Vietnam Daily Review

CASH FLOW SHOWED BROADER MARKET PARTICIPATION TODAY

Wednesday, 1 July 2026

MARKET OUTLOOK

The VN-Index rose by more than 7 points today and closed at 1,867.21 points. Market breadth skewed positive, with 11 out of 18 sectors advancing. Oil & gas led the gains, followed by information technology, retail, and others. Regarding foreign trading, foreign investors recorded net buying on HSX, while posting net selling on HNX and UPCOM. Today's cash flow showed broader market participation but remained weak. The VN-Index is still fluctuating and testing the SMA50. Investors should continue to maintain a cautious stance until clearer buy/sell signals emerge.

FUTURES CONTRACTS

All VN30 futures contracts increased in line with the VN30 Index.

COVERED WARRANTS

During the trading session on 01/07/2026, most covered warrants moved in line with the rebound of the underlying stocks.

HIGHLIGHT

- VN-Index +7.20 points, closing at 1867.21 points. HNX-Index 0.00 points, closing at 313.16 points.
- Pulling the index up: MCH (+1.93), BSR (+1.45), VCB (+1.44), TCB (+1.23), VPB (+1.20).
- Pulling the index down: VIC (-4.69), VHM (-2.64), VPL (-0.60), LPB (-0.25), STB (-0.24).
- The matched trade value of VN-Index reached VND 13,262 billion, decreased -3.22% compared to the previous session. The total transaction value reached VND 17,232 billion.
- The trading range is 12 points. The market had 195 gainers, 58 remaining unchanged, 121 losers.
- Foreign investors' net buying value: VND 330.11 billion on HOSE, including VPB (VND 302.82 billion), HDB (VND 87.90 billion), VIC (VND 81.10 billion), MCH (VND 60.92 billion), FPT (VND 51.69 billion). Foreign investors were net sellers on HNX with the value of VND -26.96 billion.

BSC30, BSC50 PERFORMANCE

- BSC30 +1.16%. Positive stocks: BSR (+5.38%), FPT (+3.85%), HCM (+3.31%).
- BSC50 +0.32%. Positive stocks: OCB (+3.64%), VTP (+3.31%), NLG (+2.10%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	1.16%	0.32%	0.00%	0.00%
1 week	1.48%	0.80%	-0.58%	0.16%
1 month	-1.52%	-1.26%	-0.39%	-0.45%
3 months	1.70%	-2.76%	9.65%	8.14%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,867.21	313.16	129.57
% 1D	0.39%	0.00%	-0.28%
TV (VND bn)	13,262	601	285
%1D	-3.22%	1.72%	-10.78%
Foreign (VND bn)	330.11	-26.96	-171.54

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VPB	302.82	VHM	-107.35
HDB	87.90	HPG	-56.60
VIC	81.10	VNM	-48.71
MCH	60.92	STB	-33.38
FPT	51.69	GMD	-30.12

Source: FiinPro-X, BSC compiled

Overview of global stock markets

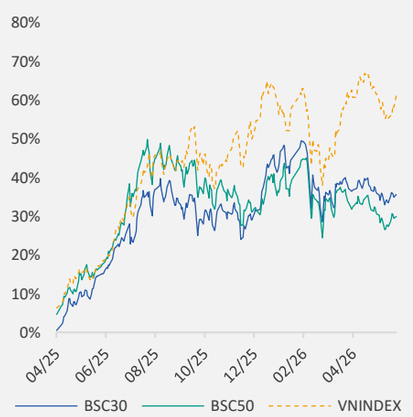
		%D	%W
SPX	7,499	0.79%	1.82%
FTSE100	10,478	-0.18%	0.15%
Eurostoxx	6,317	0.15%	1.67%
Shanghai	4,112	0.44%	0.04%
Nikkei	70,475	0.59%	1.90%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	72.21	-0.97%
Gold	3,976	-0.79%
Exchange rate		
USD/VND	26,307	-0.01%
EUR/VND	29,984	-0.19%
JPY/VND	162	-0.05%
Interst rates		
10Y-Gov bond rate	4.40%	0.00%
1M-interbank rate	7.78%	-0.12%

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)
MCH	140.70	5.00%	1.93	3.39
BSR	25.45	5.38%	1.45	11.74
VCB	63.00	1.29%	1.44	4.49
TCB	34.30	2.39%	1.23	16.33
VPB	27.70	2.59%	1.20	35.95

Top 5 laggards on the HSX

	Close	%Day	Index pt	Volume (mil)
VIC	217.10	-1.32%	-4.69	2.17
VHM	148.70	-2.04%	-2.64	4.40
VPL	88.20	-1.78%	-0.60	0.67
LPB	53.10	-0.75%	-0.25	1.41
STB	73.20	-0.81%	-0.24	3.05

