

STOCK MARKET

The VN-Index surged at the open and traded around the 1,290 level. By the end of the session, the VN-Index closed at 1,286.36 points, continuing to rise by more than 4 points compared to the previous day. The number of declining stocks exceeded the number of advancing ones, with 11 out of 18 sectors gaining, indicating a divergence in cash flow. Regarding foreign transactions, today foreign investors recorded net buying on the HSX exchange and net selling on the HNX exchange. The VN-Index is currently continuously returning to old resistance levels; however, low liquidity suggests risks. Investors should trade with caution in the upcoming sessions.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 10/10/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **+4.51** points, closing at **1286.36** points. HNX-Index **-0.48** points, closing at 231.29 points.
- Pulling the index up: **FPT (+2.33)**, **VCB (+1.23)**, **MSN (+1.09)**, **VPB (+0.58)**, **BID (+0.42)**.
- Pulling the index down: **HPG (-0.38)**, **VHM (-0.36)**, **STB (-0.25)**, **VIC (-0.18)**, **LPB (-0.18)**.
- The matched trade value of VN-Index reached VND **17,120** billion, increased **7.07%** compared to the previous session. The total transaction value reached VND 18,406 billion.
- The trading range is 9.36 points. The market had **163** gainers, 69 remaining unchanged, **206** losers.
- Foreign investors' net buying value: VND **504.49** billion on HOSE, including **MSN (VND 365.78 billion)**, **FPT (VND 310.88 billion)**, **NTL (VND 159.07 billion)**, **TCB (VND 135.76 billion)**, **CMG (VND 20.86 billion)**. Foreign investors were net sellers on HNX with the value of VND **-25.64** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+0.91%**. Positive stocks: **CTR (+3.82%)**, **ACB (+2.94%)**, **MSN (+2.39%)**.
- BSC50 **+1.05%**. Positive stocks: **VTP (+6.93%)**, **SZC (+3.44%)**, **DBC (+3.07%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.91%	1.05%	0.78%	0.96%
1 week	-1.21%	-1.49%	-1.23%	-1.14%
1 months	-0.42%	-0.56%	-0.28%	0.27%
3 months	2.35%	0.98%	1.80%	3.48%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,286.36	231.29	92.57
% 1D	0.35%	-0.21%	0.13%
TV (bil VND)	17,120	836	535
%1D	7.07%	-1.90%	-3.44%
Foreign (bil VND)	504.49	-25.64	-21.25

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
MSN	365.78	STB	-126.77
FPT	310.88	CTG	-49.25
NTL	159.07	VPB	-49.14
TCB	135.76	HCM	-33.73
CMG	20.86	MSB	-33.43

Overview of global stock markets

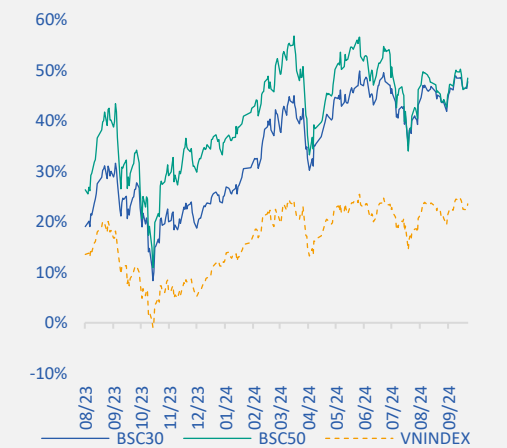
		%D	%W
SPX	5,792	0.71%	1.44%
FTSE100	8,240	-0.05%	-0.52%
Eurostoxx	4,965	0.20%	1.06%
Shanghai	3,302	1.32%	10.03%
Nikkei	39,415	0.29%	2.24%

Source: Bloomberg

	Close	%
Commodities		
Brent	77	0.43%
Gold	2,608	-0.82%
Exchange rate		
USD/VND	25,030	0.02%
EUR/VND	27,947	-0.27%
JPY/VND	170	-0.58%
Interst rates		
10Y-Gov bond rate	2.67%	-0.01%
1M-interbank rate	3.77%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
FPT	141.70	4.65%	2.33	1.46
VCB	91.90	0.99%	1.23	5.59
MSN	80.00	3.90%	1.09	1.44
VPB	20.55	1.48%	0.58	7.93
BID	49.75	0.61%	0.42	5.70

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PVI	47.00	2.17%	0.18	0.23
NET	92.50	4.64%	0.07	0.02
THD	35.50	0.57%	0.06	0.38
VIF	16.80	1.20%	0.05	0.35
HGM	80.00	6.67%	0.05	0.01

