

STOCK MARKET

The VN-Index traded within the range of 1,285 to 1,290 for most of the day before falling to close at 1,280.02, down more than 5 points compared to the previous session. The market breadth was negative, with 16 out of 18 sectors declining, led by the Consumer Goods & Household sector. Conversely, the Real Estate and Financial Services sectors had a positive trading session. Regarding foreign trading activity, foreign investors were net sellers on both the HSX and HNX exchanges today. The accumulation trend within the 1,280 to 1,285 range still shows no signs of ending.

FUTURES CONTRACTS

Futures contracts increased inversely to the movement of VN30.

COVERED WARRANTS

During the trading session on 26/08/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **-5.30** points, closing at **1280.02** points. HNX-Index **-1.10** points, closing at **238.97** points.
- Pulling the index up: **VHM (+0.82)**, **VIC (+0.57)**, **VPB (+0.49)**, **VRE (+0.20)**, **TCB (+0.17)**.
- Pulling the index down: **VNM (-0.75)**, **MSN (-0.58)**, **FPT (-0.56)**, **VCB (-0.54)**, **PNJ (-0.49)**.
- The matched trade value of VN-Index reached **VND 16,549 billion**, increased **16.24%** compared to the previous session. The total transaction value reached VND 18,265 billion.
- The trading range is 11.73 points. The market had **148** gainers, 68 remaining unchanged, **259** losers.
- Foreign investors' net selling value: **VND -390.10 billion** on HOSE, including **HPG (VND -148.89 billion)**, **HSG (VND -71.96 billion)**, **VPB (VND -66.00 billion)**, **PVD (VND -57.52 billion)**, **CTG (VND -43.28 billion)**. Foreign investors were net sellers on HNX with the value of **VND -46.43 billion**.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.06%**. Positive stocks: **VPB (+2.40%)**, **VHM (+1.89%)**, **VHC (+1.22%)**.
- BSC50 **+0.14%**. Positive stocks: **VRE (+2.05%)**, **VND (+1.92%)**, **VGC (+1.91%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.06%	0.14%	-0.41%	-0.19%
1 week	1.73%	1.66%	1.88%	1.70%
1 months	2.54%	3.12%	2.55%	2.17%
3 months	-3.79%	-7.73%	-4.15%	-2.27%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,280.02	238.97	94.16
% 1D	-0.41%	-0.46%	-0.26%
TV (bil VND)	16,549	1,055	598
%1D	16.24%	-12.61%	-5.34%
Foreign (bil VND)	-390.10	-46.43	17.24

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
HCM	66.34	HPG	-148.89
VCI	56.99	HSG	-71.96
FPT	55.18	VPB	-66.00
FUEVFNVD	34.74	PVD	-57.52
VHC	29.30	CTG	-43.28

Overview of global stock markets

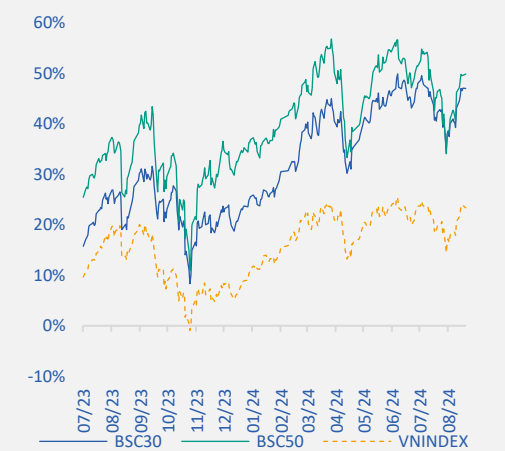
		%D	%W
SPX	5,635	1.15%	1.45%
FTSE100	8,328	0.48%	0.20%
Eurostoxx	4,902	-0.08%	0.55%
Shanghai	2,856	0.04%	-1.32%
Nikkei	38,058	-0.94%	1.86%

