

STOCK MARKET

The VN-Index traded within the 1,280 range throughout the day before closing at 1,280.56 points, remaining unchanged compared to yesterday. Market breadth leaned towards the negative with 12 out of 18 sectors declining, led by the Media, followed by the Financial Services. On the other hand, the Real Estate saw the strongest gains, with the Oil and Gas also experiencing a positive trading session. Regarding foreign trading, there was net selling on both the HSX and HNX exchanges today. The market is likely to continue moving sideways in the short term until a directional candlestick appears with supportive trading volume.

FUTURES CONTRACTS

Futures contracts increased according to the movement of VN30, except for VN30F2503.

COVERED WARRANTS

During the trading session on 27/08/2024, warrants fluctuated according to the correction of the underlying stocks.

HIGHLIGHT

- VN-Index **+0.54** points, closing at **1280.56** points. HNX-Index **-0.06** points, closing at **238.91** points.
- Pulling the index up: **VIC (+2.94)**, **VHM (+0.97)**, **FPT (+0.36)**, **CTG (+0.33)**, **TCB (+0.26)**.
- Pulling the index down: **BID (-0.83)**, **VCB (-0.67)**, **GAS (-0.39)**, **HPG (-0.39)**, **SSB (-0.27)**.
- The matched trade value of VN-Index reached VND **14,386** billion, decreased **-13.13%** compared to the previous session. The total transaction value reached VND 16,149 billion.
- The trading range is 8.22 points. The market had **169** gainers, 73 remaining unchanged, **235** losers.
- Foreign investors' net selling value: VND **-255.01** billion on HOSE, including **TLG (VND -173.11 billion)**, **HPG (VND -83.48 billion)**, **VPB (VND -60.70 billion)**, **FRT (VND -43.37 billion)**, **KDH (VND -32.09 billion)**. Foreign investors were net sellers on HNX with the value of VND **-28.24** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.57%**. Positive stocks: **VHM (+2.96%)**, **KDH (+0.66%)**, **NLG (+0.62%)**.
- BSC50 **-0.44%**. Positive stocks: **VRE (+1.76%)**, **TNG (+1.45%)**, **CSV (+1.31%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.57%	-0.44%	0.04%	0.28%
1 week	0.24%	0.21%	0.59%	1.02%
1 months	3.72%	4.45%	3.42%	2.88%
3 months	-3.62%	-7.76%	-4.20%	-2.38%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,280.56	238.91	94.15
% 1D	0.04%	-0.03%	-0.01%
TV (bil VND)	14,386	895	612
%1D	-13.13%	-15.12%	2.40%
Foreign (bil VND)	-255.01	-28.24	26.57

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FPT	121.68	TLG	-173.11
MWG	81.27	HPG	-83.48
VIC	63.70	VPB	-60.70
CTG	60.07	FRT	-43.37
DXG	35.40	KDH	-32.09

Overview of global stock markets

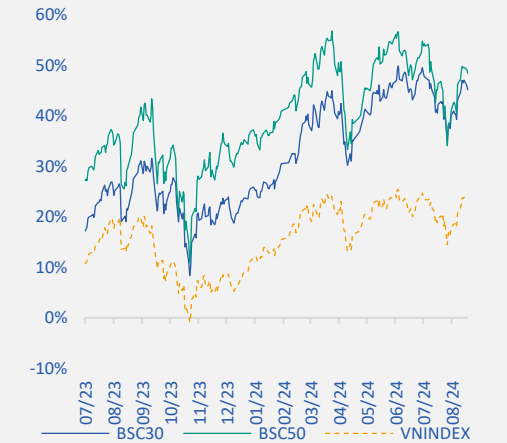
		%D	%W
SPX	5,617	-0.32%	0.15%
FTSE100	8,380	0.63%	0.28%
Eurostoxx	4,914	0.31%	1.08%
Shanghai	2,849	-0.24%	-0.63%
Nikkei	38,332	0.72%	0.60%

Source: Bloomberg

	Close	%
Commodities		
Brent	80	-0.02%
Gold	2,518	-1.35%
Exchange rate		
USD/VND	25,000	-0.20%
EUR/VND	28,501	-0.36%
JPY/VND	175	-1.13%
Interest rates		
10Y-Gov bond rate	2.75%	0.01%
1M-interbank rate	4.60%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

Contents

Market outlook	Page 1
Market statistics	Page 2
BSC30	Page 3
BSC50	Page 4
Disclaimer	Page 5

MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
VIC	45.10	7.00%	2.94	3.82
VHM	41.40	2.22%	0.97	4.35
FPT	132.50	0.76%	0.36	1.46
CTG	34.85	0.72%	0.33	5.37
TCB	22.65	0.67%	0.26	7.05