Top 5 leaders on the HNX

	Close	%Day	Index pt	Volume (mil)
BAB	12.10	4.31%	0.36	0.04
PVS	38.90	2.10%	0.27	1.60
KSF	78.70	0.51%	0.23	0.16
MBS	20.40	1.49%	0.20	2.70
SHS	18.80	1.62%	0.18	7.15

Top 5 laggards on the HNX

	Close	%Day	Index pt	Volume (mil)
THD	160.60	-2.01%	-0.80	0.02
NVB	14.30	-1.38%	-0.24	0.95
KSV	154.00	-1.22%	-0.24	0.02
HHC	75.20	-6.23%	-0.05	0.00
PVI	74.20	-0.40%	-0.04	0.02

Top 5 gainers on the HSX

	Close	%Day	Volume (mil)
TNC	32.25	6.97%	0.00
APG	5.07	6.96%	0.28
LAF	25.40	6.95%	0.11
HU1	5.72	6.92%	0.00
LM8	15.80	6.76%	0.00

Top 5 losers on the HSX

	Close	%Day	Volume (mil)
ACC	11.20	-6.67%	0.07
SMA	7.56	-6.67%	0.16
VID	4.65	-6.44%	0.00
CVT	25.70	-5.69%	0.00
HAS	7.71	-5.51%	0.01

Top 5 gainers on the HNX

	Close	%Day	Volume (mil)
CAN	23.10	10.00%	0.00
HDA	7.70	10.00%	0.00
DST	12.50	9.65%	0.84
SHN	5.70	9.62%	0.48
SVN	2.50	8.70%	0.14

Top 5 losers on the HNX

	Close	%Day	Volume (mil)
VDL	10.40	-9.57%	0.00
VLA	8.80	-8.33%	0.00
AMV	1.40	-6.67%	0.43
MBG	2.80	-6.67%	0.98
HJS	26.50	-6.36%	0.00

Figure 1
Sectors performance

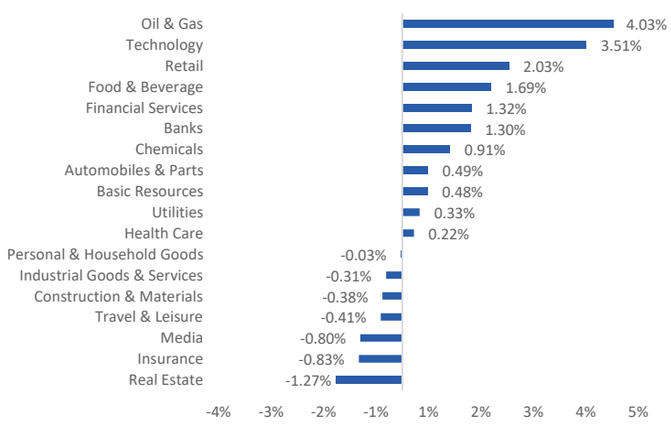
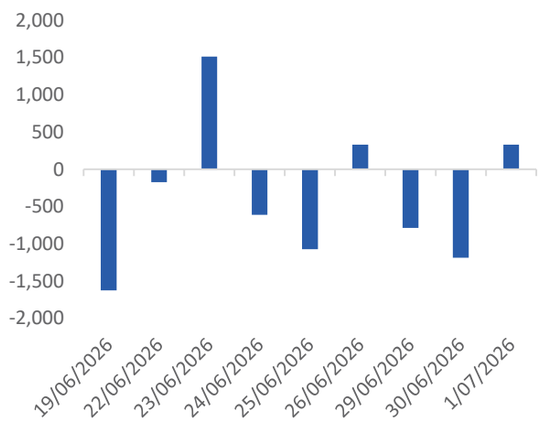