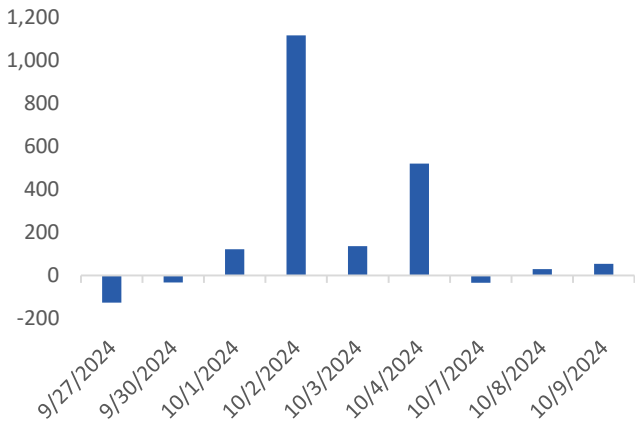
Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
MSH	47.50	6.98%	0.06	0.50
HHV	10.75	6.97%	0.08	9.46
BMC	21.60	6.93%	0.00	0.44
VRC	8.81	6.92%	0.01	0.15
STG	43.95	6.80%	0.07	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BPC	14.40	9.92%	0.01	0.03
DTC	8.90	9.88%	0.01	0.00
HTC	5.60	9.80%	0.02	0.06
PIA	23.90	9.63%	0.14	0.00
PCT	34.00	8.97%	0.05	0.00

Figure 1
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
HPG	27.25	-0.91%	-0.38	6.40
VHM	42.15	-0.82%	-0.36	4.35
STB	33.60	-1.61%	-0.25	1.89
VIC	41.40	-0.48%	-0.18	3.82
LPB	33.30	-0.89%	-0.18	2.56

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
MBS	29.50	-1.99%	-0.24	0.55
SHS	15.50	-1.27%	-0.12	0.81
KSV	51.80	-1.15%	-0.09	0.20
PVS	41.10	-0.48%	-0.07	0.48
BAB	12.00	-0.83%	-0.07	0.90

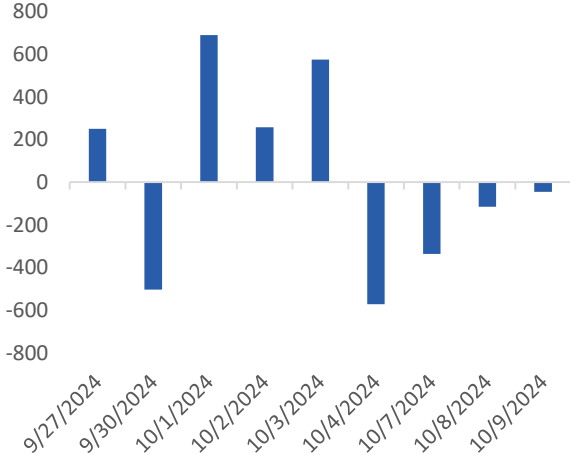
Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HVN	10.00	-6.98%	-0.01	1.92
HAG	10.75	-6.93%	-0.19	35.41
HHS	8.61	-6.92%	-0.05	3.41
NHA	23.55	-6.92%	-0.02	1.42
DXV	4.59	-6.90%	0.00	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
DAE	12.80	-9.86%	-0.01	0.00
HMR	21.10	-9.83%	-0.04	0.20
CMS	18.40	-9.80%	-0.17	0.61
TXM	6.50	-9.72%	-0.02	0.04
MCO	12.20	-9.63%	-0.02	0.05