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	55.80	9.84%	0.79	0.20
NTP	70.40	3.99%	0.26	0.13
IDC	61.00	0.49%	0.07	0.33
PRE	19.40	4.86%	0.07	0.10
BAB	12.00	0.84%	0.07	0.90

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

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
BID	49.60	-1.20%	-0.83	5.70
VCB	91.50	-0.54%	-0.67	5.59
GAS	83.50	-0.83%	-0.39	2.30
HPG	25.75	-0.96%	-0.39	6.40
SSB	19.40	-2.27%	-0.27	2.50

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
SHS	16.40	-1.80%	-0.17	0.81
PGS	32.10	-5.59%	-0.06	0.05
HUT	17.20	-0.58%	-0.06	0.89
VIF	17.90	-1.10%	-0.05	0.35
WCS	256.50	-10.00%	-0.05	0.00

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 1
HSX-Index Intraday

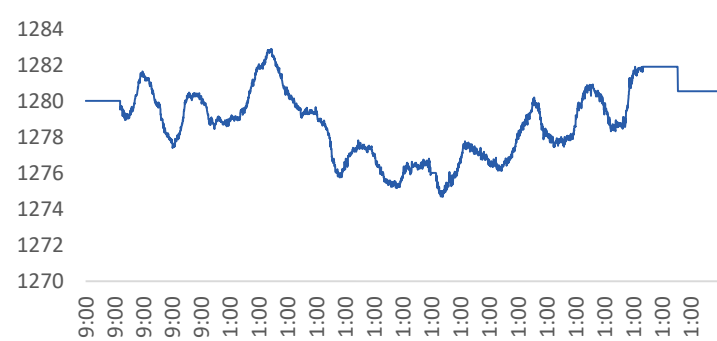


Figure 2
HNX-Index Intraday

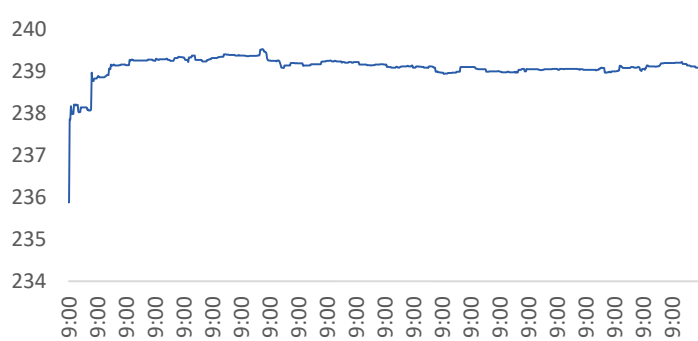
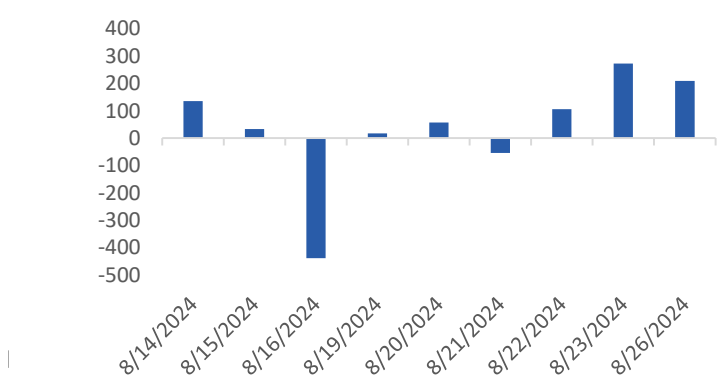
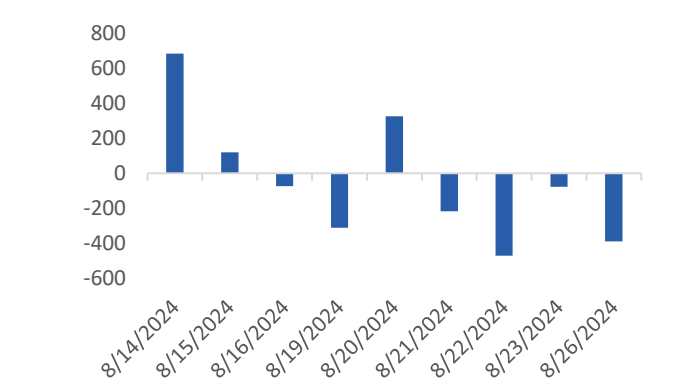