Source: Bloomberg

	Close	%
Commodities		
Brent	79	-0.23%
Gold	2,561	2.10%
Exchange rate		
USD/VND	25,070	-0.32%
EUR/VND	28,661	0.33%
JPY/VND	177	0.57%
Interest rates		
10Y-Gov bond rate	0.00%	
1M-interbank rate	4.52%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
VHM	40.50	1.89%	0.82	4.35
VIC	42.15	1.44%	0.57	3.82
VPB	19.00	1.33%	0.49	7.93
VRE	19.85	1.79%	0.20	2.27
TCB	22.50	0.45%	0.17	7.05

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
VIF	18.10	7.74%	0.36	0.35
KSV	50.80	1.60%	0.12	0.20
DNP	22.80	3.17%	0.07	0.14
HGM	74.00	9.14%	0.06	0.01
THD	35.70	0.56%	0.06	0.38

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
MSH	47.50	6.98%	0.06	0.50
HHV	10.75	6.97%	0.08	9.46
BMC	21.60	6.93%	0.00	0.44
VRC	8.81	6.92%	0.01	0.15
STG	43.95	6.80%	0.07	0.00

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
BPC	14.40	9.92%	0.01	0.03
DTC	8.90	9.88%	0.01	0.00
HTC	5.60	9.80%	0.02	0.06
PIA	23.90	9.63%	0.14	0.00
PCT	34.00	8.97%	0.05	0.00

Figure 1
HSX-Index Intraday

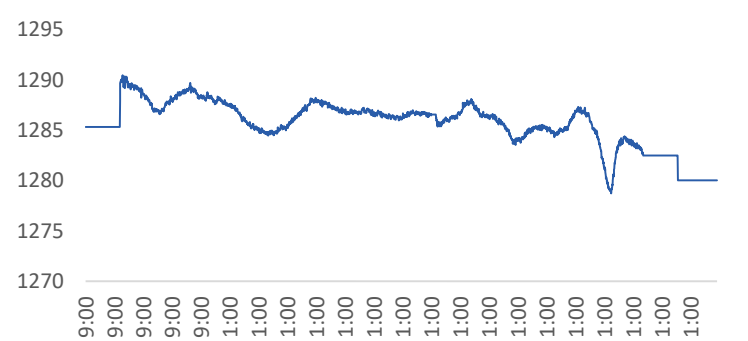
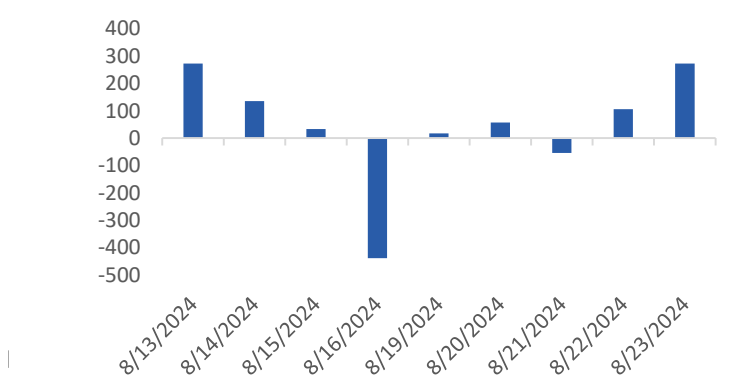


Figure 3
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VNM	73.40	-2.00%	-0.75	2.09
MSN	76.20	-2.18%	-0.58	1.44
FPT	131.50	-1.20%	-0.56	1.46
VCB	92.00	-0.43%	-0.54	5.59
PNJ	102.60	-5.79%	-0.49	0.33

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
HUT	17.30	-1.70%	-0.19	0.89
IDC	60.70	-1.30%	-0.19	0.33
NTP	67.70	-2.45%	-0.16	0.13
MVB	19.10	-8.17%	-0.12	0.11
NVB	9.40	-2.08%	-0.08	0.56

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
HVN	10.00	-6.98%	-0.01	1.92
HAG	10.75	-6.93%	-0.19	35.41
HHS	8.61	-6.92%	-0.05	3.41
NHA	23.55	-6.92%	-0.02	1.42
DXV	4.59	-6.90%	0.00	0.01

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
DAE	12.80	-9.86%	-0.01	0.00
HMR	21.10	-9.83%	-0.04	0.20
CMS	18.40	-9.80%	-0.17	0.61
TXM	6.50	-9.72%	-0.02	0.04
MCO	12.20	-9.63%	-0.02	0.05

