

STOCK MARKET

The VN-Index dropped sharply by more than 21 points today, closing at 1,854.1 points, mainly due to declines in Vin-related stocks. While the broader market remained somewhat lacking in consensus, capital flows showed better dispersion. Advancers outnumbered decliners, with 9 out of 18 sectors posting gains. The Chemicals sector recorded the strongest increase, while the Real Estate sector led the declines. Regarding foreign flows, investors recorded net selling on HSX and UPCOM, while net buying was observed on HNX. The market remains unstable with wide fluctuations; investors are advised to maintain a cautious stance.

FUTURES CONTRACTS

Most VN30 futures contracts increased in line with the movement of the VN30 index, except for 4111G5000 and 4111GC000.

COVERED WARRANTS

During the trading session on 29/04/2026, most covered warrants moves in line with the correction of the underlying stock.

HIGHLIGHT

- VN-Index **-21.74** points, closing at 1854.1 points. HNX-Index **+1.22** points, closing at **250.66** points.
- Pulling the index up: **LPB (+1.14)**, **GAS (+0.90)**, **VRE (+0.77)**, **GVR (+0.62)**, **VPL (+0.55)**.
- Pulling the index down: **VIC (-18.20)**, **VHM (-4.28)**, **TCB (-1.12)**, **VPB (-0.84)**, **MCH (-0.68)**.
- The matched trade value of VN-Index reached VND **18,224** billion, increased **0.92%** compared to the previous session. The total transaction value reached VND 21,087 billion.
- The trading range is 39.88 points. The market had **161** gainers, 70 remaining unchanged, **136** losers.
- Foreign investors' net selling value: VND **-1347.11** billion on HOSE, including **VIC (VND -401.56 billion)**, **PC1 (VND -232.75 billion)**, **VHM (VND -146.39 billion)**, **VCB (VND -142.40 billion)**, **FPT (VND -119.17 billion)**. Foreign investors were net buyers on HNX with the value of VND **74.81** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **+0.16%**. Positive stocks: **DCM (+5.82%)**, **PVS (+4.97%)**, **DGC (+2.49%)**.
- BSC50 **+0.39%**. Positive stocks: **VRE (+4.87%)**, **DIG (+4.26%)**, **LPB (+3.73%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.16%	0.39%	-1.16%	-0.91%
1 week	-1.77%	-2.25%	0.92%	0.68%
1 months	3.06%	-0.11%	10.84%	11.05%
3 months	-4.66%	-3.81%	-0.89%	-2.65%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,854.10	250.66	127.49
% 1D	-1.16%	0.49%	-0.15%
TV (VND bn)	18,224	1,079	359
%1D	0.92%	47.53%	-26.49%
Foreign (VND bn)	-1347.11	74.81	-25.05

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VRE	139.09	VIC	-401.56
DCM	48.59	PC1	-232.75
GEX	37.17	VHM	-146.39
DIG	34.32	VCB	-142.40
GMD	28.14	FPT	-119.17

Source: FiinPro-X, BSC compiled

Overview of global stock markets

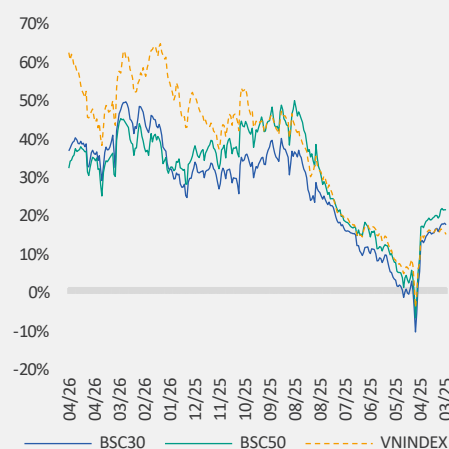
		%D	%W
SPX	7,139	-0.49%	1.06%
FTSE100	10,267	-0.64%	-2.00%
Eurostoxx	5,812	-0.49%	-1.62%
Shanghai	4,108	0.71%	0.03%
Nikkei	59,917	-1.02%	0.96%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	114.56	2.97%
Gold	4,576	-0.46%
Exchange rate		
USD/VND	26,352	0.02%
EUR/VND	30,829	-0.10%
JPY/VND	16,503	-0.07%
Interest rates		
10Y-Gov bond rate	4.24%	0.00%
1M-interbank rate	7.07%	0.00%