Figure 3
Proprietary trading



Source: FiinProX, BSC Research

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	91.5	-0.50%	0.6	20,485	3.3	5,962	15.3	105,000	23.4%	Link
BID	Bank	49.6	-1.20%	1.1	11,326	8.3	4,006	12.4	54,578	17.2%	Link
VPB	Bank	19.0	0.00%	1.0	6,038	11.7	1,460	13.0	23,685	26.1%	Link
TCB	Bank	22.6	0.70%	1.2	6,392	13.7	3,047	7.4	-	20.9%	Link
MBB	Bank	24.4	-0.20%	1.0	5,186	9.9	4,018	6.1	24,400	23.2%	Link
STB	Bank	29.6	-0.50%	1.2	2,235	5.0	4,340	6.8	31,200	23.2%	Link
CTG	Bank	34.8	0.70%	1.3	7,496	16.3	3,782	9.2	19,100	296.5%	Link
ACB	Bank	24.4	0.00%	0.7	4,374	4.1	3,676	6.7	42,500	30.0%	Link
SSI	Broker	33.4	-1.60%	1.3	2,019	13.3	1,882	17.8	45,900	41.3%	Link
IDC	IP	61.0	0.50%	1.1	806	2.4	5,573	10.9	-	24.4%	Link
HPG	Material	25.8	-1.00%	1.2	6,597	12.8	1,746	14.7	23,300	23.5%	Link
HSG	Material	20.8	-1.00%	1.7	513	5.2	1,844	11.3	79,900	16.2%	Link
VHM	RE	41.4	2.20%	1.0	7,221	30.2	5,326	7.8	38,900	14.1%	Link
KDH	RE	37.5	-0.50%	1.3	1,366	5.6	765	49.0	44,100	38.1%	Link
NLG	RE	40.7	0.10%	1.3	627	2.5	1,102	36.9	46,100	48.6%	Link
DGC	Chemicals	109.6	-1.30%	1.5	1,667	7.8	7,898	13.9	85,000	18.3%	Link
DCM	Fertilizer	37.2	1.00%	1.3	788	3.5	2,828	13.1	41,000	7.3%	Link
GAS	O&G	83.5	-0.80%	0.6	7,682	6.0	4,760	17.5	36,000	1.9%	Link
PVS	O&G	40.2	0.00%	1.0	770	2.6	1,932	20.8	110,500	22.2%	Link
PVD	O&G	27.4	-0.70%	1.3	610	3.2	1,150	23.8	45,000	15.1%	Link
POW	Utilities	13.4	0.40%	0.7	1,262	3.2	467	28.8	38,500	4.1%	Link
VHC	Fishery	73.5	-1.20%	1.2	661	1.1	3,216	22.9	29,000	30.1%	Link
GMD	Logistics	80.3	-1.00%	0.9	999	2.6	3,966	20.2	14,500	48.6%	Link
VNM	Retail	73.5	0.10%	0.6	6,153	12.6	4,633	15.9	81,700	51.6%	Link
MSN	Retail	76.8	0.80%	1.2	4,654	16.1	466	164.7	27,700	26.1%	Link
MWG	Retail	69.8	0.00%	1.3	4,087	40.5	1,507	46.3	63,800	46.9%	Link
PNJ	Retail	103.0	0.40%	1.0	1,380	9.5	6,133	16.8	83,500	49.0%	Link
DGW	Retail	60.8	0.00%	1.7	407	3.0	2,237	27.2	90,900	25.1%	Link
FPT	Tech	132.5	0.80%	1.1	7,751	12.4	4,890	27.1	57,000	45.5%	Link
CTR	Tech	127.0	0.10%	1.3	582	0.8	4,590	27.7	108,000	9.3%	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	5.7	4,137	6.6	1.6	19.3%	25.4%
VIB	Bank	18.3	-0.30%	1.1	2,176	2.5	3,048	6.0	1.2	4.3%	24.3%
TPB	Bank	17.8	-0.30%	1.3	1,565	3.2	2,154	8.2	1.1	28.5%	13.7%
MSB	Bank	14.8	-0.30%	1.1	1,190	7.2	2,366	6.3	0.9	29.5%	16.0%
EIB	Bank	18.8	-0.30%	0.9	1,308	2.2	1,273	14.7	1.4	2.8%	10.1%
HCM	Broker	29.2	-1.70%	1.7	823	10.6	1,397	20.9	1.9	45.7%	8.3%
VCI	Broker	48.0	-0.90%	1.7	850	6.7	1,763	27.3	2.4	20.5%	7.1%
VND	Broker	15.4	-1.60%	1.5	942	6.4	1,591	9.7	1.4	13.4%	13.1%
BSI	Broker	49.5	-0.70%	1.7	442	0.9	2,165	22.9	2.0	40.0%	9.0%
SHS	Broker	16.4	-1.80%	1.7	534	3.4	1,338	12.3	1.2	8.9%	5.7%
