

MARKET OUTLOOK

The VN-Index rose toward the 1,750-point level in the morning session before selling pressure returned in the afternoon, pushing the index down to close at 1,732.02 points, up 4.56 points from the previous session. Market breadth was negative, with 11 out of 18 sectors declining. Personal & Household Goods posted the steepest loss, followed by Retail and Insurance. In contrast, Oil & Gas led the gains amid escalating developments in the conflict in the Middle East. Regarding foreign investor activity, foreign investors were net sellers on the HSX while recording net buying on the HNX and UPCoM. The index formed a candlestick with a long upper shadow, reflecting increased selling pressure as it rebounded toward the MA10 resistance level (around 1,760 points) and failed to hold above the MA20. The market is currently fluctuating within a narrow range, while low liquidity indicates that the trend remains unclear. Investors are advised to continue trading cautiously.

FUTURES CONTRACTS

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

COVERED WARRANTS

During the trading session on 18/08/2026, most covered warrants fluctuated in line with the fluctuating movement of the underlying stocks.

HIGHLIGHT

- VN-Index **+4.56** points, closing at **1732.02** points. HNX-Index **+3.68** points, closing at **282.32** points.
- Pulling the index up: **VIC (+3.39)**, **GAS (+2.42)**, **BSR (+1.36)**, **VHM (+0.90)**, **PLX (+0.72)**.
- Pulling the index down: **TCB (-1.41)**, **LPB (-0.57)**, **DMX (-0.40)**, **HPG (-0.36)**, **VCB (-0.36)**.
- The matched trade value of VN-Index reached VND **11,556** billion, increased **9.25%** compared to the previous session. The total transaction value reached VND 15,015 billion.
- The trading range is 26.53 points. The market had **129** gainers, 76 remaining unchanged, **167** losers.
- Foreign investors' net selling value: VND **-768.32** billion on HOSE, including **VIC (VND -150.74 billion)**, **VPB (VND -116.73 billion)**, **SSI (VND -65.12 billion)**, **VCB (VND -61.03 billion)**, **VHM (VND -49.53 billion)**. Foreign investors were net buyers on HNX with the value of VND **7.22** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.03%**. Positive stocks: **BSR (+4.62%)**, **PVS (+3.48%)**, **VHM (+1.47%)**.
- BSC50 **-0.18%**. Positive stocks: **PLX (+6.90%)**, **GAS (+5.56%)**, **VTP (+2.19%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.03%	-0.18%	0.26%	-0.08%
1 week	-2.13%	-1.27%	-2.33%	-2.41%
1 month	1.68%	3.92%	0.08%	-0.28%
3 months	-8.41%	-9.92%	-8.08%	-7.48%

Source: FiinPro-X, BSC

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,732.02	282.32	127.46
% 1D	0.26%	1.32%	-0.56%
TV (VND bn)	11,556	711	317
%1D	9.25%	39.21%	1.00%
Foreign (VND bn)	-768.32	7.22	25.19

Source: FiinPro-X, BSC compiled

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FUESSVFL	61.25	VIC	-150.74
VNM	29.80	VPB	-116.73
CTR	16.02	SSI	-65.12
PLX	14.51	VCB	-61.03
MBB	14.23	VHM	-49.53

Source: FiinPro-X, BSC compiled

Overview of global stock markets

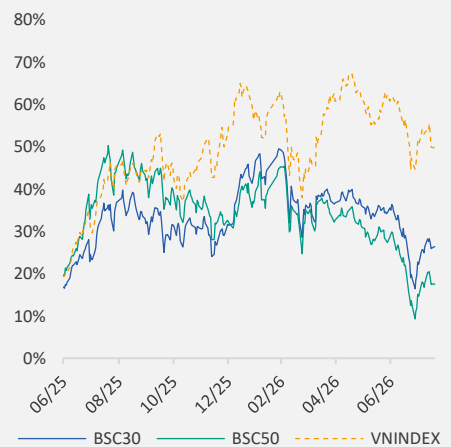
	%D	%W
SPX	-0.52%	-0.10%
FTSE100	-0.55%	-2.10%
Eurostoxx	-0.66%	-0.76%
Shanghai	0.19%	1.43%
Nikkei	-2.54%	0.73%

