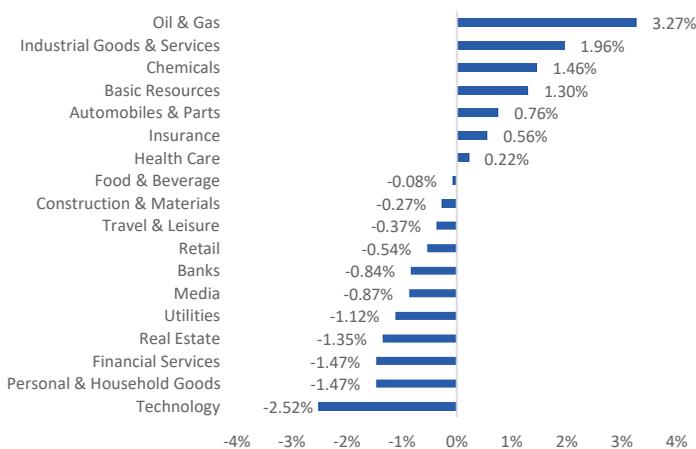
	Close	%	Index pt	Volume (mil)
KSV	161.20	9.96%	1.82	0.09
PMC	138.60	10.00%	0.07	0.00
PRE	22.80	5.07%	0.07	0.00
IDC	48.80	0.62%	0.07	2.69
PVI	79.50	0.51%	0.05	0.04

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
HID	5.35	7.00%	0.01	0.99
DXS	7.23	6.95%	0.06	6.22
GEE	184.60	6.95%	1.00	1.87
HTN	7.25	6.93%	0.01	0.49
COM	33.25	6.91%	0.01	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
KSV	161.20	9.96%	12.03	0.09
BTW	65.30	9.93%	0.23	0.00
TJC	20.00	9.89%	0.06	0.00
SCI	10.10	9.78%	0.16	0.20
KSD	4.50	9.76%	0.02	0.00

Figure 1
Sectors performance

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VIC	129.50	-2.34%	-5.03	2.06
VCB	58.00	-1.36%	-1.41	10.74
CTG	34.05	-2.16%	-1.23	6.11
FPT	74.00	-2.76%	-0.75	8.98
MBB	25.75	-1.53%	-0.68	12.95

Top 5 laggards on the HNX

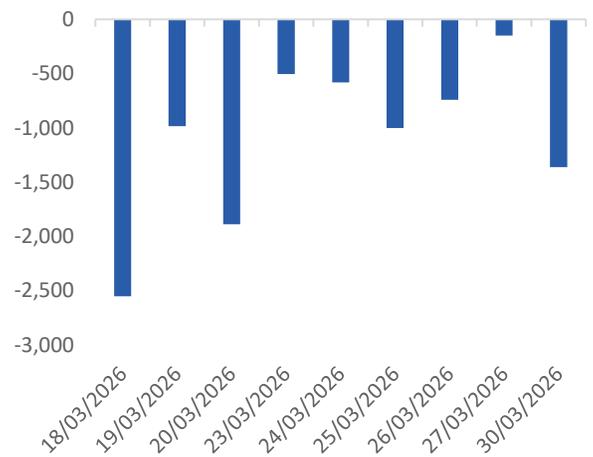
	Close	%	Index pt	Volume (mil)
KSF	82.70	-1.19%	-0.50	0.03
HUT	17.10	-2.29%	-0.24	2.70
NVB	10.70	-1.83%	-0.21	0.08
SHS	16.70	-2.34%	-0.20	11.80
MBS	23.60	-1.26%	-0.11	3.84

