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Vietnam Daily Review

THE MARKET ATTEMPTED TO BREAK ABOVE THE 1,700-POINT THRESHOLD BUT FAILED

Monday, 27 July 2026

MARKET OUTLOOK

The VN-Index extended its decline by more than 17 points today, closing at 1,669.01. Market breadth remained negative, with 13 out of 18 sectors falling. Retail posted the steepest decline, followed by Financial Services. In contrast, Personal & Household Goods recorded a positive session. Foreign investors were net sellers across all three exchanges—HSX, HNX, and UPCOM. The market attempted to break above the 1,700-point threshold but failed. It may need more time to stabilize its trading range and establish a tighter consolidation base.

FUTURES CONTRACTS

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

COVERED WARRANTS

During the trading session on 27/07/2026, most covered warrants moved in line with the correction of the underlying stocks.

HIGHLIGHT

- VN-Index -17.10 points, closing at 1669.01 points. HNX-Index -3.64 points, closing at 269.35 points.
- Pulling the index up: LPB (+1.05), VHM (+0.88), MCH (+0.71), VIC (+0.67), PNJ (+0.25).
- Pulling the index down: BID (-1.94), MWG (-1.38), TCX (-0.96), HPG (-0.79), VPB (-0.66).
- The matched trade value of VN-Index reached VND 12,319 billion, increased 3.41% compared to the previous session. The total transaction value reached VND 14,649 billion.
- The trading range is 31.68 points. The market had 79 gainers, 37 remaining unchanged, 258 losers.
- Foreign investors' net selling value: VND -741.13 billion on HOSE, including VPB (VND -95.83 billion), TCB (VND -71.68 billion), SHB (VND -71.31 billion), VHM (VND -68.62 billion), SSI (VND -63.11 billion). Foreign investors were net sellers on HNX with the value of VND -44.57 billion.

BSC30, BSC50 PERFORMANCE

- BSC30 -2.25%. Positive stocks: VHM (+0.77%).
- BSC50 -2.18%. Positive stocks: PNJ (+6.99%), LPB (+3.05%), PC1 (+2.61%).

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-2.25%	-2.18%	-1.01%	-1.25%
1 week	-8.29%	-8.96%	-6.63%	-6.48%
1 month	-11.63%	-15.18%	-8.52%	-8.00%
3 months	-12.93%	-17.76%	-9.94%	-10.19%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,669.01	269.35	126.26
% 1D	-1.01%	-1.33%	0.29%
TV (VND bn)	12,319	842	221
%1D	3.41%	16.25%	-16.46%
Foreign (VND bn)	-741.13	-44.57	-3.79

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
LPB	69.51	VPB	-95.83
MBB	56.36	TCB	-71.68
FRT	29.57	SHB	-71.31
MCH	17.45	VHM	-68.62
VSC	16.80	SSI	-63.11

Source: FiinPro-X, BSC compiled

Overview of global stock markets

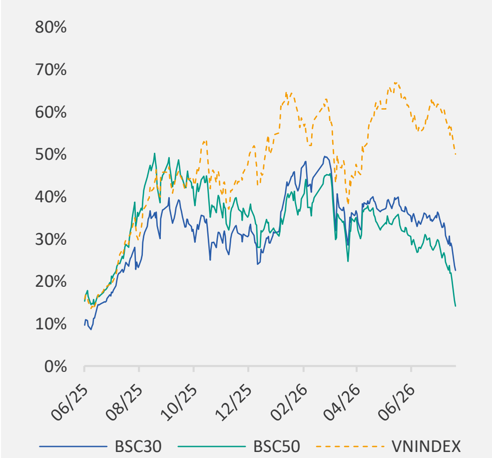
		%D	%W
SPX	7,412	0.05%	-0.61%
FTSE100	10,783	0.44%	2.46%
Eurostoxx	6,358	1.23%	2.10%
Shanghai	3,858	1.15%	1.63%
Nikkei	64,931	0.50%	1.23%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	89.08	-7.96%
Gold	4,095	1.05%
Exchange rate		
USD/VND	26,315	-0.03%
EUR/VND	29,996	0.20%
JPY/VND	161	0.16%
Interst rates		
10Y-Gov bond rate	4.41%	0.00%
1M-interbank rate	6.65%	0.38%

Source: FiinPro-X, BSC compiled

Performances of BSC30, BSC50



Source: BSC

Contents

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%Day	Index pt	Volume (mil)
LPB	54.00	3.05%	1.05	5.57
VHM	131.00	0.77%	0.88	6.72
MCH	137.50	1.85%	0.71	0.55
VIC	213.50	0.19%	0.67	2.92
PNJ	32.90	6.99%	0.25	10.32

