

MARKET OUTLOOK

The VN-Index continued to fluctuate above the SMA50 and closed at 1,862.08 points, down slightly by more than 4 points from yesterday. Market breadth skewed negative, with 14 out of 18 sectors declining. Personal & household goods posted the steepest drop of more than 4%, followed by utilities, insurance, chemicals, and others. On the upside, travel & leisure gained more than 1%. Regarding foreign trading, foreign investors recorded net selling on HSX and UPCOM, while posting net buying on HNX. Sideways trading continued to dominate the market. The current positive signal is that the VN-Index still closed above the SMA50. The market trend remains unclear, and investors should continue to trade cautiously during this period.

FUTURES CONTRACTS

VN30 futures contracts declined across the board in line with the VN30 Index.

COVERED WARRANTS

During the trading session on 03/07/2026, most covered warrants decreased.

HIGHLIGHT

- VN-Index **-4.27** points, closing at **1862.08** points. HNX-Index **+0.84** points, closing at **307.57** points.
- Pulling the index up: **HVN (+1.09)**, **VHM (+1.06)**, **VCK (+0.48)**, **MCH (+0.47)**, **VJC (+0.47)**.
- Pulling the index down: **GAS (-1.00)**, **LPB (-0.68)**, **BID (-0.46)**, **VPL (-0.45)**, **PNJ (-0.44)**.
- The matched trade value of VN-Index reached VND **13,960** billion, increased **16.98%** compared to the previous session. The total transaction value reached VND 15,689 billion.
- The trading range is 15.7 points. The market had **107** gainers, 57 remaining unchanged, **202** losers.
- Foreign investors' net selling value: VND **-803.01** billion on HOSE, including **TCB (VND -89.80 billion)**, **MSN (VND -70.54 billion)**, **VIC (VND -63.73 billion)**, **GEX (VND -62.97 billion)**, **MBB (VND -58.49 billion)**. Foreign investors were net buyers on HNX with the value of VND **31.35** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.39%**. Positive stocks: **HDB (+1.32%)**, **VCI (+1.01%)**, **SSI (+0.92%)**.
- BSC50 **-0.92%**. Positive stocks: **MBS (+4.88%)**, **VJC (+2.01%)**, **GMD (+1.46%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.39%	-0.92%	-0.23%	-0.32%
1 week	1.12%	0.26%	-0.53%	-0.30%
1 month	-0.86%	-0.80%	-0.08%	0.28%
3 months	2.06%	-1.20%	10.57%	8.99%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,862.08	307.57	128.01
% 1D	-0.23%	0.27%	-0.51%
TV (VND bn)	13,960	1,565	343
%1D	16.98%	94.84%	14.32%
Foreign (VND bn)	-803.01	31.35	-8.74

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VCK	65.98	TCB	-89.80
VND	51.76	MSN	-70.54
MCH	51.01	VIC	-63.73
FPT	44.57	GEX	-62.97
VPB	39.90	MBB	-58.49

Source: FiinPro-X, BSC compiled

Overview of global stock markets

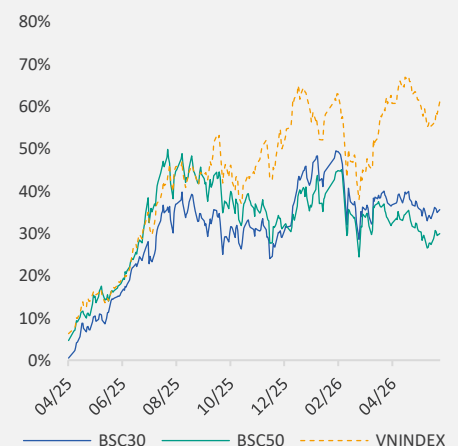
		%D	%W
SPX	7,483	0.00%	1.71%
FTSE100	10,606	-0.44%	0.94%
Eurostoxx	6,376	-0.02%	2.74%
Shanghai	4,044	0.37%	0.41%
Nikkei	69,744	1.47%	0.75%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	71.89	0.13%
Gold	4,176	1.30%
Exchange rate		
USD/VND	26,297	0.02%
EUR/VND	30,106	0.16%
JPY/VND	163	0.10%

Interest rates		
10Y-Gov bond rate	4.40%	0.00%
1M-interbank rate	7.64%	0.14%

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)
HVN	25.30	6.53%	1.09	3.22
VHM	151.60	0.80%	1.06	4.06
VCK	34.20	2.70%	0.48	8.04
MCH	140.40	1.23%	0.47	0.63
VJC	141.80	2.01%	0.47	1.33

Top 5 leaders on the HNX

	Close	%Day	Index pt	Volume (mil)
MBS	21.50	4.88%	0.66	24.49
SHS	19.30	2.66%	0.29	25.63
NVB	14.70	1.38%	0.25	0.57
VIF	16.40	2.50%	0.09	0.01
BVS	31.90	5.63%	0.08	2.16