Source: Vietstock.vn, BSC compiled

	Close	%
Commodities		
Brent	91.32	0.50%
Gold	4,393	-0.52%
Exchange rate		
USD/VND	26,178	-0.10%
EUR/VND	30,296	-0.15%
JPY/VND	164	-0.26%
Interest rates		
10Y-Gov bond rate	4.45%	0.00%
1M-interbank rate	6.90%	0.40%

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)
VIC	200.00	1.01%	3.39	4.41
GAS	83.50	5.56%	2.42	3.66
BSR	27.20	4.62%	1.36	20.62
VHM	69.20	1.47%	0.90	5.90
PLX	37.95	6.90%	0.72	5.37

Top 5 leaders on the HNX

	Close	%Day	Index pt	Volume (mil)
THD	144.40	6.18%	2.03	0.01
NVB	11.40	3.64%	0.72	0.97
PVS	35.70	3.48%	0.38	4.13
PGS	66.80	9.15%	0.18	0.00
NTP	51.90	1.96%	0.12	0.142

Top 5 gainers on the HSX

	Close	%Day	Volume (mil)
CMV	9.10	6.93%	0.01
PLX	37.95	6.90%	5.37
HAS	9.49	6.87%	0.00
CLW	56.20	6.84%	0.00
SVD	4.41	6.78%	0.02

Top 5 gainers on the HNX

	Close	%Day	Volume (mil)
STC	14.50	9.85%	0.02
SMT	10.20	9.68%	0.00
MAC	12.50	9.65%	0.00
BAX	30.70	9.64%	0.00
STP	8.00	9.59%	0.00

Top 5 laggards on the HSX

	Close	%Day	Index pt	Volume (mil)
TCB	30.85	-2.99%	-1.41	14.78
LPB	50.00	-1.77%	-0.57	3.18
DMX	83.00	-1.78%	-0.40	0.53
HPG	21.00	-0.94%	-0.36	16.81
VCB	58.00	-0.34%	-0.36	2.99

Top 5 laggards on the HNX

	Close	%Day	Index pt	Volume (mil)
KSV	118.80	-3.65%	-0.77	0.04
SHS	14.70	-3.29%	-0.26	14.82
MBS	17.10	-1.72%	-0.17	3.22
PTI	20.90	-9.91%	-0.15	0.00
BAB	10.60	-1.85%	-0.13	0.00

Top 5 losers on the HSX

	Close	%Day	Volume (mil)
FDC	23.35	-6.97%	0.00
ABR	11.40	-6.94%	0.00
STG	35.25	-6.87%	0.00
GTA	6.66	-6.85%	0.00
DRH	1.68	-6.67%	0.43

Top 5 losers on the HNX

	Close	%Day	Volume (mil)
ADC	16.20	-10.00%	0.00
PTI	20.90	-9.91%	0.00
PHN	51.80	-9.76%	0.00
ICG	11.20	-9.68%	0.06
PGT	6.60	-9.59%	0.00