Top 5 laggards on the HSX

	Close	%Day	Index pt	Volume (mil)
BID	34.70	-3.61%	-1.94	3.57
MWG	63.30	-6.91%	-1.38	7.73
TCX	37.50	-4.34%	-0.96	1.03
HPG	20.35	-2.16%	-0.79	18.22
VPB	24.55	-1.60%	-0.66	13.38

Top 5 leaders on the HNX

	Close	%Day	Index pt	Volume (mil)
KSF	77.80	1.04%	0.45	0.15
THD	124.00	0.81%	0.24	0.00
PGS	59.00	7.66%	0.14	0.00
VIF	15.50	4.03%	0.14	0.01
MVB	17.40	4.82%	0.05	

Top 5 laggards on the HNX

	Close	%Day	Index pt	Volume (mil)
MBS	17.40	-6.45%	-0.70	7.96
SHS	14.30	-5.92%	-0.47	12.19
IDC	31.50	-5.41%	-0.40	1.31
PVS	33.30	-2.63%	-0.28	2.73
CEO	10.80	-6.90%	-0.28	7.76

Top 5 gainers on the HSX

	Close	%Day	Volume (mil)
PNJ	32.90	6.99%	10.32
ASP	10.85	6.90%	0.50
STG	32.95	6.81%	0.00
HAS	8.33	6.79%	0.01
HTV	13.80	6.15%	0.03

Top 5 losers on the HSX

	Close	%Day	Volume (mil)
CII	12.65	-6.99%	12.31
PJT	8.26	-6.98%	0.00
CTS	20.00	-6.98%	3.20
CSV	20.00	-6.98%	0.55
VND	15.35	-6.97%	15.58

Top 5 gainers on the HNX

	Close	%Day	Volume (mil)
VCM	7.90	9.72%	0.00
DS3	4.90	8.89%	0.00
VTC	11.90	8.18%	0.00
PPE	15.90	8.16%	0.00
HMR	10.80	8.00%	0.00

Top 5 losers on the HNX

	Close	%Day	Volume (mil)
VC1	12.60	-10.00%	0.00
VIT	25.40	-9.93%	0.00
CKV	13.00	-9.72%	0.00
MIC	9.30	-9.71%	0.00
BTW	54.30	-9.65%	0.00

Figure 1
Sectors performance

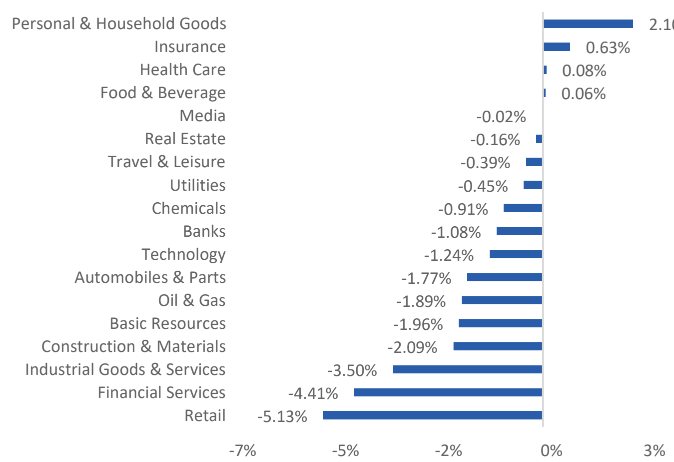
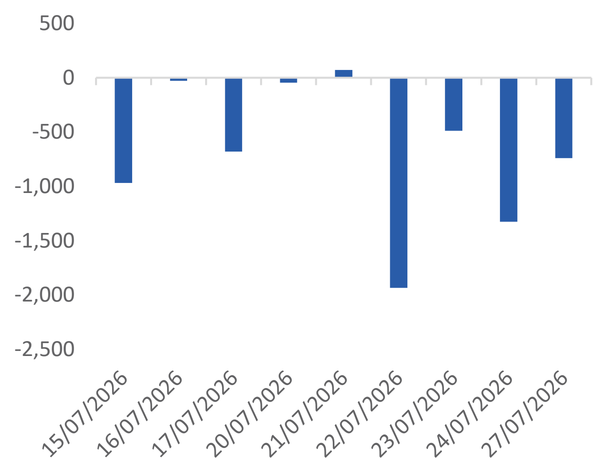