Source: FiinPro-X, BSC compiled

Performances of BSC30, BSC50



Source: BSC

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MARKET STATISTICS
Top 5 leaders on the HSX

	Close	%Day	Index pt	Volume (mil)
LPB	47.30	3.73%	1.14	1.43
GAS	75.20	2.31%	0.90	1.27
VRE	32.30	4.87%	0.77	16.97
GVR	33.70	2.12%	0.62	4.05
VPL	85.70	1.66%	0.55	0.67

Top 5 leaders on the HNX

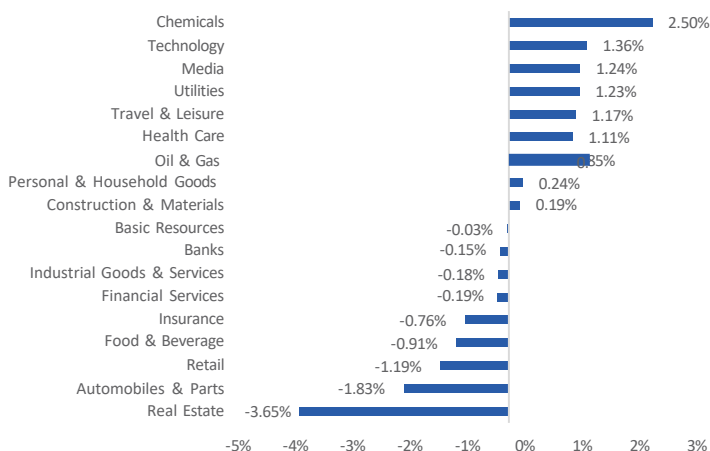
	Close	%Day	Index pt	Volume (mil)
PVS	38.00	4.97%	0.54	4.82
KSF	92.00	1.10%	0.51	0.04
PVI	77.00	3.08%	0.31	0.11
CEO	17.80	3.49%	0.20	20.12
KSV	151.30	0.87%	0.15	0.02

Top 5 gainers on the HSX

	Close	%Day	Index pt	Volume (mil)
BFC	67.60	6.96%	0.05	0.80
IMP	50.80	6.95%	0.11	0.03
SPM	9.10	6.93%	0.00	0.00
HII	5.75	6.88%	0.01	1.15
FDC	18.80	6.82%	0.01	0.00

Top 5 gainers on the HNX

	Close	%Day	Index pt	Volume (mil)
QTC	36.30	10.00%	0.00	0.00
SGH	24.20	10.00%	0.02	0.01
HTC	40.10	9.86%	0.03	0.01
HMH	17.00	9.68%	0.01	0.00
PGT	7.00	9.38%	0.00	0.00

Figure 1
Sectors performance

Top 5 laggards on the HSX

	Close	%Day	Index pt	Volume (mil)
VIC	214.00	-5.10%	-18.20	5.82
VHM	146.00	-3.31%	-4.28	8.38
TCB	33.85	-2.17%	-1.12	17.62
VPB	26.50	-1.85%	-0.84	24.85
MCH	137.00	-1.79%	-0.68	0.22