Top 5 gainers on the HSX

	Close	%Day	Volume (mil)
ORS	14.65	6.93%	23.37
STG	29.60	6.86%	0.00
HU1	6.11	6.82%	0.00
VPS	9.88	6.81%	0.11
TIX	41.00	6.77%	0.00

Top 5 gainers on the HNX

	Close	%Day	Volume (mil)
POT	22.10	9.95%	0.01
SHN	6.80	9.68%	0.62
TSB	22.00	9.45%	0.01
VSM	15.70	9.03%	0.00
APS	7.50	8.70%	2.55

Top 5 laggards on the HSX

	Close	%Day	Index pt	Volume (mil)
GAS	75.30	-2.59%	-1.00	1.65
LPB	51.00	-2.11%	-0.68	2.06
BID	42.25	-0.71%	-0.46	3.91
VPL	85.80	-1.38%	-0.45	0.61
PNJ	58.70	-6.97%	-0.44	1.46

Top 5 laggards on the HNX

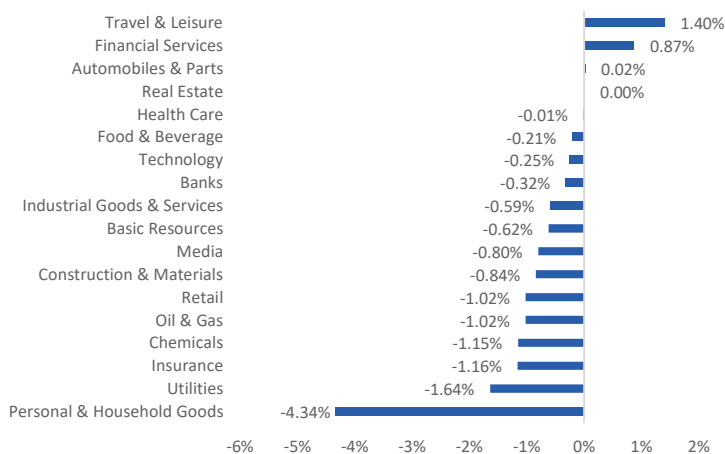
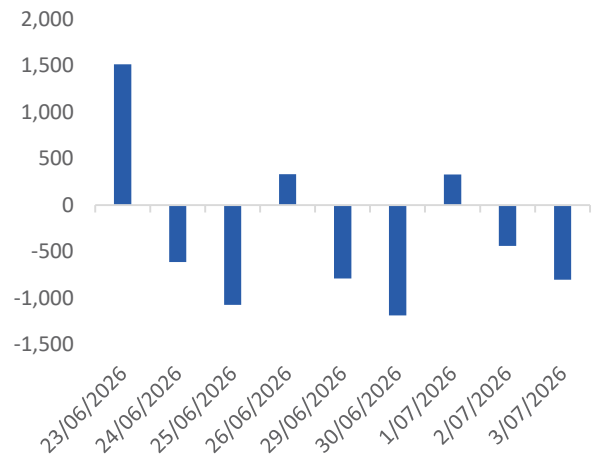
	Close	%Day	Index pt	Volume (mil)
PVI	73.50	-2.00%	-0.22	0.09
IDC	40.70	-2.16%	-0.21	1.26
PVS	38.10	-1.04%	-0.13	1.45
CEO	14.40	-2.04%	-0.11	6.20
PGS	50.00	-5.12%	-0.08	0.00

Top 5 losers on the HSX

	Close	%Day	Volume (mil)
LAF	22.00	-6.98%	0.06
PNJ	58.70	-6.97%	1.46
NVT	7.34	-6.97%	0.00
SC5	15.40	-6.38%	0.01
HAS	7.76	-5.83%	0.02

Top 5 losers on the HNX

	Close	%Day	Volume (mil)
PGN	6.40	-9.86%	0.06
PV2	1.90	-9.52%	0.25
VE3	6.20	-8.82%	0.00
BNA	4.20	-8.70%	0.14
CET	4.30	-8.51%	0.04

