

Selling pressure in oil & gas stocks dragged the VN-Index lower today.

Thursday, October 29, 2026 · BSC Research

VN-INDEX

1,755.61

▼ -11.04 (-0.62%)



VALUE BN	VS MA20	FOREIGN
12,477	+0.7%	-459.3

VN30

1,877.18

▼ -13.04 (-0.69%)



VALUE BN	VS MA20	FOREIGN
6,888	-2.5%	-323.6

HNX-INDEX

256.61

▼ -3.25 (-1.25%)



VALUE BN	VS MA20	FOREIGN
597	-15.1%	+27.0

UPCOM-INDEX

124.10

▼ -1.64 (-1.30%)



VALUE BN	VS MA20	FOREIGN
507	+12.0%	+2.5

Market commentary

EQUITY MARKET

Selling pressure regained dominance today, pushing the VN-Index down 11.04 points (-0.62%) to close at 1,755.61. Market breadth skewed negative, with 13 out of 18 sectors declining. Oil & gas led the losses, followed by information technology and industrial goods & services, while basic resources outperformed. Foreign investors net sold on HSX but net bought on HNX and UPCoM. After several choppy sessions, the VN-Index failed to break above SMA50 resistance (around 1,772 points). Divergent performance across key market sectors, coupled with heavy selling in oil & gas, weighed on the index. However, RSI remained above 50 and MACD stayed positive, suggesting a correction within the consolidation range. Volatility may persist, with further selling pressure potentially driving the index toward SMA10/SMA20 support at 1,735–1,740 points.

FUTURES

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

COVERED WARRANTS

On October 29, 2026, most covered warrants declined.

Foreign trading

ALL 3 EXCHANGES

TOP BUYS	VND BN	TOP SELLS	VND BN
VPB	83.04	TCB	-118.27
HPG	63.34	FPT	-114.84
SHB	43.45	SSI	-78.88
PPE	40.32	VHM	-64.83
VCB	21.47	VPL	-60.58

HOSE YTD: **-121,272** bn 5 consecutive net selling sessions

Source: FiinPro-X, BSC compiled

Global markets

	CLOSE	%D	%W
SPX	7,723	+0.60%	+0.13%
FTSE100	10,686	-0.75%	-0.43%
Eurostoxx	6,165	+0.79%	+0.70%
Shanghai	3,681	+0.91%	-0.85%
Nikkei	63,954	+1.08%	-1.03%

Source: Yahoo Finance, BSC compiled

Cross-asset

	VALUE	%D	%W
Brent oil	114.54	-0.68%	+1.21%
Gold	4,026	-1.01%	+0.04%
USD/VND	25,829	-0.09%	-0.07%
EUR/VND	28,756	-0.25%	-0.77%
JPY/VND	164	-0.14%	-0.81%
VN 10Y gov't bond yield	4.47%	0 bps	+0.1 bps
VN 1M interbank rate	5.55%	+85.0 bps	+48.3 bps

Source: Bloomberg, BSC compiled. Rates: change in basis points.

Highlights

- VN-Index **-11.04** pts, closing at 1,755.61. HNX-Index **-3.25** pts, closing at 256.61. UPCoM-Index **-1.64** pts, closing at 124.10.
- Top positive contributors: HPG (+0.79), VPL (+0.45), GVR (+0.37), BID (+0.32), DMX (+0.24).
- Top negative contributors: VHM (-2.38), BSR (-1.14), GAS (-0.85), MCH (-0.68), MSN (-0.63).
- VN-Index matched value reached VND 12,477 bn, up 2.28% from the previous session and 0.7% above the 20-session average. Total trading value was VND 14,530 bn.
- Intraday range: 19.0 pts. HOSE had 98 advancers (3 at the ceiling), 92 unchanged and 212 decliners (6 at the floor).
- Foreign investors were net sellers of VND **-459.35** bn on HOSE, led by TCB (-118.27 bn), FPT (-114.84 bn), SSI (-78.88 bn), VHM (-64.83 bn), VPL (-60.58 bn). This marks 5 consecutive sessions of net selling; year-to-date net selling on HOSE totals VND **-121,272** bn.
- Foreign investors were net buyers of VND **+26.97** bn on HNX and net buyers of VND **+2.45** bn on UPCoM.