Figure 2
Foreign transactions



Source: FiinPro-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	80.0	2.4%	1.1	114,684	543.4	5,552	14.1	113.0	49.0%	Link
KBC	Real Estate	29.8	-2.3%	1.0	28,724	143.3	1,714	17.8	42.4	7.8%	Link
KDH	Real Estate	21.9	1.2%	1.1	24,240	72.3	1,077	20.1	39.9	24.8%	Link
PDR	Real Estate	14.8	0.3%	1.3	14,718	45.1	607	24.3	28.2	6.1%	Link
VHM	Real Estate	148.7	-2.0%	1.3	623,505	651.4	15,766	9.6	132.6	7.7%	Link
FPT	Technology	72.9	3.9%	0.5	120,346	889.2	5,690	12.3	124.4	27.8%	Link
BSR	Oil & Gas	25.5	5.4%	0.0	120,926	296.5	2,612	9.3	-	1.2%	Link
PVS	Oil & Gas	38.9	2.1%	1.1	19,485	62.1	3,781	10.1	52.3	15.9%	Link
HCM	Financial Services	28.1	3.3%	1.2	29,375	769.7	1,382	19.7		34.2%	Link
SSI	Financial Services	27.2	1.7%	1.2	66,904	317.6	2,153	12.4		31.5%	Link
VCI	Financial Services	24.9	2.3%	1.0	27,945	177.7	1,314	18.5		18.1%	Link
DCM	Chemicals	35.6	1.0%	1.0	18,635	40.6	4,413	8.0	53.3	7.4%	Link
DGC	Chemicals	47.9	0.2%	1.1	18,153	29.5	6,911	6.9	96.7	4.6%	Link
ACB	Banks	22.7	0.0%	0.8	131,470	286.7	2,802	8.1	27.1	24.6%	Link
CTG	Banks	34.4	1.3%	1.0	263,688	251.9	4,906	6.9	53.5	24.7%	Link
HDB	Banks	26.6	2.9%	1.1	129,386	617.2	3,482	7.4	32.7	21.3%	Link
MBB	Banks	25.8	2.2%	0.9	202,986	589.7	3,442	7.3	32.4	22.2%	Link
MSB	Banks	16.0	-1.2%	0.9	50,544	82.7	1,884	8.6	14.0	7.6%	Link
STB	Banks	73.2	-0.8%	0.9	139,129	224.5	2,454	30.1		11.5%	Link
TCB	Banks	34.3	2.4%	1.0	237,389	555.6	3,677	9.1	43.5	21.7%	Link
TPB	Banks	16.8	0.9%	1.0	46,049	430.4	2,661	6.2	-	23.4%	Link
VCB	Banks	63.0	1.3%	0.9	519,723	282.5	4,301	14.5	75.8	20.2%	Link
VIB	Banks	16.6	0.6%	0.7	56,166	310.6	2,231	7.4	23.0	4.2%	Link
VPB	Banks	27.7	2.6%	1.0	214,216	970.9	3,314	8.2	36.5	24.0%	Link
HPG	Basic Resources	23.5	0.6%	1.0	196,721	392.0	2,499	9.3	32.2	21.5%	Link
HSG	Basic Resources	11.8	0.4%	1.0	9,445	27.9	673	17.4	14.3	3.3%	Link
DBC	Food & Beverage	18.5	-0.3%	1.0	7,996	19.3	3,184	5.8	28.8	1.5%	Link
MSN	Food & Beverage	72.5	0.6%	1.1	105,293	478.4	3,267	22.1	100.4	24.7%	Link
VNM	Food & Beverage	55.2	0.7%	0.7	114,530	156.2	4,914	11.2	78.0	48.6%	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 ownership	ROE (%)	Link
DGW	Retail	40.1	-0.25%	1.0	8,891	34.1	2,914	13.8	23.35%	19.2%	Link
FRT	Retail	122.1	1.75%	0.9	21,458	16.2	5,113	23.5	31.63%	25.1%	Link
BVH	Insurance	64.0	-0.93%	1.0	47,954	17.1	3,977	16.3	27.23%	12.1%	Link
DIG	Real Estate	12.6	0.80%	1.1	9,916	25.9	1,003	12.4	1.63%	7.7%	Link
DXG	Real Estate	12.7	0.40%	1.2	16,042	58.4	183	69.1	18.73%	1.7%	Link
HDC	Real Estate	15.1	0.67%	1.1	3,434	8.4	2,441	6.1	1.29%	24.8%	Link
HDG	Real Estate	20.8	0.00%	1.1	8,465	17.4	1,635	12.7	16.89%	10.1%	Link
IDC	Real Estate	41.6	0.24%	1.1	15,749	59.7	4,899	8.5	15.68%	29.2%	Link
NLG	Real Estate	26.7	2.10%	1.0	12,685	43.1	1,599	16.4	40.59%	5.9%	Link
SIP	Real Estate	50.0	-0.60%	0.9	12,178	8.0	5,392	9.3	2.31%	25.6%	Link
SZC	Real Estate	22.8	1.34%	0.9	4,041	6.2	1,309	17.2	1.24%	7.4%	Link
TCH	Real Estate	14.6	0.34%	1.1	13,271	24.6	239	61.0	10.30%	1.8%	Link
VIC	Real Estate	217.1	-1.32%	1.3	1,695,327	476.5	1,506	146.1	3.17%	8.0%	Link