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
CRC	9.70	-6.73%	-0.01	4.85
DQC	9.33	-6.70%	0.00	0.01
CVT	24.10	-6.23%	-0.01	0.00
VCF	310.00	-5.49%	-0.10	0.00
PJT	8.90	-5.22%	0.00	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
HMH	17.20	-9.95%	-0.09	0.00
ALT	12.50	-9.42%	-0.03	0.01
PGN	6.20	-8.82%	-0.02	0.02
SDU	11.10	-8.26%	-0.07	0.00
CAG	6.60	-5.71%	-0.02	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	80.8	-0.3%	1.2	118,649	489.0	4,775	16.9	113,000	48.6%	Link
KBC	Real Estate	31.8	3.6%	1.4	29,948	222.0	2,450	13.0	46,000	9.3%	Link
KDH	Real Estate	26.1	-1.3%	1.2	29,234	113.9	936	27.8	39,900	28.9%	Link
PDR	Real Estate	16.6	1.2%	1.4	16,564	295.8	531	31.3	28,200	6.4%	Link
VHM	Real Estate	103.0	0.0%	1.2	423,063	329.8	10,200	10.1	119,600	7.6%	Link
FPT	Technology	74.0	-2.8%	0.7	126,060	671.6	5,515	13.4	124,400	33.3%	Link
BSR	Oil & Gas	29.2	5.6%	0.0	145,963	567.4	1,041	28	-	1.9%	Link
PVS	Oil & Gas	42.8	0.0%	1.4	21,889	228.5	3,560	12.0	52,300	15.8%	Link
HCM	Financial Services	22.3	0.2%	1.3	24,083	328.2	1,454	15.3	-	34.3%	Link
SSI	Financial Services	26.6	-1.9%	1.3	66,139	686.2	1,975	13.5	-	31.6%	Link
VCI	Financial Services	26.2	-2.1%	1.1	30,011	163.0	1,311	19.9	-	19.6%	Link
DCM	Chemicals	49.0	1.0%	0.8	25,941	174.7	3,702	13.2	40,200	9.2%	Link
DGC	Chemicals	49.1	-5.2%	1.1	18,647	340.7	7,965	6.2	96,700	6.5%	Link
ACB	Banks	23.8	-0.2%	0.9	121,996	174.6	3,042	7.8	27,100	27.5%	Link
CTG	Banks	34.1	-2.2%	1.1	264,464	208.9	4,454	7.7	53,500	25.3%	Link
HDB	Banks	25.2	-0.4%	1.1	126,133	461.4	3,432	7.3	32,700	22.4%	Link
MBB	Banks	25.8	-1.5%	1.0	207,416	335.0	3,325	7.8	32,400	23.2%	Link
MSB	Banks	11.4	0.0%	0.9	35,412	221.0	1,804	6.3	14,000	29.0%	Link
STB	Banks	61.2	2.2%	1.0	115,375	491.2	3,150	19.4	-	12.8%	Link
TCB	Banks	30.5	-0.5%	1.2	216,130	308.5	3,577	8.5	43,500	22.5%	Link
TPB	Banks	16.0	-1.9%	1.2	44,246	84.6	2,660	6.0	-	24.4%	Link
VCB	Banks	58.0	-1.4%	0.9	484,629	606.4	4,210	13.8	75,800	20.4%	Link
VIB	Banks	16.9	-0.6%	0.8	57,528	68.9	2,143	7.9	23,000	5.0%	Link
VPB	Banks	26.1	-1.3%	1.3	207,075	465.8	3,024	8.6	36,500	24.9%	Link
HPG	Basic Resources	26.9	1.5%	1.1	206,470	1249.4	2,013	13.4	32,200	22.0%	Link
HSG	Basic Resources	15.0	0.3%	1.3	9,284	54.5	1,012	14.8	15,700	3.7%	Link
DBC	Food & Beverage	23.2	-0.2%	1.0	8,910	50.9	3,915	5.9	28,800	1.6%	Link
MSN	Food & Beverage	74.8	2.1%	1.2	108,154	485.2	2,710	27.6	100,400	23.7%	Link
VNM	Food & Beverage	60.6	-1.5%	0.6	126,651	260.7	4,503	13.5	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	45.8	0.66%	1.2	10,130	67.2	2,492	18.4	22.38%	17.1%	Link
FRT	Retail	158.0	-2.77%	0.8	26,908	99.3	4,667	33.9	33.14%	26.1%	Link
BVH	Insurance	84.5	0.60%	1.1	62,726	64.5	3,996	21.2	27.36%	12.6%	Link
DIG	Real Estate	14.2	-1.73%	1.3	11,309	193.2	990	14.4	2.68%	7.3%	Link
DXG	Real Estate	14.3	-2.05%	1.3	15,907	244.0	229	62.6	19.57%	1.9%	Link
HDC	Real Estate	19.1	0.53%	1.5	3,805	104.7	2,559	7.4	1.69%	24.9%	Link
HDG	Real Estate	29.3	-1.68%	1.2	10,840	89.8	1,907	15.4	19.37%	10.9%	Link
IDC	Real Estate	48.8	0.62%	1.7	18,520	129.1	5,090	9.6	15.13%	32.0%	Link
NLG	Real Estate	28.8	-2.04%	1.2	13,947	96.2	1,805	15.9	41.16%	6.3%	Link
SIP	Real Estate	60.0	3.45%	1.0	14,527	34.5	5,601	10.7	2.54%	28.5%	Link
