

MARKET OUTLOOK

The VN-Index fell sharply by nearly 28 points today and closed at 1,800.54 points. Market breadth skewed negative, with all 18 out of 18 sectors declining. Media led the losses, followed by personal & household goods, automobiles & parts, among others. Regarding foreign trading, foreign investors recorded net selling on HSX and UPCOM, while posting net buying on HNX. Although bottom-fishing demand emerged around the 1,780 level, helping the VN-Index narrow its losses, today’s sharp decline still poses risks for the upcoming sessions. Investors should continue to maintain a cautious trading stance.

FUTURES CONTRACTS

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

COVERED WARRANTS

During the trading session on 13/07/2026, most covered warrants decreased.

HIGHLIGHT

- VN-Index **-27.80** points, closing at **1800.54** points. HNX-Index **-11.86** points, closing at **291.9** points.
- Pulling the index up: **BSR (+0.27)**, **VPL (+0.23)**, **CRV (+0.23)**, **MSB (+0.14)**, **GAS (+0.11)**.
- Pulling the index down: **VHM (-3.43)**, **VCB (-2.79)**, **VIC (-2.47)**, **CTG (-1.77)**, **BID (-1.60)**.
- The matched trade value of VN-Index reached VND **17,990** billion, increased **40.95%** compared to the previous session. The total transaction value reached VND 21,847 billion.
- The trading range is 48.05 points. The market had **52** gainers, 48 remaining unchanged, **271** losers.
- Foreign investors' net selling value: VND **-261.45** billion on HOSE, including **CTG (VND -120.08 billion)**, **HPG (VND -109.12 billion)**, **VPB (VND -100.58 billion)**, **VCB (VND -92.26 billion)**, **FPT (VND -76.43 billion)**. Foreign investors were net buyers on HNX with the value of VND **2.83** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-1.41%**. Positive stocks: **PVS (+2.21%)**, **MSB (+1.27%)**, **BSR (+0.98%)**.
- BSC50 **-1.55%**. Positive stocks: **DIG (+2.85%)**, **BMP (+1.71%)**, **NLG (+1.40%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-1.41%	-1.55%	-1.52%	-1.57%
1 week	-2.14%	-2.15%	-2.33%	-2.57%
1 month	-1.65%	-2.85%	0.56%	0.16%
3 months	-5.36%	-9.02%	2.36%	0.74%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,800.54	291.90	126.49
% 1D	-1.52%	-3.90%	-1.43%
TV (VND bn)	17,990	1,654	342
%1D	40.95%	74.99%	15.97%
Foreign (VND bn)	-261.45	2.83	-0.38

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VHM	129.23	CTG	-120.08
MBB	81.95	HPG	-109.12
HDB	58.92	VPB	-100.58
GMD	56.59	VCB	-92.26
VIC	49.56	FPT	-76.43

Source: FiinPro-X, BSC compiled

Overview of global stock markets

		%D	%W
SPX	7,575	0.42%	1.23%
FTSE100	10,498	0.01%	-1.44%
Eurostoxx	6,268	0.07%	-1.98%
Shanghai	3,914	-2.06%	-3.15%
Nikkei	67,243	-1.92%	-3.42%

Source: Vietstock.vn, BSC compiled

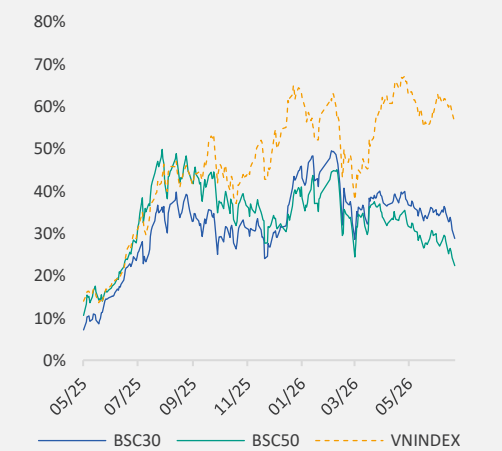
	Close	%
Commodities		
Brent	77.73	2.26%
Gold	4,074	-1.12%