Figure 1
Sectors performance

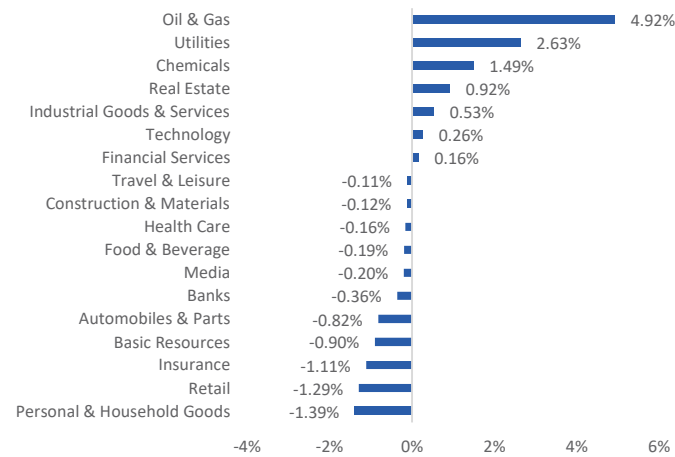
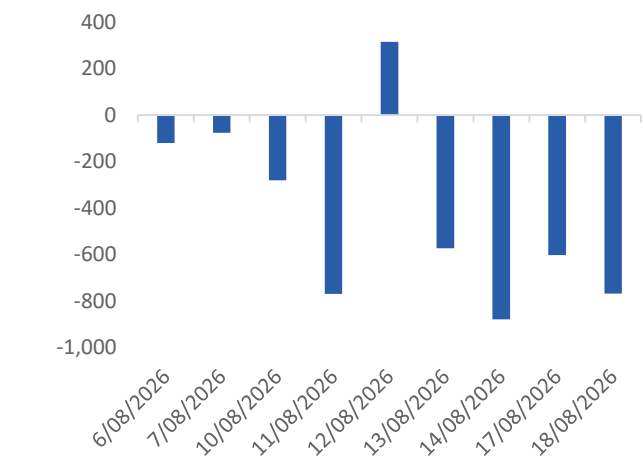