Figure 2
HNX-Index Intraday

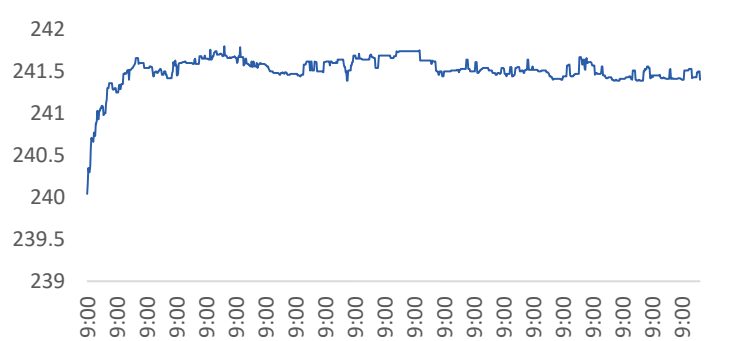
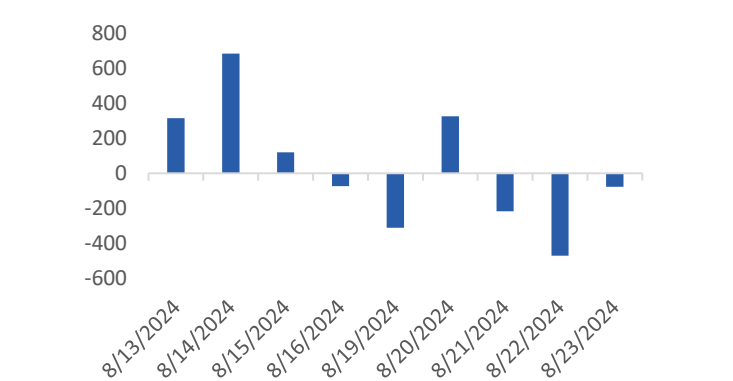


Figure 4
Foreign transactions



Source: FiinProX, BSC Research

BSC30 PORTFOLIO

Stocks	Sector	Close (1,000 VND)	% Day	Beta	MC (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	TP (VND)	Foreign ownershi- p	Link
VCB	Bank	92.0	-0.40%	0.6	20,601	5.8	5,962	15.4	105,000	23.3%	Link
BID	Bank	50.2	-0.60%	1.1	11,465	4.5	4,006	12.5	54,578	17.2%	Link
VPB	Bank	19.0	1.30%	1.0	6,039	30.2	1,460	13.0	23,685	26.1%	Link
TCB	Bank	22.5	0.40%	1.2	6,351	15.3	3,047	7.4	-	20.9%	Link
MBB	Bank	24.4	-0.40%	1.0	5,198	10.0	4,018	6.1	24,400	23.2%	Link
STB	Bank	29.8	-0.70%	1.2	2,247	9.2	4,340	6.9	31,200	22.9%	Link
CTG	Bank	34.6	-1.00%	1.3	7,444	13.3	3,782	9.1	19,100	26.3%	Link
ACB	Bank	24.4	0.00%	0.7	4,375	4.8	3,676	6.7	42,500	30.0%	Link
SSI	Broker	34.0	1.00%	1.3	2,053	27.0	1,882	18.0	45,900	41.3%	Link
IDC	IP	60.7	-1.30%	1.1	802	2.1	5,573	10.9	-	24.5%	Link
HPG	Material	26.0	-0.20%	1.2	6,663	22.5	1,746	14.9	23,300	23.7%	Link
HSG	Material	21.0	-0.90%	1.7	518	11.5	1,844	11.4	79,900	17.3%	Link
VHM	RE	40.5	1.90%	1.0	7,065	25.4	5,326	7.6	38,900	14.2%	Link
KDH	RE	37.7	0.80%	1.3	1,374	2.8	765	49.3	44,100	38.1%	Link
NLG	RE	40.6	-0.10%	1.3	627	1.7	1,102	36.9	46,100	48.8%	Link
DGC	Chemicals	111.0	-1.70%	1.5	1,689	5.7	7,898	14.1	85,000	18.1%	Link
DCM	Fertilizer	36.8	-1.90%	1.3	780	6.2	2,828	13.0	41,000	7.4%	Link
GAS	O&G	84.2	-0.60%	0.6	7,748	4.1	4,760	17.7	36,000	1.9%	Link
PVS	O&G	40.2	-0.50%	1.0	770	4.5	1,932	20.8	110,500	22.1%	Link
PVD	O&G	27.6	-1.10%	1.3	615	5.8	1,150	24.0	45,000	15.6%	Link
POW	Utilities	13.4	-1.10%	0.7	1,257	3.5	467	28.7	38,500	4.1%	Link
VHC	Fishery	74.4	1.20%	1.2	669	3.2	3,216	23.1	29,000	29.8%	Link
GMD	Logistics	81.1	-1.50%	0.9	1,009	3.2	3,966	20.4	14,500	48.6%	Link
VNM	Retail	73.4	-2.00%	0.6	6,146	18.6	4,633	15.8	81,700	51.5%	Link
MSN	Retail	76.2	-2.20%	1.2	4,619	24.4	466	163.4	27,700	28.6%	Link
MWG	Retail	69.8	-0.30%	1.3	4,088	16.7	1,507	46.3	63,800	46.9%	Link
PNJ	Retail	102.6	-5.80%	1.0	1,375	23.2	6,133	16.7	83,500	49.0%	Link
DGW	Retail	60.8	-1.80%	1.7	407	3.8	2,237	27.2	90,900	25.1%	Link
FPT	Tech	131.5	-1.20%	1.1	7,694	13.6	4,890	26.9	57,000	45.2%	Link
CTR	Tech	126.9	-1.30%	1.3	582	1.2	4,590	27.6	108,000	9.4%	Link