Top 5 laggards on the HNX

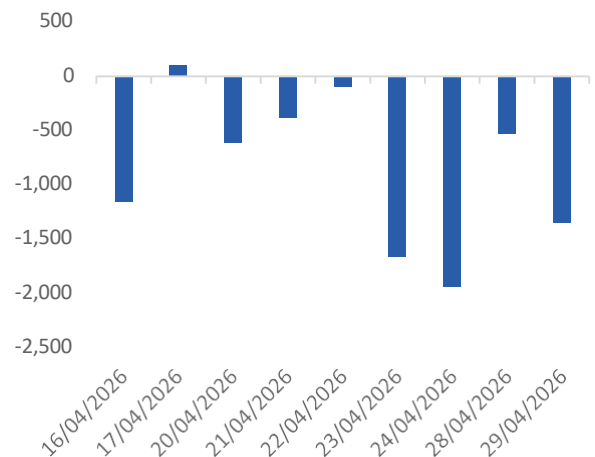
	Close	%Day	Index pt	Volume (mil)
NVB	10.50	-1.87%	-0.21	0.29
IDC	45.20	-1.09%	-0.11	1.66
NTP	58.50	-1.18%	-0.07	0.10
HUT	15.90	-0.63%	-0.06	1.99
SEB	42.00	-7.69%	-0.06	0.00

Top 5 losers on the HSX

	Close	%Day	Index pt	Volume (mil)
PTC	6.80	-6.85%	0.00	0.01
HRC	39.20	-6.67%	-0.02	0.00
PC1	19.55	-6.46%	-0.12	42.10
VVS	113.00	-5.83%	-0.03	0.30
VIC	214.00	-5.10%	-18.83	5.82

Top 5 losers on the HNX

	Close	%Day	Index pt	Volume (mil)
TJC	16.20	-9.50%	-0.01	0.02
DS3	5.10	-8.93%	0.00	0.00
SEB	42.00	-7.69%	-0.02	0.00
KSD	3.80	-7.32%	0.00	0.00
VHE	3.10	-6.06%	-0.01	0.08