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Market statistics

Top 5 positive contributors · VN-Index

TICKER	PRICE	%CHG	INDEX PTS	VOL (MN)
HPG	21.20	+2.17%	+0.79	38.82
VPL	90.10	+1.35%	+0.45	1.05
GVR	31.95	+1.43%	+0.37	3.87
BID	33.85	+0.59%	+0.32	6.25
DMX	75.60	+1.20%	+0.24	0.11

Top 5 positive contributors · HNX-Index

TICKER	PRICE	%CHG	INDEX PTS	VOL (MN)
PGS	84.50	+8.47%	+0.26	0.00
NTP	53.80	+2.09%	+0.08	0.67
HUT	12.50	+0.81%	+0.08	0.68
CLM	61.30	+8.88%	+0.03	0.00
LHC	50.00	+2.46%	+0.03	0.01

Top 5 positive contributors · VN30

TICKER	PRICE	%CHG	INDEX PTS	VOL (MN)
HPG	21.20	+2.17%	+3.72	38.82
VPL	90.10	+1.35%	+0.16	1.05
SHB	10.70	+0.47%	+0.13	24.49
GVR	31.95	+1.43%	+0.12	3.87
VRE	24.15	+0.21%	+0.07	1.90

Top 5 gainers · HOSE

TICKER	PRICE	%CHG	VOL (MN)
SGN	56.80	+6.97%	0.04
BCE	6.45	+6.97%	0.20
L10	40.75	+6.96%	0.01
COM	35.35	+6.80%	0.00
NO1	3.19	+6.69%	0.23

Top 5 gainers · HNX

TICKER	PRICE	%CHG	VOL (MN)
NAP	11.00	+10.00%	0.01
CAR	73.10	+9.92%	0.00
VNT	36.00	+9.76%	0.00
VCM	6.80	+9.68%	0.00
EID	19.40	+9.60%	0.01

Top 5 negative contributors · VN-Index

TICKER	PRICE	%CHG	INDEX PTS	VOL (MN)
VHM	62.10	-2.20%	-2.38	6.45
BSR	27.65	-3.83%	-1.14	13.36
GAS	76.00	-2.19%	-0.85	2.59
MCH	137.30	-1.79%	-0.68	0.30
MSN	72.10	-2.83%	-0.63	5.39

Top 5 negative contributors · HNX-Index

TICKER	PRICE	%CHG	INDEX PTS	VOL (MN)
KSF	70.90	-3.67%	-1.16	0.11
THD	93.60	-2.50%	-1.10	0.00
PVS	30.50	-4.69%	-0.55	4.72
NVB	14.50	-1.36%	-0.45	0.98
IDC	35.60	-1.11%	-0.14	0.64

Top 5 negative contributors · VN30

TICKER	PRICE	%CHG	INDEX PTS	VOL (MN)
FPT	52.70	-2.41%	-3.40	17.72
MSN	72.10	-2.83%	-3.00	5.39
VHM	62.10	-2.20%	-1.71	6.45
LPB	37.30	-2.10%	-1.51	1.64
STB	66.90	-1.62%	-1.38	2.60

Top 5 losers · HOSE

TICKER	PRICE	%CHG	VOL (MN)
PVP	18.75	-6.95%	2.95
HAS	8.72	-6.94%	0.00
HII	9.96	-6.92%	0.20
KOS	3.80	-6.86%	1.39
FUEMITEC	10.25	-6.82%	0.00

Top 5 losers · HNX

TICKER	PRICE	%CHG	VOL (MN)
SMT	8.10	-10.00%	0.00
PPE	21.50	-9.66%	1.60
PPT	6.60	-9.59%	1.81
V21	4.80	-9.43%	0.00
VLA	5.30	-8.62%	0.00