Figure 2
Foreign transactions



Source: FiinProX, BSC Research

BSC30 PORTFOLIO

Stocks	Sector	Close (1,000 VND)	% Day	Beta	MC (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	TP (VND)	Foreign ownershi- p	Link
VCB	Bank	91.9	1.00%	0.6	20,682	4.9	5,962	15.4	105,000	23.3%	Link
BID	Bank	49.8	0.60%	1.1	11,419	5.3	4,006	12.4	54,578	17.2%	Link
VPB	Bank	20.6	1.50%	1.0	6,565	37.4	1,461	14.1	23,685	26.1%	Link
TCB	Bank	24.6	-0.40%	1.2	6,964	18.0	3,047	8.1	-	20.9%	Link
MBB	Bank	25.5	-0.40%	1.0	5,448	12.7	4,018	6.3	24,400	23.2%	Link
STB	Bank	33.6	-1.60%	1.3	2,551	28.1	4,340	7.7	31,200	22.9%	Link
CTG	Bank	36.2	0.10%	1.3	7,817	9.1	3,782	9.6	19,100	26.3%	Link
ACB	Bank	26.2	-0.20%	0.8	4,712	9.6	3,676	7.1	42,500	30.0%	Link
SSI	Broker	27.6	0.90%	1.4	2,176	16.5	1,882	14.6	45,900	41.3%	Link
IDC	IP	56.4	0.00%	1.2	749	1.8	5,573	10.1	-	24.5%	Link
HPG	Material	27.2	-0.90%	1.1	7,018	26.1	1,746	15.6	23,300	23.7%	Link
HSG	Material	20.9	-1.90%	1.6	518	9.7	1,844	11.3	79,900	17.3%	Link
VHM	RE	42.2	-0.80%	0.9	7,390	9.2	5,350	7.9	38,900	14.2%	Link
KDH	RE	37.5	-0.50%	1.3	1,373	2.1	765	49.0	44,100	38.1%	Link
NLG	RE	40.2	-0.90%	1.2	622	1.4	1,102	36.4	46,100	48.8%	Link
DGC	Chemicals	115.8	0.70%	1.5	1,771	15.7	7,898	14.7	85,000	18.1%	Link
DCM	Fertilizer	37.8	-1.20%	1.3	806	4.0	2,828	13.4	41,000	7.4%	Link
GAS	O&G	73.3	0.80%	0.6	6,914	3.1	4,760	15.4	36,000	1.9%	Link
PVS	O&G	41.1	-0.50%	1.0	791	5.0	1,932	21.3	110,500	22.1%	Link
PVD	O&G	27.4	-1.30%	1.4	612	4.5	1,155	23.7	45,000	15.6%	Link
POW	Utilities	12.9	-0.40%	0.6	1,216	1.6	463	27.9	38,500	4.1%	Link
VHC	Fishery	72.0	0.70%	1.4	651	1.4	3,234	22.3	29,000	29.8%	Link
GMD	Logistics	76.6	1.50%	0.9	958	1.9	4,054	18.9	14,500	48.6%	Link
VNM	Retail	67.7	-0.10%	0.6	5,697	7.1	4,633	14.6	81,700	51.5%	Link
MSN	Retail	80.0	3.90%	1.2	4,874	64.0	466	171.6	27,700	28.6%	Link
MWG	Retail	65.0	1.20%	1.2	3,826	22.7	1,507	43.1	63,800	46.9%	Link
PNJ	Retail	95.5	1.20%	1.0	1,299	4.7	6,132	15.6	83,500	49.0%	Link
DGW	Retail	45.3	-0.40%	1.8	396	1.7	2,236	20.3	90,900	25.1%	Link
FPT	Tech	141.7	4.70%	1.1	8,333	56.8	4,890	29.0	57,000	45.2%	Link
CTR	Tech	133.2	0.10%	1.4	614	1.7	4,590	29.0	108,000	9.4%	Link