Figure 2
Foreign transactions



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	63.3	-6.9%	1.1	93,416	508.7	5,551	11.4	113.0	49.0%	Link
KBC	Real Estate	27.7	-0.5%	1.1	26,087	33.2	1,714	16.2	42.4	7.4%	Link
KDH	Real Estate	16.4	-5.8%	1.0	18,404	161.1	1,077	15.2	39.9	24.8%	Link
PDR	Real Estate	11.2	-6.7%	1.0	11,126	66.6	607	18.4	28.2	6.8%	Link
VHM	Real Estate	131.0	0.8%	1.8	538,071	878.9	15,766	8.3	132.6	7.5%	Link
FPT	Technology	62.2	-1.1%	0.6	106,631	281.5	5,688	10.9	124.4	27.0%	Link
BSR	Oil & Gas	23.7	-1.3%	0.0	118,673	205.0	2,612	9.1	-	1.1%	Link
PVS	Oil & Gas	33.3	-2.6%	1.0	17,030	92.3	3,781	8.8	52.3	15.7%	Link
HCM	Financial Services	25.0	-2.3%	1.0	33,749	115.1	1,326	18.9		34.3%	Link
SSI	Financial Services	22.0	-3.5%	1.1	55,024	415.8	2,152	10.2		30.1%	Link
VCI	Financial Services	18.5	-6.8%	0.9	21,259	172.7	1,335	13.8		17.5%	Link
DCM	Chemicals	29.0	-1.9%	0.9	15,353	49.7	4,413	6.6	53.3	6.5%	Link
DGC	Chemicals	36.0	-2.3%	0.8	13,672	29.6	5,625	6.4	96.7	4.4%	Link
ACB	Banks	22.3	-0.9%	0.6	129,439	425.7	2,701	8.3	27.1	24.4%	Link
CTG	Banks	28.8	-0.9%	1.0	223,300	193.1	4,906	5.9	53.5	24.5%	Link
HDB	Banks	25.3	-2.1%	1.1	126,633	534.5	3,482	7.3	32.7	21.6%	Link
MBB	Banks	21.7	-1.1%	0.9	174,391	344.9	3,442	6.3	32.4	22.1%	Link
MSB	Banks	15.8	-0.9%	0.9	49,296	124.3	1,884	8.4	14.0	7.5%	Link
STB	Banks	72.5	-1.4%	0.6	136,678	176.7	2,454	29.5		11.2%	Link
TCB	Banks	28.3	-1.2%	1.1	200,186	298.7	3,829	7.4	43.5	21.3%	Link
TPB	Banks	13.9	-2.1%	1.0	38,559	89.2	2,661	5.2	-	22.4%	Link
VCB	Banks	54.0	-0.2%	0.7	451,206	142.1	4,301	12.6	75.8	20.1%	Link
VIB	Banks	14.2	-1.7%	0.7	48,167	60.6	2,231	6.3	23.0	3.5%	Link
VPB	Banks	24.6	-1.6%	1.1	194,778	329.0	3,758	6.5	36.5	23.5%	Link
HPG	Basic Resources	20.4	-2.2%	0.8	171,814	376.6	2,499	8.1	32.2	21.4%	Link
HSG	Basic Resources	10.1	-3.8%	0.8	8,113	18.2	679	14.8	14.3	3.2%	Link
DBC	Food & Beverage	15.7	-2.5%	0.7	6,767	24.6	3,184	4.9	28.8	1.5%	Link
MSN	Food & Beverage	63.9	0.0%	0.9	93,318	296.8	4,640	13.8	100.4	23.9%	Link
VNM	Food & Beverage	57.9	-1.7%	0.5	121,008	216.6	4,914	11.8	78.0	49.2%	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	33.2	-1.04%	1.0	7,331	24.2	2,914	11.4	23.45%		Link
FRT	Retail	107.8	0.00%	0.8	19,276	40.5	5,113	21.1	31.34%		Link
BVH	Insurance	57.5	0.88%	1.0	42,684	14.0	3,977	14.5	27.29%		Link
DIG	Real Estate	9.7	-5.92%	0.9	7,717	192.2	1,003	9.7	2.09%		Link
DXG	Real Estate	10.0	-1.29%	1.0	12,643	258.7	183	54.4	18.72%		Link
HDC	Real Estate	10.9	-6.84%	0.9	2,504	22.5	2,441	4.5	1.37%		Link
HDG	Real Estate	15.5	-4.91%	0.9	6,308	25.8	1,635	9.5	16.47%		Link
IDC	Real Estate	31.5	-5.41%	1.0	13,150	43.3	4,454	7.1	15.50%		Link
NLG	Real Estate	20.0	-6.32%	0.8	9,702	58.0	1,599	12.5	40.60%		Link
SIP	Real Estate	46.6	-0.21%	0.9	11,282	6.5	5,392	8.6	2.27%		Link
SZC	Real Estate	17.2	-6.79%	0.9	3,087	12.2	887	19.3	1.32%	5.1%	Link
TCH	Real Estate	11.0	-5.98%	1.0	10,033	57.0	259	42.5	9.73%		Link