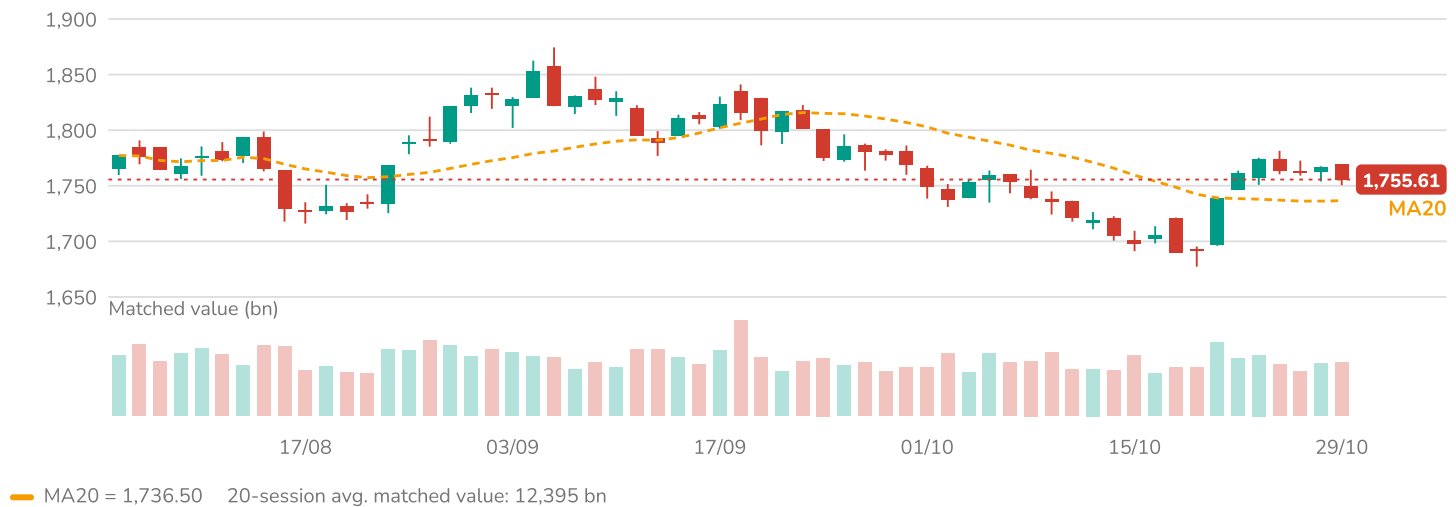
Source: FiinPro-X, Bloomberg, BSC compilation; index contribution from Bloomberg (MOV). Prices in VND thousand.

Top gainers/losers include only stocks traded in the session.

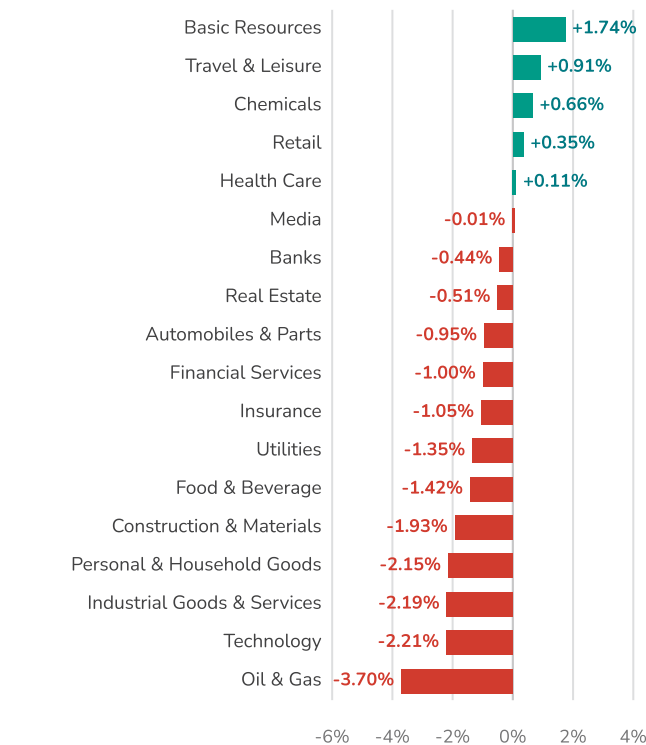
Index pts: points each stock added to (+) or took from (-) the index's change in the session.