Figure 2
Foreign transactions



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	72.8	-1.0%	1.1	108,469	127.8	6,666	11.0	113.0	49.0%	Link
KBC	Real Estate	27.1	0.0%	1.0	25,474	27.7	1,227	22.1	42.4	7.2%	Link
KDH	Real Estate	17.7	-1.7%	1.0	20,200	71.4	1,565	11.5	39.9	24.4%	Link
PDR	Real Estate	12.1	-0.4%	1.0	12,073	49.7	619	19.5	28.2	7.0%	Link
VHM	Real Estate	69.2	1.5%	1.8	560,251	411.5	9,718	7.0	132.6	6.7%	Link
FPT	Technology	69.0	0.3%	0.7	117,946	326.4	5,865	11.7	124.4	27.3%	Link
BSR	Oil & Gas	27.2	4.6%	0.0	130,190	560.5	3,933	6.6	-	1.2%	Link
PVS	Oil & Gas	35.7	3.5%	1.0	17,644	147.7	4,107	8.4	52.3	15.8%	Link
HCM	Financial Services	25.1	-0.8%	0.9	34,154	431.2	1,306	19.4		34.1%	Link
SSI	Financial Services	19.5	-1.5%	1.1	59,426	331.3	1,752	11.3		30.3%	Link
VCI	Financial Services	21.2	-1.6%	0.9	24,773	185.0	1,335	16.1		17.2%	Link
DCM	Chemicals	30.7	0.5%	0.9	16,173	85.3	4,945	6.2	53.3	5.5%	Link
DGC	Chemicals	41.8	1.5%	0.9	15,647	13.6	5,625	7.3	96.7	3.9%	Link
ACB	Banks	21.7	-0.9%	0.6	126,827	159.9	2,701	8.1	27.1	24.0%	Link
CTG	Banks	31.6	0.2%	1.0	244,659	165.9	5,172	6.1	53.5	24.7%	Link
HDB	Banks	27.0	0.4%	1.1	134,392	251.4	3,829	7.0	32.7	21.6%	Link
MBB	Banks	20.0	0.3%	0.9	200,368	142.0	3,242	6.1	32.4	22.2%	Link
MSB	Banks	15.8	-2.2%	0.8	50,232	39.8	1,888	8.5	14.0	7.4%	Link
STB	Banks	75.2	1.4%	0.5	139,883	584.9	1,634	45.4		11.0%	Link
TCB	Banks	30.9	-3.0%	1.1	225,342	460.1	3,829	8.3	43.5	20.5%	Link
TPB	Banks	14.4	-0.7%	1.0	40,085	58.0	2,778	5.2	-	22.0%	Link
VCB	Banks	58.0	-0.3%	0.7	486,300	174.4	4,984	11.7	75.8	20.1%	Link
VIB	Banks	14.4	0.7%	0.8	48,677	135.3	2,180	6.6	23.0	3.3%	Link
VPB	Banks	24.9	0.6%	1.1	196,365	465.1	3,758	6.6	36.5	22.9%	Link
HPG	Basic Resources	21.0	-0.9%	0.8	178,991	356.4	2,750	7.7	32.2	21.7%	Link
HSG	Basic Resources	10.6	-0.5%	0.8	8,597	11.0	813	13.1	14.3	3.2%	Link
DBC	Food & Beverage	16.1	-0.3%	0.7	6,940	21.8	2,679	6.0	28.8	1.3%	Link
MSN	Food & Beverage	66.8	-0.2%	0.9	97,699	203.0	4,635	14.4	100.4	24.1%	Link
VNM	Food & Beverage	62.1	-0.2%	0.5	129,995	147.8	5,246	11.9	78.0	49.6%	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	41.5	0.48%	1.1	9,134	51.3	3,785	10.9	23.90%	23.8%	Link
FRT	Retail	145.1	-1.29%	0.9	26,286	126.7	6,359	23.1	33.37%	27.5%	Link
BVH	Insurance	67.5	-1.46%	1.0	50,849	20.3	4,472	15.3	27.38%	13.2%	Link
DIG	Real Estate	10.6	-3.20%	0.9	8,721	48.2	1,051	10.4	2.58%	8.0%	Link
DXG	Real Estate	11.1	-3.91%	0.9	14,583	132.6	157	73.4	18.13%	1.4%	Link
HDC	Real Estate	11.7	-2.51%	0.9	2,745	8.7	2,389	5.0	1.19%	23.0%	Link
HDG	Real Estate	16.1	-1.23%	0.9	6,613	10.8	1,803	9.0	15.98%	10.9%	Link
IDC	Real Estate	32.9	-1.20%	1.0	13,901	19.7	5,201	6.4	15.18%	32.7%	Link
NLG	Real Estate	23.5	-1.05%	0.8	11,521	32.7	1,407	16.9	38.18%	5.2%	Link
SIP	Real Estate	49.4	-1.00%	0.9	12,081	8.3	5,924	8.4	2.38%	27.9%	Link
SZC	Real Estate	19.2	-2.54%	1.0	3,537	8.1	887	22.2	1.19%	5.1%	Link
TCH	Real Estate	11.8	-3.28%	1.1	11,128	35.6	345	35.3	9.19%	2.6%	Link
VIC	Real Estate	200.0	1.01%	1.6	1,536,913	882.7	2,920	67.8	3.19%	14.8%	Link