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 (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	P/B	Foreign ownershi- p	ROE (%)
HDB	Bank	27.4	1.70%	1.0	3,219	11.7	4,137	6.6	1.6	19.5%	27.8%
VIB	Bank	19.1	-0.50%	1.1	2,291	13.5	3,048	6.3	1.3	20.5%	21.4%
TPB	Bank	17.4	-0.90%	1.2	1,856	24.2	2,154	8.1	1.1	28.4%	14.2%
MSB	Bank	12.7	-1.60%	1.1	1,330	10.7	2,366	5.4	0.7	29.5%	14.9%
EIB	Bank	18.8	-1.80%	0.7	1,414	4.8	1,273	14.8	1.4	2.8%	9.9%
HCM	Broker	30.4	-0.80%	1.6	862	9.0	1,397	21.8	2.0	45.3%	10.6%
VCI	Broker	36.4	-2.70%	1.6	842	16.6	1,763	20.7	1.8	20.1%	9.6%
VND	Broker	15.1	-0.70%	1.5	926	7.8	1,591	9.5	1.3	13.5%	15.0%
BSI	Broker	50.7	-1.20%	1.7	455	1.3	2,165	23.4	2.1	40.0%	9.3%
SHS	Broker	15.5	-1.30%	1.7	508	2.9	1,338	11.6	1.1	8.9%	10.5%
CTD	Const	61.9	-0.80%	1.4	249	0.9	2,996	20.7	0.7	47.1%	3.6%
HHV	Const	12.0	-0.80%	1.7	208	1.4	869	13.7	0.6	7.7%	4.4%
LCG	Const	10.8	-0.50%	1.6	84	0.6	766	14.1	0.8	2.1%	5.7%
SZC	IP	37.3	-0.70%	1.1	270	1.3	1,549	24.1	2.3	3.2%	12.1%
SIP	IP	73.3	0.00%	1.4	621	0.4	5,931	12.4	3.4	2.0%	29.0%
PHR	IP	58.2	-0.90%	1.0	318	0.2	3,028	19.2	2.1	18.5%	12.1%
DIG	RE	21.4	-0.20%	1.7	524	5.0	151	141.4	1.7	4.7%	1.1%
CEO	RE	15.2	-0.70%	1.8	331	1.4	318	47.8	1.3	4.8%	2.1%
KBC	IP	27.8	-1.10%	1.6	861	3.4	300	92.9	1.2	20.5%	1.7%
VGC	IP	44.0	0.70%	1.3	794	1.5	1,776	24.8	2.4	4.7%	8.2%
GVR	IP	35.6	0.00%	1.5	5,742	3.5	693	51.4	2.8	0.5%	6.5%
NKG	Material	21.7	-1.60%	1.6	230	4.5	1,580	13.7	1.0	13.1%	7.4%
BMP	Material	119.9	-1.40%	1.3	395	0.9	11,420	10.5	3.7	82.6%	34.6%
IJC	RE	13.7	1.90%	1.4	208	1.0	683	20.1	1.0	4.6%	6.0%
DXG	RE	15.2	-1.60%	1.5	441	3.9	249	61.1	1.0	15.4%	1.9%
VRE	RE	18.4	-0.30%	1.4	1,688	2.7	1,975	9.3	1.0	22.2%	11.9%
PDR	RE	20.8	-1.70%	1.8	731	6.1	557	37.3	1.7	6.4%	5.0%
DIG	RE	21.4	-0.20%	1.7	524	5.0	151	141.4	1.7	4.7%	1.1%
HUT	Const	16.5	0.00%	1.1	593	1.6	64	260.0	1.7	1.5%	1.7%
C4G	Const	8.8	0.00%	1.2	-	0.1	503	17.5	0.8	0.0%	4.8%
CSV	Chemicals	37.8	0.70%	2.0	168	1.3	4,748	8.0	1.1	3.8%	15.2%
DHC	Chemicals	37.2	-0.10%	1.2	121	0.1	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	29.0	-1.20%	0.9	139	0.8	2,509	11.6	1.8	11.7%	16.5%
PC1	Utilities	28.2	0.70%	1.4	352	1.6	1,203	23.4	1.7	13.8%	6.1%
HDG	Utilities	27.6	-1.10%	1.3	373	1.8	1,958	14.1	1.5	15.7%	11.8%
GEX	Utilities	21.2	1.00%	1.5	732	3.8	1,245	17.0	1.4	8.3%	7.0%
QTP	Utilities	14.0	0.00%	0.6	-	0.1	1,357	10.3	1.1	1.2%	11.2%
PLX	O&G	44.5	0.20%	0.8	2,277	1.3	2,879	15.5	2.2	18.2%	13.8%
BSR	O&G	24.3	0.00%	1.0	-	5.6	2,408	10.1	1.3	0.7%	13.4%
PLC	O&G	24.4	0.00%	1.5	79	0.1	734	33.3	1.6	0.5%	4.7%
ANV	Fishery	33.7	0.10%	1.6	181	0.8	114	296.4	1.6	1.0%	1.2%
PTB	Material	61.8	0.30%	0.9	167	0.1	4,899	12.6	1.5	24.9%	11.9%
VSC	Logistics	17.2	-0.90%	1.3	199	0.7	713	24.2	1.1	3.1%	7.3%
HAH	Logistics	42.0	-0.40%	1.3	205	4.5	2,800	15.0	1.8	7.7%	10.6%
VTP	Logistics	82.0	0.20%	1.6	402	2.6	2,893	28.3	6.3	6.9%	22.8%
DBC	Retail	30.2	0.00%	1.5	407	8.8	979	30.8	1.5	12.1%	5.0%
FRT	Retail	179.5	1.40%	0.8	985	5.5	(414)	-433.2	14.7	36.1%	11.8%
QNS	Retail	48.9	0.80%	0.6	-	0.8	6,678	7.3	2.0	13.8%	28.7%
TNG	Textile	24.5	-0.40%	1.3	121	0.9	2,254	10.9	1.5	19.5%	14.7%
PVT	Logistics	29.0	-0.90%	1.1	416	2.2	2,805	10.4	1.4	13.2%	14.2%
DPM	Fertilizer	34.9	-1.10%	1.3	550	3.5	1,703	20.5	1.2	8.8%	5.5%
REE	Utilities	65.5	-0.20%	1.1	1,242	1.7	3,804	17.2	1.7	49.0%	10.0%

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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