Charts & money flow

VN-Index · last 60 sessions



Sector performance (ICB L2)



Money flow by sector & size

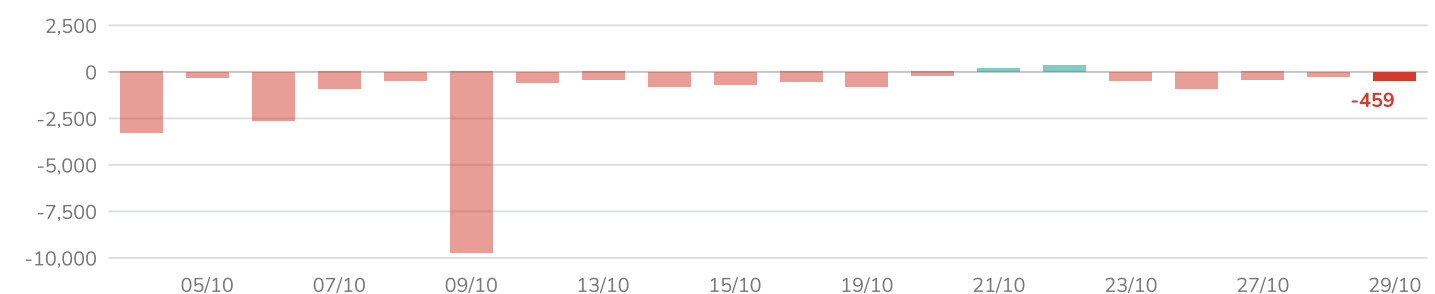
Table 1 · By sector Top 10 by foreign net value · VND bn

SECTOR	%1D	VALUE	FOREIGN
Basic Resources	+1.74%	1,080	72.4
Chemicals	+0.66%	372	15.3
Banks	-0.44%	4,251	-21.9
Oil & Gas	-3.70%	725	-23.4
Travel & Leisure	+0.91%	308	-57.5
Real Estate	-0.51%	1,651	-65.9
Financial Services	-1.00%	1,361	-89.8
Food & Beverage	-1.42%	869	-101.1
Industrial Goods & Services	-2.19%	1,320	-106.2
Technology	-2.21%	974	-116.9

Table 2 · By size group VN30 · VNMIID · VNSML · VND bn

SIZE GROUP	%1D	VALUE	FOREIGN
VN30	-0.69%	8,245	-323.6
VNMIID	-0.91%	5,167	-112.2
VNSML	-0.89%	872	-21.2

Foreign net trading on HOSE · last 20 sessions (VND bn)



Source: FiinPro-X, BSC compiled

BSC30 portfolio

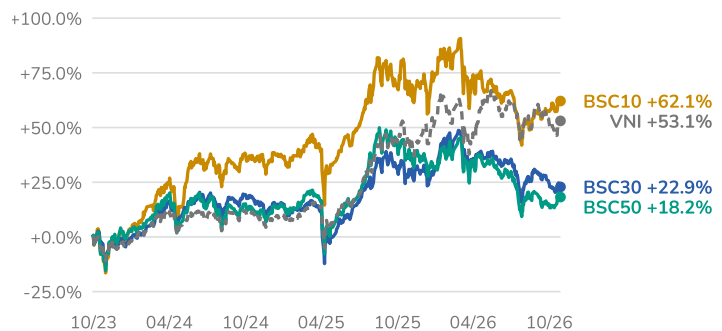
BSC30 & BSC50 today

- BSC30 **-0.94%**. Top performers: [HPG](#) (+2.17%), [DGC](#) (+1.22%), [BID](#) (+0.59%).
- BSC50 **-1.40%**. Top performers: [GVR](#) (+1.43%), [HDG](#) (+1.32%), [CTR](#) (+1.04%).

RETURN	BSC30	BSC50	VN-INDEX	VN30
1 day	-0.94%	-1.40%	-0.62%	-0.69%
1 week	-1.39%	-2.30%	-0.29%	-0.83%
1 month	+0.04%	+0.09%	+0.36%	-0.71%
3 months	+1.13%	+0.87%	+0.63%	-0.48%

Source: BSC, FiinPro-X.