Exchange rate		
USD/VND	26,259	-0.04%
EUR/VND	30,030	0.15%
JPY/VND	162	-0.25%

Interest rates		
10Y-Gov bond rate	4.40%	0.00%
1M-interbank rate	0.00%	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)
BSR	25.75	0.98%	0.27	8.52
VPL	82.90	0.73%	0.23	0.85
CRV	25.50	6.03%	0.23	0.00
MSB	16.00	1.27%	0.14	20.73
GAS	75.40	0.27%	0.11	0.91

Top 5 leaders on the HNX

	Close	%Day	Index pt	Volume (mil)
PVS	37.00	2.21%	0.27	3.19
SHN	7.90	9.72%	0.06	0.97
MST	10.00	5.26%	0.04	2.84
SAF	55.50	8.82%	0.04	0.00
SHE	7.20	9.09%	0.03	0.00

Top 5 gainers on the HSX

	Close	%Day	Volume (mil)
ABS	3.23	6.95%	1.68
PGI	18.15	6.76%	0.00
TNC	32.00	6.67%	0.00
TNI	5.92	6.67%	2.17
VID	5.00	6.38%	0.00

Top 5 gainers on the HNX

	Close	%Day	Volume (mil)
SHN	7.90	9.72%	0.97
SHE	7.20	9.09%	0.00
SAF	55.50	8.82%	0.00
PJC	32.50	8.33%	0.00
SVN	3.00	7.14%	0.84

Top 5 laggards on the HSX

	Close	%Day	Index pt	Volume (mil)
VHM	143.00	-2.72%	-3.43	6.11
VCB	58.90	-2.64%	-2.79	6.81
VIC	221.50	-0.67%	-2.47	3.81
CTG	32.60	-3.26%	-1.77	17.33
BID	39.95	-2.56%	-1.60	6.07

Top 5 laggards on the HNX

	Close	%Day	Index pt	Volume (mil)
THD	136.60	-8.93%	-3.06	0.02
KSF	75.90	-1.94%	-0.86	0.19
NVB	13.10	-5.07%	-0.83	1.02
MBS	20.80	-4.59%	-0.62	20.37
BAB	11.10	-7.50%	-0.58	0.08

Top 5 losers on the HSX

	Close	%Day	Volume (mil)
TDC	8.37	-7.00%	3.20
PJT	8.93	-6.98%	0.00
GIL	9.91	-6.95%	0.12
BCE	7.38	-6.94%	0.20
VVS	76.70	-6.92%	0.37

Top 5 losers on the HNX

	Close	%Day	Volume (mil)
PGN	5.40	-10.00%	0.06
VNT	22.10	-9.80%	0.00
NAP	9.30	-9.71%	0.00
TKU	12.40	-9.49%	0.00
HTC	33.40	-9.49%	0.00