VIC	Real Estate	213.5	0.19%	1.7	1,657,227	622.9	1,506	141.8	3.15%		Link
VRE	Real Estate	21.4	-2.51%	1.4	48,514	66.7	3,025	7.1	11.44%		Link
CMG	Technology	23.6	-4.45%	0.9	5,496	4.8	1,774	13.3	36.50%		Link
PLX	Oil & Gas	32.8	-2.96%	0.9	41,675	44.1	1,400	23.4	14.00%		Link
PVD	Oil & Gas	18.3	-3.68%	1.0	16,978	32.2	1,281	14.3	8.64%		Link
FTS	Financial Services	20.1	-6.94%	1.0	7,661	49.8	1,105	18.2	24.72%	9.5%	Link
MBS	Financial Services	17.4	-6.45%	1.1	17,416	144.1	1,828	9.5	0.38%	14.0%	Link
GAS	Utilities	66.9	-0.45%	1.0	161,426	57.4	4,808	13.9	2.00%		Link
POW	Utilities	13.2	-1.12%	0.9	40,496	95.7	1,122	11.8	4.66%		Link
REE	Utilities	44.4	0.00%	0.3	27,657	25.6	4,224	10.5	48.98%		Link
VJC	Travel & Leisure	126.0	-1.10%	0.6	96,906	134.1	3,287	38.3	6.17%		Link
GEX	Industrial Goods & Services	20.3	-6.88%	1.0	26,562	444.7	1,139	17.8	6.81%		Link
GMD	Industrial Goods & Services	72.3	-1.23%	0.8	30,836	65.8	4,457	16.2	40.52%		Link
HAH	Industrial Goods & Services	44.0	-2.22%	0.5	8,287	154.8	6,744	6.5	9.73%		Link
PVT	Industrial Goods & Services	16.3	-3.26%	0.8	8,426	36.3	2,211	7.4	13.07%		Link
VTP	Industrial Goods & Services	45.5	-4.41%	0.7	9,187	14.2	2,322	19.6	3.74%		Link
PNJ	Personal & Household Goods	32.9	6.99%	0.8	16,836	332.6	7,093	4.6	44.73%		Link
TCM	Personal & Household Goods	16.9	-2.31%	0.8	1,988	17.1	2,181	7.8	48.23%		Link
TNG	Personal & Household Goods	17.1	-2.29%	0.8	2,201	8.7	3,441	5.0	21.73%	22.0%	Link
DPM	Chemicals	22.3	-1.55%	0.7	15,128	41.5	1,868	11.9	3.42%		Link
GVR	Chemicals	26.0	-0.76%	1.5	104,000	41.1	1,572	16.5	0.64%		Link
EIB	Banks	17.2	-1.71%	1.0	32,039	182.5	401	42.9	1.61%		Link
LPB	Banks	54.0	3.05%	0.9	161,313	305.0	3,780	14.3	1.14%	24.7%	Link
NAB	Banks	12.3	-2.00%	0.6	26,446	19.7	2,181	5.6	1.11%		Link
OCB	Banks	10.0	-1.96%	0.8	30,625	20.6	1,395	7.2	19.59%		Link
NKG	Basic Resources	10.4	-0.95%	0.7	5,120	20.2	313	33.2	4.65%		Link
ANV	Food & Beverage	16.2	-4.44%	1.0	4,300	10.3	3,248	5.0	2.77%	23.6%	Link
BAF	Food & Beverage	28.9	-0.17%	0.4	10,525	79.8	549	52.6	2.58%		Link
SAB	Food & Beverage	46.6	0.22%	0.6	59,767	47.3	3,723	12.5	58.64%	22.3%	Link
VHC	Food & Beverage	53.2	-1.30%	0.8	11,143	11.3	6,662	8.0	18.84%		Link
BMP	Construction & Materials	148.5	-1.00%	0.2	12,156	9.2	15,674	9.5	82.56%	42.6%	Link
CTD	Construction & Materials	55.2	0.18%	0.8	6,173	30.4	7,565	7.3	46.77%		Link
CTR	Construction & Materials	68.0	-2.72%	0.8	8,711	6.3	4,901	13.9	4.34%		Link
DPG	Construction & Materials	26.1	-3.16%	0.7	3,089	5.5	3,213	8.1	18.98%		Link
HHV	Construction & Materials	9.8	-1.71%	0.8	5,630	14.0	1,173	8.4	10.34%		Link
PC1	Construction & Materials	21.7	2.61%	0.7	8,904	78.3	2,838	7.6	8.52%		Link
VCG	Construction & Materials	15.3	-1.61%	0.7	10,682	28.1	5,956	2.6	2.06%		Link
VGC	Construction & Materials	37.1	-1.07%	0.9	16,634	15.9	2,896	12.8	0.89%		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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