Cumulative return



Source: BSC, FiinPro-X.

TICKER	SECTOR	PRICE	%CHG	BETA	MKT CAP	VALUE	EPS	P/E	TARGET	FOREIGN OWN.	REPORT
MWG	Retail	75.8	-0.26%	1.1	111,858	201.5	7,556	10.0	113.0	49.0%	Link
KBC	Real Estate	26.5	-1.85%	1.0	24,957	29.2	1,859	14.2	42.4	6.2%	Link
KDH	Real Estate	14.0	-1.75%	1.0	17,434	59.3	1,424	9.8	39.9	23.1%	Link
PDR	Real Estate	11.4	-1.30%	1.0	11,375	56.2	619	18.4	28.2	7.0%	Link
VHM	Real Estate	62.1	-2.20%	1.8	510,141	407.6	9,730	6.4	132.6	6.3%	Link
FPT	Technology	52.7	-2.41%	0.7	99,378	957.6	5,479	9.6	124.4	27.0%	Link
BSR	Oil & Gas	27.6	-3.83%	–	138,452	371.3	3,974	7.0	–	1.6%	Link
PVS	Oil & Gas	30.5	-4.69%	0.9	18,718	145.9	3,417	8.9	52.3	15.4%	Link
HCM	Financial Services	23.1	-1.71%	0.9	31,623	58.6	1,070	21.6	–	34.3%	Link
SSI	Financial Services	19.6	-0.76%	1.1	58,826	277.1	1,752	11.2	–	29.9%	Link
VCI	Financial Services	19.0	0.00%	0.9	21,892	113.8	1,249	15.2	–	14.6%	Link
DCM	Chemicals	34.2	-1.72%	0.9	18,105	82.4	4,939	6.9	53.3	7.0%	Link
DGC	Chemicals	33.3	+1.22%	0.9	12,647	12.1	4,883	6.8	96.7	2.6%	Link
ACB	Banks	21.3	-0.23%	0.6	123,634	164.1	2,773	7.7	27.1	22.4%	Link
BID	Banks	33.9	+0.59%	1.0	263,293	214.6	4,250	8.0	–	17.4%	Link
CTG	Banks	30.7	0.00%	1.0	238,445	254.3	5,172	5.9	53.5	24.4%	Link
HDB	Banks	22.7	-0.66%	1.0	147,706	725.5	2,942	7.7	32.7	19.2%	Link
MBB	Banks	19.7	0.00%	0.9	198,354	184.0	3,219	6.1	32.4	22.3%	Link
MSB	Banks	16.1	+0.31%	0.7	60,091	405.8	1,573	10.2	14.0	6.3%	Link
STB	Banks	66.9	-1.62%	0.5	126,121	170.9	809	82.7	–	10.3%	Link
TCB	Banks	22.4	0.00%	1.0	237,566	533.0	2,694	8.3	43.5	20.8%	Link
TPB	Banks	12.9	-0.77%	0.9	41,153	284.7	2,376	5.4	–	21.7%	Link
VCB	Banks	57.2	-0.52%	0.7	477,945	246.2	4,984	11.5	–	19.9%	Link
VIB	Banks	14.0	-1.06%	0.7	52,295	166.7	2,071	6.8	23.0	3.9%	Link
VPB	Banks	23.2	-1.28%	1.0	232,000	415.5	3,118	7.4	36.5	22.2%	Link
DBC	Food & Beverage	15.8	-0.63%	0.7	6,811	40.0	2,348	6.7	28.8	1.2%	Link
MSN	Food & Beverage	72.1	-2.83%	0.9	105,293	392.4	6,243	11.6	100.4	24.8%	Link
VNM	Food & Beverage	57.7	-0.86%	0.5	120,590	147.4	5,246	11.0	78.0	49.7%	Link
HPG	Basic Resources	21.2	+2.17%	0.8	178,991	827.2	2,750	7.7	32.2	21.7%	Link
HSG	Basic Resources	11.2	+0.45%	0.8	9,001	59.7	813	13.7	14.3	3.2%	Link

Price, target: VND thousand. Market cap, value: VND bn. Foreign own.: foreign ownership ratio. Source: FiinPro-X, BSC. 30 stocks.