Figure 2
Foreign transactions

Source: FiiPro-X, BSC compiled

BSC30 PORTFOLIO

Stocks	Sector	Close (x1000 VND)	% Day	Beta	MC (VND bn)	Liquidity (VND bn)	EPS (VND)	P/E	TP (x1000 VND)	Foreign ownership	Link
MWG	Retail	84.0	-1.9%	1.1	123,348	606.8	5,552	15.1	113.0	48.9%	Link
KBC	Real Estate	33.9	-0.3%	1.4	31,925	79.9	1,714	19.8	46.0	9.3%	Link
KDH	Real Estate	25.4	0.0%	0.9	28,504	205.8	936	27.1	39.9	28.0%	Link
PDR	Real Estate	16.5	1.5%	1.2	16,414	192.3	531	31.0	28.2	6.2%	Link
VHM	Real Estate	146.0	-3.3%	1.5	599,682	1263.1	15,766	9.3	132.6	8.0%	Link
FPT	Technology	75.5	1.5%	0.7	128,615	807.0	5,691	13.3	124.4	31.4%	Link
BSR	Oil & Gas	23.6	0.9%	0.0	118,172	228.1	1,041	23	-	1.5%	Link
PVS	Oil & Gas	38.0	5.0%	1.6	19,434	180.7	3,616	10.5	52.3	15.7%	Link
HCM	Financial Services	26.8	0.0%	1.3	28,889	89.8	1,382	19.4		34.8%	Link
SSI	Financial Services	27.7	0.0%	1.2	68,879	339.7	2,153	12.8		32.0%	Link
VCI	Financial Services	26.2	-0.2%	1.0	30,068	238.5	1,314	19.9		20.0%	Link
DCM	Chemicals	42.7	5.8%	0.5	22,605	154.5	4,413	9.7	53.3	9.6%	Link
DGC	Chemicals	53.6	2.5%	0.7	20,356	73.7	6,911	7.8	96.7	6.5%	Link
ACB	Banks	23.5	0.0%	0.7	120,711	314.7	3,167	7.4	27.1	27.2%	Link
CTG	Banks	35.0	0.4%	0.9	271,455	233.9	4,906	7.1	53.5	25.3%	Link
HDB	Banks	26.6	0.0%	1.1	133,140	569.8	3,437	7.7	32.7	21.8%	Link
MBB	Banks	26.1	0.2%	0.8	209,833	345.8	3,442	7.6	32.4	23.0%	Link
MSB	Banks	12.5	0.0%	0.9	39,000	64.7	1,884	6.6	14.0	25.1%	Link
STB	Banks	67.5	-0.9%	0.8	127,252	336.0	2,454	27.5		12.4%	Link
TCB	Banks	33.9	-2.2%	1.1	239,869	598.4	3,677	9.2	43.5	22.5%	Link
TPB	Banks	16.3	0.0%	1.0	45,078	65.6	2,668	6.1	-	24.5%	Link
VCB	Banks	59.8	0.0%	0.8	499,669	390.2	4,210	14.2	75.8	20.1%	Link
VIB	Banks	16.3	-0.9%	0.8	55,485	171.8	2,231	7.3	23.0	4.9%	Link
VPB	Banks	26.5	-1.9%	1.3	210,249	673.8	3,314	8.0	36.5	24.6%	Link
HPG	Basic Resources	27.8	0.0%	0.8	212,994	478.9	2,013	13.8	32.2	22.7%	Link
HSG	Basic Resources	16.0	-0.6%	1.1	9,905	61.1	1,012	15.8	15.7	3.9%	Link
DBC	Food & Beverage	22.6	0.4%	0.8	8,698	46.3	3,915	5.8	28.8	1.5%	Link
MSN	Food & Beverage	76.8	-0.8%	1.1	111,046	309.2	3,268	23.5	100.4	24.6%	Link
VNM	Food & Beverage	60.9	-0.5%	0.5	127,278	157.2	4,503	13.5	78.0	48.9%	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 (x1,000 VND)	% Day	Beta	MC (VND bn)	Liquidity (VND bn)	EPS (VND)	P/E	Foreign ownershi p	ROE (%)	Link
DGW	Retail	43.5	1.05%	1.1	9,610	34.5	2,914	14.9	23.64%	19.2%	Link
FRT	Retail	149.0	1.02%	0.9	25,375	47.9	4,193	35.5	32.14%	19.6%	Link
BVH	Insurance	70.5	-0.70%	0.8	52,334	33.8	3,821	18.5	27.25%		Link
DIG	Real Estate	14.7	4.26%	1.1	11,708	226.4	987	14.9	2.15%		Link
DXG	Real Estate	15.4	3.02%	1.2	17,075	384.5	231	66.6	20.21%		Link
HDC	Real Estate	19.1	2.96%	1.1	3,815	60.3	2,734	7.0	1.22%	24.8%	Link
HDG	Real Estate	25.9	1.37%	0.9	9,582	46.3	2,082	12.4	19.80%		Link
IDC	Real Estate	45.2	-1.09%	1.5	17,153	74.6	5,090	8.9	16.69%		Link
NLG	Real Estate	27.8	0.73%	0.8	13,461	54.6	1,599	17.4	41.17%	5.9%	Link
SIP	Real Estate	60.7	0.00%	1.0	14,696	8.6	5,464	11.1	2.46%		Link
SZC	Real Estate	27.2	0.00%	1.2	4,896	16.2	1,309	20.8	3.83%	7.4%	Link