Figure 1
Sectors performance

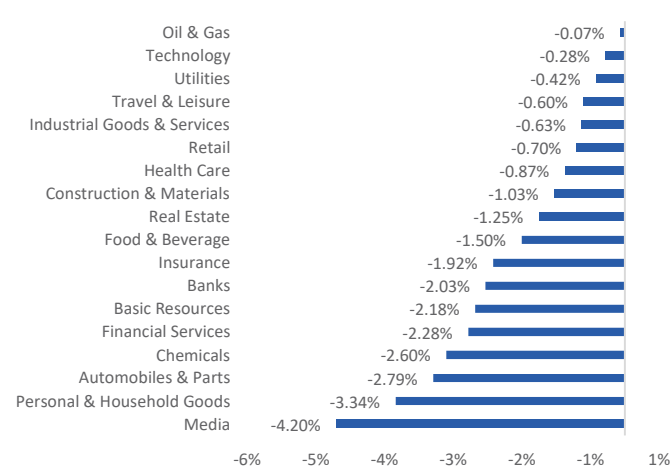
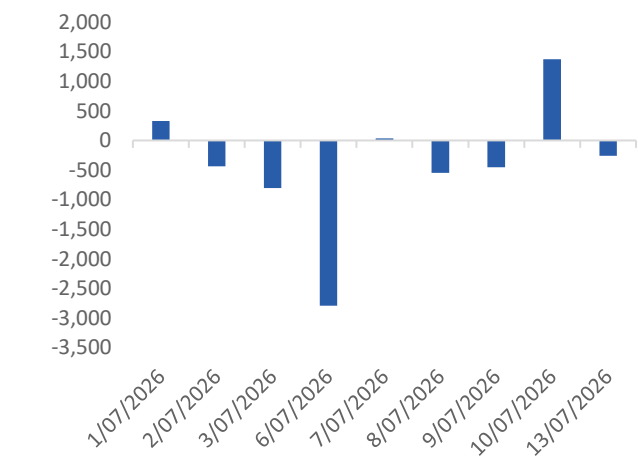