The BSC30 portfolio comprises 30 of the largest and most liquid companies listed on HOSE, HNX and UPCoM, selected by BSC experts for stable business operations, strong financials, effective governance and competitive strength. BSC publishes the portfolio quarterly.

BSC50 portfolio

TICKER	SECTOR	PRICE	%CHG	BETA	MKT CAP	VALUE	EPS	P/E	FOREIGN OWN.	ROE	REPORT
DGW	Retail	42.5	+0.35%	1.0	9,493	71.5	4,269	10.0	28.4%	26.7%	Link
FRT	Retail	147.7	+0.48%	0.8	26,411	94.3	6,359	23.2	33.8%	–	Link
BVH	Insurance	69.0	-1.15%	0.9	51,220	87.1	4,472	15.4	27.2%	–	Link
DIG	Real Estate	9.8	+0.20%	0.9	8,265	29.7	987	9.9	2.5%	–	Link
DXG	Real Estate	9.9	-1.10%	0.9	12,529	67.8	157	63.1	14.7%	–	Link
HDC	Real Estate	11.2	-2.61%	0.9	2,573	21.7	690	16.2	1.9%	6.6%	Link
IDC	Real Estate	35.6	-1.11%	0.9	14,861	22.5	5,201	6.8	14.9%	–	Link
NLG	Real Estate	23.0	0.00%	0.9	11,157	22.3	1,407	16.3	35.3%	–	Link
SIP	Real Estate	49.0	-0.91%	0.9	11,864	7.0	5,867	8.3	2.2%	–	Link
SZC	Real Estate	19.4	-3.48%	1.0	3,492	19.7	891	21.8	1.3%	5.1%	Link
TCH	Real Estate	12.2	+0.83%	1.0	12,240	59.0	312	39.1	9.5%	–	Link
VIC	Real Estate	241.0	0.00%	1.6	1,870,687	423.1	2,751	87.6	3.1%	–	Link
VRE	Real Estate	24.1	+0.21%	1.6	54,876	45.6	3,255	7.4	11.1%	14.9%	Link
CMG	Technology	18.9	-0.79%	0.9	4,402	6.3	1,692	11.2	35.8%	–	Link
VJC	Travel & Leisure	131.6	+0.08%	0.6	101,213	197.1	2,830	46.5	5.2%	–	Link
PLX	Oil & Gas	34.0	-3.82%	1.0	43,992	256.3	2,522	13.5	14.3%	–	Link
PVD	Oil & Gas	18.4	-2.39%	0.9	17,024	98.6	1,199	15.3	8.2%	–	Link
FTS	Financial Services	18.9	-0.79%	1.1	7,180	11.6	1,054	17.9	24.6%	9.0%	Link
MBS	Financial Services	15.3	0.00%	1.1	15,314	35.1	1,562	9.8	0.3%	12.3%	Link
GEX	Industrial Goods & Services	23.0	-0.43%	1.1	30,095	175.6	762	30.2	6.0%	5.2%	Link
GMD	Industrial Goods & Services	52.1	-3.52%	0.8	33,830	134.0	3,991	13.1	38.5%	–	Link
HAH	Industrial Goods & Services	49.0	-3.06%	0.5	9,410	39.1	6,594	7.4	3.5%	25.9%	Link
PVT	Industrial Goods & Services	21.3	-6.78%	0.8	11,010	457.0	2,977	7.2	16.6%	16.6%	Link
VTP	Industrial Goods & Services	46.3	-0.11%	0.7	9,347	21.5	2,199	21.1	3.9%	–	Link
PNJ	Personal & Household Goods	16.1	-6.41%	1.0	8,213	194.6	4,780	3.4	26.0%	–	Link
TCM	Personal & Household Goods	15.8	-3.37%	0.7	1,853	15.5	1,872	8.4	48.2%	–	Link
TNG	Personal & Household Goods	19.0	-3.55%	0.7	2,446	19.1	3,692	5.2	21.7%	23.6%	Link
DPM	Chemicals	20.9	-1.88%	0.8	14,210	60.6	2,608	8.0	3.3%	–	Link
GVR	Chemicals	31.9	+1.43%	1.5	127,800	125.7	1,751	18.2	0.5%	–	Link
EIB	Banks	16.8	+0.90%	1.0	31,294	62.7	264	63.6	1.0%	–	Link
LPB	Banks	37.3	-2.10%	0.8	111,426	61.8	4,048	9.2	1.5%	26.0%	Link
NAB	Banks	12.7	0.00%	0.5	27,309	28.0	2,243	5.6	0.9%	–	Link
OCB	Banks	10.8	+0.47%	0.7	32,922	30.9	1,482	7.2	19.0%	12.8%	Link
ANV	Food & Beverage	16.9	-3.43%	1.0	4,500	25.4	2,961	5.7	1.6%	20.8%	Link
BAF	Food & Beverage	30.4	+0.83%	0.5	12,323	54.0	256	118.6	3.2%	–	Link
SAB	Food & Beverage	42.3	-1.40%	0.5	54,252	21.4	3,723	11.4	58.8%	–	Link
VHC	Food & Beverage	51.5	-0.19%	0.7	10,787	7.7	6,485	7.9	17.5%	–	Link
NKG	Basic Resources	12.1	-0.41%	0.7	5,957	116.7	494	24.5	4.7%	3.2%	Link
BMP	Construction & Materials	136.5	-1.16%	0.2	11,174	7.8	15,292	8.9	82.0%	41.4%	Link
CTD	Construction & Materials	64.7	-4.85%	0.8	7,235	58.4	7,050	9.2	46.6%	–	Link
CTR	Construction & Materials	68.0	+1.04%	0.8	8,711	13.2	5,223	13.0	5.5%	30.5%	Link
DPG	Construction & Materials	30.2	-2.42%	0.8	3,581	20.7	3,530	8.6	18.4%	–	Link
HHV	Construction & Materials	9.5	-1.97%	0.8	5,435	20.3	1,164	8.1	10.0%	–	Link
PC1	Construction & Materials	18.9	-2.33%	0.6	7,753	12.6	2,809	6.7	8.4%	–	Link
VCG	Construction & Materials	15.3	-2.86%	0.6	10,682	22.1	5,869	2.6	2.0%	–	Link
VGC	Construction & Materials	42.3	-2.53%	0.9	18,965	31.2	4,003	10.6	0.9%	20.6%	Link
GAS	Utilities	76.0	-2.19%	1.0	183,384	194.9	5,269	14.4	2.1%	–	Link
HDG	Utilities	15.3	+1.32%	0.9	6,226	10.7	2,298	6.7	15.7%	–	Link
POW	Utilities	12.4	-1.20%	0.8	38,041	67.3	2,049	6.0	4.1%	–	Link
REE	Utilities	45.5	-1.73%	0.4	28,365	7.7	4,237	10.7	49.0%	–	Link