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 (1,000 VND)	% Day	Beta	MC (Mil USD)	Liquidity (Mil USD)	EPS fw (VND)	P/E fw	P/B	Foreign ownershi- p	ROE (%)
HDB	Bank	27.1	0.00%	0.9	3,162	6.7	4,137	6.6	1.6	19.5%	25.4%
VIB	Bank	18.4	-0.30%	1.1	2,182	2.3	3,048	6.0	1.2	20.5%	24.3%
TPB	Bank	17.8	-0.60%	1.3	1,570	8.4	2,154	8.3	1.1	28.4%	13.7%
MSB	Bank	14.9	0.00%	1.1	1,194	6.1	2,366	6.3	0.9	29.5%	16.0%
EIB	Bank	18.8	-0.30%	0.9	1,311	4.2	1,273	14.8	1.4	2.8%	10.1%
HCM	Broker	29.7	3.30%	1.7	838	27.2	1,397	21.3	2.0	45.3%	8.3%
VCI	Broker	48.5	2.10%	1.7	859	13.9	1,763	27.5	2.4	20.1%	7.1%
VND	Broker	15.7	0.60%	1.5	958	10.8	1,591	9.9	1.4	13.5%	13.1%
BSI	Broker	49.8	-1.10%	1.7	446	1.6	2,165	23.0	2.1	40.0%	9.0%
SHS	Broker	16.7	-0.60%	1.7	544	7.5	1,338	12.5	1.2	8.9%	5.7%
CTD	Const	64.3	0.90%	1.2	257	1.3	2,996	21.5	0.7	47.1%	2.3%
HHV	Const	12.0	-0.40%	1.5	207	1.7	860	13.9	0.6	7.7%	4.2%
LCG	Const	11.1	0.50%	1.5	86	1.2	771	14.4	0.8	2.1%	4.6%
SZC	IP	37.6	-1.10%	1.1	271	1.5	1,549	24.3	2.3	3.2%	13.4%
SIP	IP	75.4	0.30%	1.4	632	3.1	5,925	12.7	3.5	2.0%	26.9%
PHR	IP	56.2	-0.90%	1.0	305	0.4	3,028	18.6	2.0	18.5%	18.3%
DIG	RE	25.1	-0.20%	1.8	613	11.9	152	165.5	2.0	4.7%	2.1%
CEO	RE	16.7	-1.20%	1.9	362	4.1	313	53.3	1.4	4.8%	2.4%
KBC	IP	26.7	-0.90%	1.5	821	2.9	295	90.6	1.1	20.5%	11.7%
VGC	IP	44.6	0.30%	1.2	800	1.9	1,776	25.1	2.5	4.7%	12.5%
GVR	IP	35.0	-1.10%	1.6	5,617	2.8	704	49.8	2.7	0.5%	6.2%
NKG	Material	21.9	-1.10%	1.7	231	5.0	1,580	13.9	1.0	13.1%	2.3%
BMP	Material	104.5	-0.70%	1.2	343	0.8	11,420	9.2	3.2	82.6%	39.1%
IJC	RE	14.4	1.10%	1.4	218	1.6	683	21.1	1.1	4.6%	10.3%
DXG	RE	15.8	-0.60%	1.6	456	10.1	249	63.5	1.1	15.4%	1.1%
VRE	RE	19.8	1.80%	1.3	1,807	8.3	1,975	10.0	1.1	22.2%	12.4%