Figure 2
Foreign transactions



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	76.0	-0.8%	1.0	111,600	291.5	5,552	13.7	113.0	49.0%	Link
KBC	Real Estate	28.3	-1.2%	1.1	26,605	230.5	1,714	16.5	42.4	7.6%	Link
KDH	Real Estate	19.8	-2.5%	0.9	22,220	131.3	1,077	18.4	39.9	24.9%	Link
PDR	Real Estate	13.8	-1.8%	1.0	13,770	131.7	607	22.7	28.2	6.4%	Link
VHM	Real Estate	143.0	-2.7%	1.8	587,360	872.0	15,766	9.1	132.6	7.5%	Link
FPT	Technology	70.5	-0.1%	0.6	120,860	583.0	5,689	12.4	124.4	27.7%	Link
BSR	Oil & Gas	25.8	1.0%	0.0	128,938	221.5	2,612	9.9	-	1.1%	Link
PVS	Oil & Gas	37.0	2.2%	1.0	18,923	117.2	3,781	9.8	52.3	15.7%	Link
HCM	Financial Services	27.6	-0.7%	1.1	29,807	234.0	1,382	20.0		34.4%	Link
SSI	Financial Services	25.7	-3.4%	1.0	64,153	907.0	2,152	11.9		31.2%	Link
VCI	Financial Services	23.7	-3.1%	0.8	27,308	284.2	1,314	18.0		18.1%	Link
DCM	Chemicals	32.6	-0.8%	0.8	17,232	73.4	4,413	7.4	53.3	6.7%	Link
DGC	Chemicals	45.3	-2.0%	0.7	17,204	20.5	6,819	6.6	96.7	4.5%	Link
ACB	Banks	22.5	-0.4%	0.7	130,309	346.8	2,802	8.0	27.1	24.5%	Link
CTG	Banks	32.6	-3.3%	1.0	253,202	569.9	4,906	6.7	53.5	24.7%	Link
HDB	Banks	26.7	-1.1%	1.1	133,641	600.4	3,482	7.7	32.7	21.5%	Link
MBB	Banks	24.5	-0.8%	0.9	196,945	413.5	3,442	7.1	32.4	22.2%	Link
MSB	Banks	16.0	1.3%	0.9	49,920	316.1	1,884	8.5	14.0	7.6%	Link
STB	Banks	68.5	-2.3%	0.6	129,137	333.2	2,454	27.9		11.4%	Link
TCB	Banks	32.4	-0.2%	1.1	229,240	640.0	3,677	8.8	43.5	21.5%	Link
TPB	Banks	15.6	-2.5%	1.0	43,136	235.1	2,661	5.8	-	23.4%	Link
VCB	Banks	58.9	-2.6%	0.7	492,149	404.5	4,301	13.7	75.8	20.2%	Link
VIB	Banks	15.5	-2.8%	0.7	52,762	190.0	2,231	7.0	23.0	3.9%	Link
VPB	Banks	26.4	-1.1%	1.1	209,456	574.0	3,314	8.0	36.5	23.9%	Link
HPG	Basic Resources	22.4	-2.4%	0.7	189,122	732.6	2,499	9.0	32.2	21.3%	Link
HSG	Basic Resources	11.3	-0.9%	0.7	9,082	40.2	679	16.6	14.3	3.2%	Link
DBC	Food & Beverage	16.9	-2.6%	0.7	7,285	142.7	3,184	5.3	28.8	1.4%	Link
MSN	Food & Beverage	67.9	-1.3%	1.0	99,159	374.3	3,266	20.8	100.4	23.9%	Link
VNM	Food & Beverage	55.4	-2.1%	0.5	115,784	109.6	4,914	11.3	78.0	48.7%	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	38.6	0.13%	1.0	8,526	30.9	2,914	13.2	22.96%	19.2%	Link
FRT	Retail	113.3	-0.53%	0.8	20,260	25.1	5,113	22.2	31.31%	25.1%	Link
BVH	Insurance	57.5	-2.54%	1.0	42,684	22.7	3,977	14.5	27.20%	12.1%	Link
DIG	Real Estate	12.7	2.85%	0.8	10,075	154.5	1,003	12.6	1.82%	7.7%	Link
DXG	Real Estate	12.1	0.41%	0.9	15,344	110.2	183	66.1	18.83%	1.7%	Link
HDC	Real Estate	14.4	-2.05%	0.8	3,296	24.8	2,441	5.9	1.15%	24.8%	Link
HDG	Real Estate	18.9	0.00%	0.8	7,691	33.5	1,635	11.6	16.69%	10.1%	Link
IDC	Real Estate	37.6	-4.33%	1.0	14,269	82.4	4,899	7.7	15.61%	29.2%	Link
NLG	Real Estate	25.4	1.40%	0.7	12,297	44.4	1,599	15.9	40.46%	5.9%	Link
SIP	Real Estate	49.3	-0.71%	0.9	11,924	4.6	5,392	9.1	2.31%	25.6%	Link
SZC	Real Estate	20.6	-2.14%	0.9	3,699	7.7	1,309	15.7	1.26%	7.4%	Link
TCH	Real Estate	13.8	1.10%	1.0	12,587	58.8	259	53.3	10.12%	1.9%	Link
VIC	Real Estate	221.5	-0.67%	1.7	1,719,324	843.2	1,506	147.1	3.15%	8.0%	Link