Price, target: VND thousand. Market cap, value: VND bn. Foreign own.: foreign ownership ratio. Source: FiinPro-X, BSC. 50 stocks.

Recent BSC research reports

NO.	REPORT	MACRO	SECTOR	LINK
1	BSC Navigator 10.2026: Vietnam – Year-end policy direction	x		View
2	BSC Navigator 09.2026: Vietnam – Year-end policy direction	x		View
3	BSC Navigator 08.2026: Vietnam among three Section 301 investigations in 2026	x		View
4	BSC Insight Market Waves – SOE equitization and divestment (Part 4)	x		View
5	BSC Insight Outlook H2/2026: Adapt quickly & seize opportunities	x		–
6	BSC Navigator 07.2026: Update on MSCI's June 2026 market classification review	x		View
7	BSC Navigator 06.2026: Assessing Vietnam's trade deficit in 5M2026	x		View
8	BSC Navigator 05.2026: Update on changes to FTSE's FAQ v1.2	x		View
9	BSC Navigator 04.2026: FTSE Russell confirms Vietnam's market upgrade roadmap	x		View
10	BSC Insight FTSE Russell officially announces Vietnam's market upgrade (Part 4)	x		View
11	BSC Navigator 2026: Updated macro and market forecasts amid escalating Middle East tensions	x		View
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