SZC	Real Estate	29.3	-0.85%	1.3	5,265	25.1	1,916	15.3	4.80%	10.9%	Link
TCH	Real Estate	16.4	-2.10%	1.4	14,913	183.7	416	39.3	12.15%	3.0%	Link
VIC	Real Estate	129.5	-2.34%	1.1	997,931	266.8	1,468	88.2	3.45%	8.0%	Link
VRE	Real Estate	25.7	-0.39%	1.0	58,285	64.1	2,837	9.0	11.75%	14.3%	Link
CMG	Technology	29.1	-0.34%	1.2	6,766	6.6	1,700	17.1	37.81%	13.1%	Link
PLX	Oil & Gas	41.4	-2.01%	0.8	52,603	227.6	2,122	19.5	14.54%	10.3%	Link
PVD	Oil & Gas	36.2	1.26%	0.8	20,123	147.2	1,866	19.4	11.75%	6.4%	Link
FTS	Financial Services	25.1	-2.15%	1.2	8,680	16.9	1,161	21.6	24.78%	9.3%	Link
MBS	Financial Services	23.6	-1.26%	1.6	15,748	90.1	1,882	12.5	0.47%	15.2%	Link
GAS	Utilities	80.8	-1.58%	0.9	194,966	165.7	4,730	17.1	2.24%	18.0%	Link
POW	Utilities	13.1	0.00%	1.1	40,035	265.5	856	15.3	2.88%	7.3%	Link
REE	Utilities	70.0	-2.37%	0.5	37,916	230.6	4,669	15.0	48.97%	12.7%	Link
VJC	Travel & Leisure	157.1	0.06%	0.8	92,942	194.6	3,728	42.2	6.45%	10.1%	Link
GEX	Industrial Goods & Services	36.3	0.97%	1.6	32,757	512.3	1,638	22.2	6.67%	9.3%	Link
GMD	Industrial Goods & Services	78.5	0.00%	1.0	33,480	108.0	3,986	19.7	41.56%	13.2%	Link
HAH	Industrial Goods & Services	56.0	0.18%	1.0	10,407	44.0	6,748	8.3	5.58%	31.0%	Link
PVT	Industrial Goods & Services	21.9	-2.02%	0.6	10,268	272.1	2,208	9.9	12.46%	12.7%	Link
VTP	Industrial Goods & Services	97.5	-1.71%	1.0	11,874	47.7	3,325	29.3	4.89%	24.1%	Link
PNJ	Personal & Household Goods	108.0	-1.73%	1.2	36,844	149.9	8,350	12.9	48.81%	23.1%	Link
TCM	Personal & Household Goods	23.0	-1.29%	0.9	2,571	39.1	2,402	9.6	48.39%	11.5%	Link
TNG	Personal & Household Goods	25.7	0.00%	1.7	3,308	53.4	3,172	8.1	22.16%	20.2%	Link
DPM	Chemicals	30.9	0.16%	0.9	20,976	224.7	1,579	19.5	6.06%	9.6%	Link
GVR	Chemicals	33.1	3.12%	1.4	132,400	174.8	1,406	23.5	0.76%	10.3%	Link
EIB	Banks	23.0	1.10%	1.2	42,843	287.2	610	37.7	3.34%	4.5%	Link
LPB	Banks	42.0	0.36%	0.5	125,316	63.3	3,824	11.0	0.71%	25.2%	Link
NAB	Banks	13.1	-1.14%	0.5	22,390	24.2	2,438	5.4	0.93%	19.6%	Link
OCB	Banks	11.2	-0.45%	0.8	29,693	5.8	1,506	7.4	19.59%	12.2%	Link
NKG	Basic Resources	13.9	0.72%	1.3	6,221	63.7	461	30.1	4.98%	2.9%	Link
ANV	Food & Beverage	23.5	0.00%	1.2	6,244	19.6	3,754	6.3	3.48%	31.6%	Link
BAF	Food & Beverage	34.8	0.14%	0.5	10,565	109.6	341	101.9	3.39%	2.8%	Link
SAB	Food & Beverage	44.2	0.00%	0.5	56,625	31.3	3,449	12.8	58.41%	19.9%	Link
VHC	Food & Beverage	59.3	0.85%	1.1	13,310	25.6	6,073	9.8	20.33%	15.0%	Link
BMP	Construction & Materials	126.9	-1.01%	0.5	10,388	12.8	15,010	8.5	81.53%	44.1%	Link
CTD	Construction & Materials	84.0	-1.98%	1.1	8,946	62.3	7,388	11.4	49.00%	8.7%	Link
CTR	Construction & Materials	86.0	0.47%	1.2	9,837	46.7	5,243	16.4	5.31%	30.5%	Link
DPG	Construction & Materials	40.4	-2.42%	1.2	4,785	13.7	3,172	12.7	19.05%	15.6%	Link
HHV	Construction & Materials	12.1	-0.82%	1.1	6,621	64.6	1,209	10.0	10.69%	5.9%	Link
PC1	Construction & Materials	29.2	0.17%	1.0	11,989	328.8	2,553	11.4	15.89%	17.4%	Link
VCG	Construction & Materials	22.2	1.14%	0.9	14,319	217.0	6,084	3.6	3.41%	39.8%	Link
VGC	Construction & Materials	44.8	-1.75%	1.4	20,086	43.1	3,130	14.3	2.53%	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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