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	78.9	-1.0%	1.1	115,859	301.7	5,552	14.2	113.0	49.0%	Link
KBC	Real Estate	29.3	-0.3%	1.3	27,546	51.0	1,714	17.1	42.4	7.7%	Link
KDH	Real Estate	21.3	-1.6%	0.8	23,903	99.5	1,077	19.8	39.9	24.8%	Link
PDR	Real Estate	14.6	-1.4%	1.0	14,518	90.8	607	24.0	28.2	6.1%	Link
VHM	Real Estate	151.6	0.8%	1.6	622,684	621.4	15,766	9.6	132.6	7.6%	Link
FPT	Technology	72.3	-0.3%	0.5	123,946	544.5	5,690	12.7	124.4	27.6%	Link
BSR	Oil & Gas	24.7	-0.8%	0.0	123,680	123.2	2,612	9.5	-	1.1%	Link
PVS	Oil & Gas	38.1	-1.0%	1.1	19,485	60.1	3,781	10.1	52.3	16.0%	Link
HCM	Financial Services	28.6	-1.6%	1.2	30,833	136.5	1,382	20.7		34.2%	Link
SSI	Financial Services	27.4	0.9%	1.2	68,405	548.5	2,152	12.7		31.4%	Link
VCI	Financial Services	25.1	1.0%	0.9	28,921	265.3	1,314	19.1		18.0%	Link
DCM	Chemicals	35.4	-0.1%	0.4	18,714	63.9	4,413	8.0	53.3	7.0%	Link
DGC	Chemicals	47.7	-1.2%	0.6	18,115	22.4	6,819	7.0	96.7	4.6%	Link
ACB	Banks	22.7	0.0%	0.6	131,470	241.2	2,802	8.1	27.1	24.6%	Link
CTG	Banks	34.2	-0.3%	0.9	265,241	246.6	4,906	7.0	53.5	24.7%	Link
HDB	Banks	27.0	1.3%	1.1	134,892	470.8	3,482	7.7	32.7	21.4%	Link
MBB	Banks	25.6	-0.2%	0.8	206,208	347.2	3,442	7.4	32.4	22.2%	Link
MSB	Banks	16.0	0.3%	0.8	49,920	142.8	1,884	8.5	14.0	7.6%	Link
STB	Banks	72.0	-0.8%	0.8	135,736	191.2	2,454	29.3		11.5%	Link
TCB	Banks	33.6	-0.7%	1.1	238,098	545.8	3,677	9.1	43.5	21.6%	Link
TPB	Banks	16.6	0.3%	0.9	45,910	122.3	2,661	6.2	-	23.4%	Link
VCB	Banks	62.0	-0.2%	0.8	518,052	162.2	4,301	14.4	75.8	20.2%	Link
VIB	Banks	16.5	-1.2%	0.7	55,996	236.0	2,231	7.4	23.0	4.2%	Link
VPB	Banks	27.8	0.4%	1.3	220,563	584.4	3,314	8.4	36.5	23.9%	Link
HPG	Basic Resources	23.3	-0.6%	0.7	196,299	374.7	2,499	9.3	32.2	21.4%	Link
HSG	Basic Resources	11.6	-0.4%	0.9	9,324	31.2	679	17.0	14.3	3.3%	Link
DBC	Food & Beverage	18.5	-0.5%	0.7	7,974	18.4	3,184	5.8	28.8	1.5%	Link
MSN	Food & Beverage	71.8	-0.8%	1.1	104,855	195.5	3,267	22.0	100.4	24.6%	Link
VNM	Food & Beverage	54.9	-1.1%	0.5	114,739	234.9	4,914	11.2	78.0	48.4%	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	40.3	0.12%	1.1	8,902	24.6	2,914	13.8	23.34%	19.2%	Link
FRT	Retail	120.4	-1.31%	0.9	21,530	58.9	5,113	23.6	31.61%	25.1%	Link
BVH	Insurance	62.3	-1.58%	0.7	46,247	18.6	3,977	15.7	27.22%	12.1%	Link
DIG	Real Estate	12.3	-1.61%	1.0	9,756	65.8	1,003	12.2	1.62%	7.7%	Link
DXG	Real Estate	12.2	-1.62%	1.1	15,407	186.3	183	66.3	18.65%	1.7%	Link
HDC	Real Estate	15.0	-0.33%	1.0	3,434	17.8	2,441	6.1	1.15%	24.8%	Link
HDG	Real Estate	20.0	-3.38%	0.8	8,139	74.1	1,635	12.2	16.86%	10.1%	Link
IDC	Real Estate	40.7	-2.16%	1.1	15,446	71.7	4,899	8.3	15.68%	29.2%	Link
NLG	Real Estate	25.8	-1.90%	0.7	12,516	40.9	1,599	16.1	40.66%	5.9%	Link
SIP	Real Estate	50.0	-0.10%	0.8	12,094	7.5	5,392	9.3	2.31%	25.6%	Link
SZC	Real Estate	22.2	-1.55%	1.0	3,996	9.4	1,309	17.0	1.24%	7.4%	Link
TCH	Real Estate	14.3	-0.69%	0.9	13,043	74.1	259	55.2	10.28%	1.9%	Link
VIC	Real Estate	220.3	0.00%	1.4	1,697,639	461.9	1,506	146.3	3.18%	8.0%	Link