TCH	Real Estate	18.2	1.40%	1.1	16,555	251.4	239	76.1	13.79%	1.8%	Link
VIC	Real Estate	214.0	-5.10%	1.3	1,649,091	1266.2	1,506	142.1	3.36%	8.0%	Link
VRE	Real Estate	32.3	4.87%	1.4	73,396	547.2	3,025	10.7	12.10%	14.6%	Link
CMG	Technology	27.8	0.54%	0.9	6,475	3.2	1,700	16.4	37.23%		Link
PLX	Oil & Gas	37.2	0.54%	1.0	47,203	131.8	2,106	17.6	14.29%		Link
PVD	Oil & Gas	31.0	1.64%	0.9	17,232	99.5	1,868	16.6	10.73%		Link
FTS	Financial Services	26.1	0.19%	1.0	9,026	12.0	1,173	22.2	24.79%	9.2%	Link
MBS	Financial Services	19.4	-0.51%	1.5	19,418	58.9	1,793	10.8	0.37%	15.0%	Link
GAS	Utilities	75.2	2.31%	1.0	181,454	94.6	4,808	15.6	2.15%	17.3%	Link
POW	Utilities	12.7	0.00%	1.0	38,808	117.5	849	14.9	2.94%		Link
REE	Utilities	60.3	0.50%	0.4	32,662	56.8	4,858	12.4	49.00%	12.8%	Link
VJC	Travel & Leisure	180.0	0.73%	0.9	106,490	601.0	3,728	48.3	6.41%		Link
GEX	Industrial Goods & Services	39.1	0.26%	1.5	35,284	697.2	1,638	23.9	6.98%		Link
GMD	Industrial Goods & Services	75.3	0.40%	1.0	32,115	62.0	4,173	18.1	41.71%		Link
HAH	Industrial Goods & Services	55.1	0.73%	0.9	10,378	15.4	6,692	8.2	11.47%		Link
PVT	Industrial Goods & Services	22.0	2.09%	0.8	10,338	125.4	2,208	10.0	13.49%		Link
VTP	Industrial Goods & Services	68.0	-1.16%	0.8	11,759	53.8	3,239	21.0	4.33%		Link
PNJ	Personal & Household Good	67.3	0.45%	0.8	34,439	138.1	5,554	12.1	48.68%		Link
TCM	Personal & Household Good	23.0	0.00%	0.9	2,571	15.9	2,290	10.0	48.32%	10.7%	Link
TNG	Personal & Household Good	21.0	0.00%	1.4	2,703	25.8	3,269	6.4	22.03%	21.1%	Link
DPM	Chemicals	26.5	3.31%	0.6	18,018	130.7	1,578	16.8	5.71%		Link
GVR	Chemicals	33.7	2.12%	1.8	134,800	135.8	1,572	21.4	0.63%	11.0%	Link
EIB	Banks	21.8	-0.46%	1.3	40,514	196.6	401	54.2	3.02%	2.9%	Link
LPB	Banks	47.3	3.73%	0.6	141,298	66.9	3,738	12.7	0.90%	24.7%	Link
NAB	Banks	14.1	0.36%	0.6	24,191	21.5	2,438	5.8	0.94%		Link
OCB	Banks	11.3	0.00%	0.7	29,959	56.1	1,604	7.0	19.65%	12.7%	Link
NKG	Basic Resources	14.4	0.35%	1.2	6,423	38.5	461	31.1	4.97%		Link
ANV	Food & Beverage	23.9	-1.65%	1.2	6,364	17.2	3,992	6.0	4.02%	30.3%	Link
BAF	Food & Beverage	36.1	-0.55%	0.6	10,960	39.9	440	82.0	2.99%		Link
SAB	Food & Beverage	47.5	-2.06%	0.5	60,922	30.9	3,754	12.7	58.53%	22.0%	Link
VHC	Food & Beverage	61.2	-1.29%	0.9	13,737	69.7	6,644	9.2	19.28%	15.5%	Link
BMP	Construction & Materials	145.6	0.14%	0.6	11,919	15.7	15,218	9.6	80.42%	41.5%	Link
CTD	Construction & Materials	86.8	0.93%	0.8	9,706	80.9	7,565	11.5	49.00%	9.1%	Link
CTR	Construction & Materials	85.9	-1.60%	0.9	9,826	25.3	5,243	16.4	5.19%		Link
DPG	Construction & Materials	44.8	0.45%	0.8	5,307	43.7	3,127	14.3	19.14%		Link
HHV	Construction & Materials	12.5	0.00%	1.1	6,840	58.1	1,185	10.6	10.26%		Link
PC1	Construction & Materials	19.6	-6.46%	1.0	8,041	824.2	2,532	7.7	16.54%		Link
VCG	Construction & Materials	22.2	0.45%	0.9	14,319	120.6	5,670	3.9	2.19%		Link
VGC	Construction & Materials	42.6	-0.93%	1.2	19,100	32.8	2,896	14.7	1.68%	14.6%	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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