VRE	Real Estate	24.4	0.00%	1.5	55,445	72.9	3,191	7.7	11.11%	15.0%	Link
CMG	Technology	24.1	0.00%	0.9	5,601	2.6	1,692	14.2	36.41%	12.3%	Link
PLX	Oil & Gas	38.0	6.90%	1.0	45,106	201.5	2,535	14.0	14.16%	12.5%	Link
PVD	Oil & Gas	18.5	1.93%	0.9	16,839	397.9	1,198	15.2	8.65%	6.5%	Link
FTS	Financial Services	21.9	1.16%	1.1	8,233	13.1	1,105	19.6	24.64%	9.5%	Link
MBS	Financial Services	17.1	-1.72%	1.1	17,416	55.7	1,828	9.5	0.32%	14.0%	Link
GAS	Utilities	83.5	5.56%	1.0	190,864	304.1	5,265	15.0	2.07%	18.9%	Link
POW	Utilities	13.4	0.00%	0.9	40,956	67.0	2,098	6.4	4.44%	16.5%	Link
REE	Utilities	45.4	-0.44%	0.4	28,373	9.8	4,239	10.8	49.00%	12.6%	Link
VJC	Travel & Leisure	123.5	0.00%	0.6	94,983	1038.7	2,830	43.6	6.11%	8.6%	Link
GEX	Industrial Goods & Services	24.9	1.43%	1.1	32,123	210.2	1,048	23.4	6.69%	7.5%	Link
GMD	Industrial Goods & Services	79.5	0.89%	0.8	34,112	329.8	6,056	13.0	40.03%	19.4%	Link
HAH	Industrial Goods & Services	46.7	1.97%	0.5	8,786	65.2	6,544	7.0	8.89%	26.7%	Link
PVT	Industrial Goods & Services	20.4	0.49%	0.9	10,493	123.5	2,711	7.5	14.11%	15.9%	Link
VTP	Industrial Goods & Services	56.0	2.19%	0.7	11,063	103.2	2,224	24.6	3.68%	18.5%	Link
PNJ	Personal & Household Goods	35.1	-3.18%	0.8	18,524	168.1	5,673	6.4	44.43%	21.6%	Link
TCM	Personal & Household Goods	16.3	-1.21%	0.7	1,941	8.3	1,873	8.8	48.03%	9.1%	Link
TNG	Personal & Household Goods	16.8	-1.75%	0.8	2,201	6.7	3,441	5.0	21.45%	22.0%	Link
DPM	Chemicals	21.7	0.93%	0.8	14,618	42.1	2,608	8.2	3.37%	15.6%	Link
GVR	Chemicals	32.0	2.07%	1.5	125,400	110.1	1,783	17.6	0.62%	12.2%	Link
EIB	Banks	17.0	-0.58%	1.0	31,853	291.8	264	64.8	1.20%	1.9%	Link
LPB	Banks	50.0	-1.77%	0.8	152,053	160.9	3,780	13.5	1.49%	24.7%	Link
NAB	Banks	11.6	-0.43%	0.5	25,150	14.8	2,265	5.1	1.01%	19.5%	Link
OCB	Banks	11.0	0.00%	0.7	33,534	23.3	1,454	7.5	19.53%	13.0%	Link
NKG	Basic Resources	10.6	-1.85%	0.7	5,317	12.3	338	31.9	4.81%	2.2%	Link
ANV	Food & Beverage	16.9	-0.88%	1.0	4,526	6.5	3,248	5.2	2.59%	23.6%	Link
BAF	Food & Beverage	31.8	0.00%	0.5	11,583	92.1	259	122.5	2.95%	2.2%	Link
SAB	Food & Beverage	46.3	1.20%	0.6	58,677	42.8	3,723	12.3	58.82%	22.3%	Link
VHC	Food & Beverage	53.4	-1.11%	0.8	11,310	16.2	6,457	8.4	18.49%	15.0%	Link
BMP	Construction & Materials	146.1	0.34%	0.2	11,919	7.8	15,674	9.3	82.42%	42.6%	Link
CTD	Construction & Materials	61.5	0.00%	0.8	6,877	10.3	7,046	8.7	46.74%	8.3%	Link
CTR	Construction & Materials	77.1	0.39%	0.8	9,839	52.7	5,109	15.0	5.36%	30.2%	Link
DPG	Construction & Materials	30.3	0.33%	0.8	3,575	7.9	3,441	8.8	18.60%	14.5%	Link
HHV	Construction & Materials	10.0	-0.50%	0.8	5,774	15.8	1,164	8.6	10.36%	5.8%	Link
PC1	Construction & Materials	20.4	0.00%	0.7	8,390	18.3	2,861	7.1	8.43%	18.2%	Link
VCG	Construction & Materials	15.8	0.00%	0.7	11,031	16.0	5,821	2.7	1.98%	35.3%	Link
VGC	Construction & Materials	40.3	0.00%	0.9	18,069	8.6	3,173	12.7	0.95%	16.2%	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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