VRE	Real Estate	28.2	0.00%	1.5	63,966	87.2	3,025	9.3	12.00%	14.6%	Link
CMG	Technology	27.3	-0.18%	0.8	6,347	3.4	1,774	15.4	36.59%	13.2%	Link
PLX	Oil & Gas	36.6	-1.75%	0.9	46,440	76.4	1,400	26.1	13.96%	7.0%	Link
PVD	Oil & Gas	32.6	-0.61%	0.8	18,094	77.6	2,139	15.2	9.73%	7.1%	Link
FTS	Financial Services	28.0	0.36%	0.9	10,672	83.8	1,066	26.3	24.76%	9.2%	Link
MBS	Financial Services	21.5	4.88%	1.1	21,520	521.4	1,753	12.3	0.44%	15.0%	Link
GAS	Utilities	75.3	-2.59%	0.9	181,695	126.0	4,808	15.7	2.04%	17.3%	Link
POW	Utilities	14.9	0.00%	1.1	45,711	194.3	1,122	13.3	4.79%	9.2%	Link
REE	Utilities	48.8	-1.71%	0.4	30,397	36.1	4,224	11.6	49.00%	12.8%	Link
VJC	Travel & Leisure	141.8	2.01%	0.9	109,057	186.0	3,287	43.1	6.30%	10.1%	Link
GEX	Industrial Goods & Services	30.6	-1.29%	1.6	39,974	369.0	1,139	26.8	7.34%	8.8%	Link
GMD	Industrial Goods & Services	76.4	1.46%	1.0	32,584	336.2	4,457	17.1	40.78%	14.6%	Link
HAH	Industrial Goods & Services	51.9	0.78%	0.8	9,775	15.4	6,750	7.7	10.29%	28.6%	Link
PVT	Industrial Goods & Services	19.8	-2.22%	0.7	10,235	54.9	2,211	9.0	12.99%	13.4%	Link
VTP	Industrial Goods & Services	63.9	-1.69%	0.6	10,993	11.7	2,924	21.9	3.94%	21.6%	Link
PNJ	Personal & Household Goods	58.7	-6.97%	0.9	30,038	85.9	7,093	8.3	48.24%	28.0%	Link
TCM	Personal & Household Goods	20.1	-0.74%	0.8	2,365	8.9	2,181	9.2	48.02%	10.7%	Link
TNG	Personal & Household Goods	19.4	-1.02%	1.0	2,497	10.4	3,269	5.9	22.18%	21.1%	Link
DPM	Chemicals	22.9	-0.22%	0.5	15,536	45.0	1,868	12.2	3.79%	11.1%	Link
GVR	Chemicals	32.5	-1.52%	1.7	130,000	48.6	1,572	20.7	0.62%	11.0%	Link
EIB	Banks	20.7	-1.20%	1.3	38,465	409.0	401	51.5	2.29%	2.9%	Link
LPB	Banks	51.0	-2.11%	0.7	152,351	105.6	3,738	13.6	1.13%	24.7%	Link
NAB	Banks	13.1	0.00%	0.6	28,281	30.6	2,188	6.0	1.12%	19.7%	Link
OCB	Banks	11.5	0.44%	0.6	35,219	38.7	1,395	8.2	19.64%	12.7%	Link
NKG	Basic Resources	12.0	0.84%	1.0	5,908	14.7	313	38.4	4.45%	2.0%	Link
ANV	Food & Beverage	21.0	-2.56%	1.1	5,578	15.7	3,992	5.3	3.23%	30.3%	Link
BAF	Food & Beverage	30.0	0.33%	0.5	10,945	15.3	549	54.7	2.65%	4.7%	Link
SAB	Food & Beverage	47.9	-1.44%	0.4	61,435	38.7	3,754	12.8	58.66%	22.0%	Link
VHC	Food & Beverage	59.3	-1.17%	0.9	12,421	10.9	6,662	8.9	18.91%	15.5%	Link
BMP	Construction & Materials	153.6	-0.58%	0.6	12,574	13.3	15,218	10.1	81.46%	41.5%	Link
CTD	Construction & Materials	72.0	0.00%	0.7	8,051	34.9	7,565	9.5	45.78%	9.1%	Link
CTR	Construction & Materials	85.8	0.00%	0.8	9,814	16.8	5,489	15.6	4.28%	29.8%	Link
DPG	Construction & Materials	35.6	-4.30%	0.6	4,222	39.4	3,213	11.1	18.49%	14.3%	Link
HHV	Construction & Materials	11.3	-0.88%	0.9	6,183	37.0	1,238	9.1	9.79%	5.8%	Link
PC1	Construction & Materials	22.0	-1.79%	0.8	9,048	70.3	2,838	7.8	9.02%	18.8%	Link
VCG	Construction & Materials	20.7	-2.13%	0.8	13,382	92.7	6,432	3.2	2.03%	38.9%	Link
VGC	Construction & Materials	43.5	-0.11%	1.1	19,481	12.3	2,896	15.0	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, 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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