VRE	Real Estate	28.3	-0.70%	1.1	64,761	75.4	3,025	9.4	12.02%	14.6%	Link
CMG	Technology	27.4	1.48%	1.0	6,288	5.3	1,731	15.6	36.59%	12.9%	Link
PLX	Oil & Gas	37.5	1.35%	0.9	46,948	58.9	1,400	26.4	13.96%	7.0%	Link
PVD	Oil & Gas	33.5	1.98%	0.9	18,233	145.3	2,139	15.3	9.61%	7.1%	Link
FTS	Financial Services	26.9	1.32%	1.1	10,119	30.1	1,066	24.9	24.81%	9.2%	Link
MBS	Financial Services	20.4	1.49%	1.2	20,119	54.8	1,760	11.4	0.48%	15.0%	Link
GAS	Utilities	78.0	0.78%	1.1	186,762	58.5	4,808	16.1	2.04%	17.3%	Link
POW	Utilities	14.6	-0.68%	1.2	45,097	213.4	1,122	13.1	4.79%	9.2%	Link
REE	Utilities	49.9	0.50%	0.5	30,927	161.1	4,224	11.8	49.00%	12.8%	Link
VJC	Travel & Leisure	139.3	-0.14%	1.0	107,288	533.3	3,287	42.4	6.31%	10.1%	Link
GEX	Industrial Goods & Services	31.1	-1.11%	1.3	41,151	261.1	1,139	27.6	7.36%	8.8%	Link
GMD	Industrial Goods & Services	74.3	0.95%	1.1	31,390	50.6	4,457	16.5	40.98%	14.6%	Link
HAH	Industrial Goods & Services	51.5	-1.34%	0.9	9,831	28.9	6,750	7.7	10.54%	28.6%	Link
PVT	Industrial Goods & Services	20.2	1.76%	1.0	10,261	51.0	2,211	9.0	12.92%	13.4%	Link
VTP	Industrial Goods & Services	65.5	3.31%	0.8	10,907	32.2	2,933	21.6	3.95%	21.6%	Link
PNJ	Personal & Household Goods	62.7	-0.48%	1.0	32,238	41.1	7,093	8.9	48.18%	28.0%	Link
TCM	Personal & Household Goods	20.1	0.00%	0.9	2,365	22.3	2,181	9.2	48.00%	10.7%	Link
TNG	Personal & Household Goods	19.7	-1.50%	1.0	2,575	6.5	3,269	6.1	22.18%	21.1%	Link
DPM	Chemicals	23.1	0.43%	0.8	15,638	43.4	1,868	12.3	3.82%	11.1%	Link
GVR	Chemicals	33.2	1.07%	1.1	131,200	45.4	1,572	20.9	0.62%	11.0%	Link
EIB	Banks	21.1	0.24%	1.2	39,117	117.1	401	52.3	2.31%	2.9%	Link
LPB	Banks	53.1	-0.75%	0.5	159,820	75.4	3,738	14.3	1.13%	24.7%	Link
NAB	Banks	13.1	-0.76%	0.6	28,496	28.8	2,189	6.0	1.10%	19.7%	Link
OCB	Banks	11.4	3.64%	0.7	33,688	71.4	1,395	7.9	19.70%	12.7%	Link
NKG	Basic Resources	12.1	0.42%	1.1	5,908	10.0	313	38.4	4.45%	2.0%	Link
ANV	Food & Beverage	21.4	0.47%	1.1	5,658	9.6	3,992	5.3	3.32%	30.3%	Link
BAF	Food & Beverage	29.8	0.51%	0.5	10,817	23.1	549	54.0	2.69%	4.7%	Link
SAB	Food & Beverage	48.4	-0.31%	0.5	62,204	18.1	3,754	12.9	58.67%	22.0%	Link
VHC	Food & Beverage	60.0	0.84%	0.9	12,462	8.8	6,662	8.9	18.93%	15.5%	Link
BMP	Construction & Materials	152.9	0.00%	0.4	12,517	11.2	15,218	10.1	81.35%	41.5%	Link
CTD	Construction & Materials	72.5	-0.28%	1.0	8,130	25.6	7,565	9.6	45.69%	9.1%	Link
CTR	Construction & Materials	85.9	1.30%	1.1	9,700	16.0	5,489	15.5	4.28%	29.8%	Link
DPG	Construction & Materials	38.0	-0.26%	1.0	4,518	15.6	3,213	11.9	18.49%	14.3%	Link
HHV	Construction & Materials	11.5	0.44%	0.9	6,238	35.0	1,238	9.2	9.88%	5.8%	Link
PC1	Construction & Materials	22.5	-2.60%	0.9	9,501	74.5	2,838	8.1	9.06%	18.8%	Link
VCG	Construction & Materials	21.0	0.72%	0.9	13,447	101.2	6,432	3.2	1.95%	38.9%	Link
VGC	Construction & Materials	43.9	-2.44%	1.2	20,176	19.7	2,896	15.5	0.98%	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, 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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