VRE	Real Estate	25.9	-1.71%	1.4	58,853	146.9	3,025	8.6	11.92%	14.6%	Link
CMG	Technology	26.5	-2.04%	0.9	6,160	6.8	1,774	14.9	36.55%	13.2%	Link
PLX	Oil & Gas	35.6	-1.25%	0.9	45,170	60.5	1,400	25.4	13.96%	7.0%	Link
PVD	Oil & Gas	31.1	-4.46%	1.0	17,260	137.7	2,139	14.5	9.82%	7.1%	Link
FTS	Financial Services	25.8	-4.10%	1.0	9,815	82.8	1,066	24.2	24.74%	9.2%	Link
MBS	Financial Services	20.8	-4.59%	1.1	20,819	428.1	1,729	12.0	0.44%	15.0%	Link
GAS	Utilities	75.4	0.27%	1.0	181,936	69.4	4,808	15.7	2.04%	17.3%	Link
POW	Utilities	13.8	-2.13%	0.9	42,336	427.5	1,122	12.3	4.68%	9.2%	Link
REE	Utilities	46.2	-1.81%	0.3	28,747	30.2	4,224	10.9	49.00%	12.8%	Link
VJC	Travel & Leisure	134.4	-2.61%	0.6	103,366	645.9	3,287	40.9	6.29%	10.1%	Link
GEX	Industrial Goods & Services	26.0	-2.26%	0.9	34,020	358.2	1,139	22.8	7.05%	8.8%	Link
GMD	Industrial Goods & Services	75.3	0.00%	0.8	32,115	356.0	4,457	16.9	40.36%	14.6%	Link
HAH	Industrial Goods & Services	50.8	-1.36%	0.5	9,568	31.5	6,747	7.5	9.83%	28.6%	Link
PVT	Industrial Goods & Services	19.0	0.26%	0.8	9,796	46.9	2,211	8.6	12.63%	13.4%	Link
VTP	Industrial Goods & Services	61.4	-2.85%	0.6	10,563	22.6	2,892	21.2	3.93%	21.6%	Link
PNJ	Personal & Household Goods	43.9	-5.90%	0.7	22,439	490.6	7,093	6.2	47.19%	28.0%	Link
TCM	Personal & Household Goods	20.1	0.00%	0.7	2,359	22.1	2,181	9.2	48.06%	10.7%	Link
TNG	Personal & Household Goods	18.2	-2.15%	0.9	2,343	13.4	3,269	5.6	22.08%	21.1%	Link
DPM	Chemicals	23.4	0.00%	0.8	15,910	82.4	1,868	12.5	3.69%	11.1%	Link
GVR	Chemicals	29.5	-3.59%	1.6	118,000	59.4	1,572	18.8	0.62%	11.0%	Link
EIB	Banks	19.4	-2.03%	1.0	36,044	213.1	401	48.2	2.12%	2.9%	Link
LPB	Banks	51.6	-3.37%	1.0	154,144	114.9	3,738	13.8	1.12%	24.7%	Link
NAB	Banks	13.0	-2.63%	0.6	27,957	34.8	2,186	5.9	1.20%	19.7%	Link
OCB	Banks	10.9	-2.25%	0.7	33,228	74.4	1,395	7.8	19.61%	12.7%	Link
NKG	Basic Resources	11.7	-2.09%	0.7	5,760	23.0	313	37.4	4.49%	2.0%	Link
ANV	Food & Beverage	18.9	-3.83%	1.0	5,019	14.8	3,992	4.7	2.88%	30.3%	Link
BAF	Food & Beverage	29.8	-0.83%	0.4	10,872	50.2	549	54.3	2.87%	4.7%	Link
SAB	Food & Beverage	46.2	-2.12%	0.6	59,190	42.0	3,754	12.3	58.64%	22.0%	Link
VHC	Food & Beverage	57.0	-0.87%	0.8	11,939	24.4	6,662	8.6	18.94%	15.5%	Link
BMP	Construction & Materials	148.6	1.71%	0.2	12,165	26.7	15,218	9.8	81.51%	41.5%	Link
CTD	Construction & Materials	67.6	-1.74%	0.7	7,559	53.6	7,565	8.9	46.53%	9.1%	Link
CTR	Construction & Materials	73.8	-0.27%	0.8	9,455	23.8	4,901	15.1	4.35%	29.8%	Link
DPG	Construction & Materials	33.0	-2.37%	0.7	3,913	13.1	3,213	10.3	18.62%	14.3%	Link
HHV	Construction & Materials	10.5	-2.34%	0.9	6,004	41.4	1,173	8.9	9.80%	5.8%	Link
PC1	Construction & Materials	21.3	0.00%	0.8	8,740	38.2	2,838	7.5	8.62%	18.8%	Link
VCG	Construction & Materials	19.8	-2.46%	0.7	12,800	113.5	6,432	3.1	2.28%	38.9%	Link
VGC	Construction & Materials	41.8	-0.48%	0.9	18,741	13.0	2,896	14.4	0.94%	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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