CTD	Const	64.2	-0.20%	1.2	257	0.8	2,996	21.4	0.7	46.9%	2.3%
HHV	Const	11.8	-0.80%	1.5	205	1.7	860	13.8	0.6	7.8%	4.2%
LCG	Const	11.0	-0.90%	1.5	85	1.1	771	14.3	0.8	2.2%	4.6%
SZC	IP	37.3	-0.80%	1.1	269	1.4	1,549	24.1	2.3	3.1%	13.4%
SIP	IP	76.0	0.80%	1.4	636	1.3	5,925	12.8	3.5	2.1%	26.9%
PHR	IP	56.7	0.90%	1.0	308	0.5	3,028	18.7	2.0	18.5%	18.3%
DIG	RE	25.0	-0.20%	1.8	612	15.9	152	165.1	2.0	4.3%	2.1%
CEO	RE	16.7	0.00%	1.9	362	3.7	313	53.3	1.4	4.6%	2.4%
KBC	IP	26.8	0.20%	1.5	822	2.6	295	90.8	1.1	20.6%	11.7%
VGC	IP	44.7	0.30%	1.2	803	1.1	1,776	25.2	2.5	4.6%	12.5%
GVR	IP	35.0	-0.30%	1.6	5,600	2.0	704	49.6	2.7	0.5%	6.2%
NKG	Material	21.8	-0.50%	1.7	230	3.2	1,580	13.8	1.0	12.8%	2.3%
BMP	Material	104.8	0.30%	1.2	344	0.5	11,420	9.2	3.2	82.9%	39.1%
IJC	RE	14.2	-1.40%	1.4	215	1.0	683	20.8	1.1	4.6%	10.3%
DXG	RE	16.0	1.30%	1.6	462	22.9	249	64.3	1.1	15.2%	1.1%
VRE	RE	20.0	1.00%	1.3	1,825	12.1	1,975	10.2	1.1	22.2%	12.4%
PDR	RE	21.8	-0.70%	1.8	761	10.4	557	39.0	1.7	6.8%	7.2%
DIG	RE	25.0	-0.20%	1.8	612	15.9	152	165.1	2.0	4.3%	2.1%
HUT	Const	17.2	-0.60%	1.2	615	0.8	64	268.2	1.8	0.0%	0.7%
C4G	Const	9.4	0.00%	1.3	-	0.1	507	18.5	0.9	0.0%	4.9%
CSV	Chemicals	38.8	1.40%	1.7	172	2.5	4,748	8.2	1.1	2.8%	16.1%
DHC	Chemicals	38.2	-0.40%	1.2	123	0.1	3,067	12.4	1.6	39.3%	17.2%
DRC	Tyre	33.6	0.30%	0.8	160	0.2	2,509	13.4	2.1	11.7%	13.2%
PC1	Utlilities	29.0	-1.90%	1.3	361	2.5	892	32.5	1.7	13.9%	4.1%
HDG	Utlilities	28.2	-1.20%	1.4	381	5.9	1,989	14.2	1.6	15.6%	12.9%
GEX	Utlilities	21.6	0.00%	1.7	737	4.3	1,245	17.3	1.4	8.3%	4.1%
QTP	Utlilities	14.8	0.00%	0.6	-	0.1	1,357	10.9	1.2	1.2%	10.8%
PLX	O&G	49.1	1.10%	0.9	2,499	2.4	2,874	17.1	2.5	18.1%	10.7%
BSR	O&G	24.3	1.70%	1.0	-	7.5	2,408	10.1	1.3	0.0%	15.6%
PLC	O&G	26.1	0.00%	1.4	84	0.1	728	35.9	1.7	0.5%	8.4%
ANV	Fishery	32.5	-0.20%	1.4	173	0.7	262	123.9	1.5	1.0%	1.5%
PTB	Material	66.3	0.00%	0.8	178	0.1	4,903	13.5	1.6	24.9%	10.6%
VSC	Logistics	18.8	-1.10%	1.4	201	1.9	713	26.4	1.2	3.1%	6.2%
HAH	Logistics	41.2	-1.30%	1.3	200	5.3	2,800	14.7	1.8	7.6%	12.1%
VTP	Logistics	75.5	-0.70%	1.5	368	1.2	2,943	25.7	5.7	6.9%	25.6%
DBC	Retail	28.1	2.00%	1.7	363	5.1	979	28.7	1.4	9.1%	0.5%
FRT	Retail	179.2	-2.00%	0.7	978	8.4	(414)	-432.5	14.7	36.5%	11.8%
QNS	Retail	48.7	-0.60%	0.6	-	0.3	6,678	7.3	2.0	12.2%	27.3%
TNG	Textile	28.0	1.40%	1.2	138	2.9	2,254	12.4	1.8	15.7%	12.5%
PVT	Logistics	28.8	0.50%	1.0	410	1.1	2,802	10.3	1.5	13.1%	14.3%
DPM	Fertilizer	35.0	0.30%	1.3	549	4.1	1,703	20.6	1.2	8.9%	4.2%
REE	Utlilities	68.6	-2.00%	1.0	1,294	1.9	3,804	18.0	1.8	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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