PDR	RE	21.9	1.40%	1.8	766	10.9	557	39.3	1.7	6.4%	7.2%
DIG	RE	25.1	-0.20%	1.8	613	11.9	152	165.5	2.0	4.7%	2.1%
HUT	Const	17.3	-1.70%	1.2	619	0.8	64	269.8	1.8	1.5%	0.7%
C4G	Const	9.4	0.00%	1.3	-	0.2	507	18.5	0.9	0.0%	4.9%
CSV	Chemicals	38.2	-2.30%	1.7	169	4.2	4,748	8.0	1.1	3.8%	16.1%
DHC	Chemicals	38.3	-0.30%	1.2	124	0.1	3,067	12.5	1.6	39.2%	17.2%
DRC	Tyre	33.5	-0.40%	0.8	159	0.4	2,509	13.4	2.1	11.7%	13.2%
PC1	Utlilities	29.6	0.20%	1.3	368	3.1	892	33.1	1.7	13.8%	4.1%
HDG	Utlilities	28.6	-0.50%	1.4	385	5.5	1,989	14.4	1.6	15.7%	12.9%
GEX	Utlilities	21.6	0.00%	1.7	737	7.0	1,245	17.3	1.4	8.3%	4.1%
QTP	Utlilities	14.8	-0.70%	0.6	-	0.1	1,357	10.9	1.2	1.2%	10.8%
PLX	O&G	48.6	-0.90%	0.9	2,471	2.8	2,874	16.9	2.4	18.2%	10.7%
BSR	O&G	23.9	-0.40%	1.0	-	7.5	2,408	9.9	1.3	0.7%	15.6%
PLC	O&G	26.1	-0.40%	1.4	84	0.1	728	35.9	1.7	0.5%	8.4%
ANV	Fishery	32.6	-0.90%	1.4	174	0.8	262	124.1	1.5	1.0%	1.5%
PTB	Material	66.3	0.00%	0.8	178	0.3	4,903	13.5	1.6	24.9%	10.6%
VSC	Logistics	19.0	0.00%	1.4	203	2.4	713	26.7	1.2	3.1%	6.2%
HAH	Logistics	41.8	-0.10%	1.3	203	6.7	2,800	14.9	1.8	7.7%	12.1%
VTP	Logistics	76.0	0.00%	1.5	371	1.1	2,943	25.8	5.8	6.9%	25.6%
DBC	Retail	27.6	-1.80%	1.7	356	2.8	979	28.1	1.4	12.1%	0.5%
FRT	Retail	182.9	-1.60%	0.7	998	4.8	(414)	-441.4	15.0	36.1%	11.8%
QNS	Retail	49.0	0.40%	0.6	-	0.3	6,678	7.3	2.0	13.8%	27.3%
TNG	Textile	27.6	-2.50%	1.2	136	2.8	2,254	12.2	1.7	19.5%	12.5%
PVT	Logistics	28.6	-0.70%	1.0	408	3.4	2,802	10.2	1.4	13.2%	14.3%
DPM	Fertilizer	34.9	-2.20%	1.3	547	6.0	1,703	20.5	1.2	8.8%	4.2%
REE	Utlilities	70.0	-0.80%	1.0	1,321	1.9	3,804	18.4	1.9	49.0%	13.9%

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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