

### STOCK MARKET

The VN-Index continued to move sideways today, closing at 1,281.47 points. The market breadth leaned towards the negative, with 11 out of 18 sectors declining, led by the Oil and Gas. On the other hand, the Tourism and Leisure experienced the strongest gains. Regarding foreign investors' trading activities, they were net sellers on the HSX and net buyers on the HNX. The sideways trend around the 1,280 level shows no signs of ending. Prolonged fluctuations within a narrow range could negatively impact market sentiment. Investors are advised to trade cautiously in the upcoming sessions.

### FUTURES CONTRACTS

Futures contracts increased according to the movement of VN30, except for VN30F2412.

### COVERED WARRANTS

During the trading session on 29/08/2024, warrants fluctuated according to the correction of the underlying stocks.

### HIGHLIGHT

- VN-Index **+0.03** points, closing at **1281.47** points. HNX-Index **-0.35** points, closing at **237.88** points.
- Pulling the index up: **VHM (+0.65)**, **VCB (+0.55)**, **BCM (+0.52)**, **STB (+0.43)**, **MBB (+0.26)**.
- Pulling the index down: **BID (-0.41)**, **GVR (-0.34)**, **GAS (-0.22)**, **VNM (-0.20)**, **EIB (-0.19)**.
- The matched trade value of VN-Index reached VND 12,688 billion, decreased **-14.47%** compared to the previous session. The total transaction value reached VND 13,986 billion.
- The trading range is 7.96 points. The market had **174** gainers, 92 remaining unchanged, **214** losers.
- Foreign investors' net selling value: **VND -116.66 billion** on HOSE, including **HPG (VND -129.62 billion)**, **VCI (VND -90.27 billion)**, **VRE (VND -84.46 billion)**, **TCB (VND -46.00 billion)**, **VPB (VND -43.68 billion)**. Foreign investors were net buyers on HNX with the value of **VND 19.27 billion**.

### BSC30, BSC50 PERFORMANCE

- BSC30 **+0.33%**. Positive stocks: **STB (+4.23%)**, **MBB (+1.22%)**, **VCB (+1.10%)**.
- BSC50 **-0.16%**. Positive stocks: **VND (+1.95%)**, **BSI (+1.84%)**, **HDB (+1.66%)**.

#### Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.33%	-0.16%	0.00%	0.24%
1 week	-0.30%	-0.67%	-0.10%	0.38%
1 months	5.23%	6.38%	4.84%	4.21%
3 months	-4.85%	-9.13%	-4.97%	-3.27%

#### Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,281.47	237.88	93.85
% 1D	0.00%	-0.15%	-0.30%
TV (bil VND)	12,688	592	396
%1D	-14.47%	-40.28%	-27.33%
Foreign (bil VND)	-116.66	19.27	-0.38

#### Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FPT	138.99	HPG	-186.84
VNM	65.67	HSG	-73.57
SSI	48.61	VHM	-52.44
MSN	38.35	VPB	-40.07
PDR	37.03	HDB	-37.96

#### Overview of global stock markets

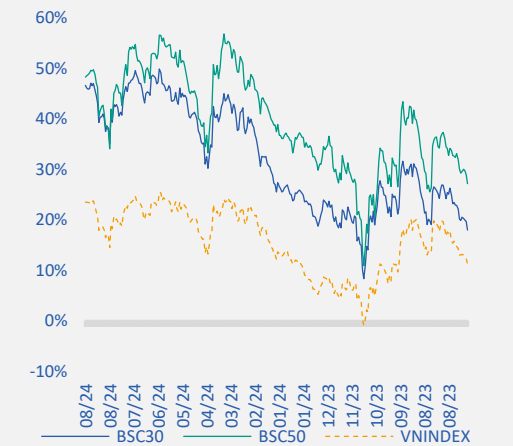
		%D	%W
SPX	5,592	-0.60%	-0.51%
FTSE100	8,368	0.29%	1.02%
Eurostoxx	4,957	0.72%	1.37%
Shanghai	2,823	-0.50%	-0.90%
Nikkei	38,358	-0.05%	0.39%

Source: Bloomberg

	Close	%
<b>Commodities</b>		
Brent	78	0.48%
Gold	2,518	0.68%
<b>Exchange rate</b>		
USD/VND	25,050	0.12%
EUR/VND	28,461	-0.21%
JPY/VND	176	
<b>Interst rates</b>		
10Y-Gov bond rate	2.75%	
1M-interbank rate	4.60%	

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	41.50	1.47%	0.65	4.35
VCB	91.50	0.44%	0.55	5.59
BCM	71.50	2.88%	0.52	1.04
STB	30.45	3.05%	0.43	1.89
MBB	24.85	0.81%	0.26	5.31

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
VIF	18.00	1.69%	0.08	0.35
DHT	69.30	1.76%	0.07	0.08
BCF	38.50	5.48%	0.05	0.03
WCS	282.00	9.94%	0.05	0.00
IPA	13.60	2.26%	0.05	0.21

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	49.30	-0.60%	-0.41	5.70
GVR	35.30	-0.98%	-0.34	4.00
GAS	83.40	-0.48%	-0.22	2.30
VNM	73.50	-0.54%	-0.20	2.09
EIB	18.25	-2.41%	-0.19	1.74

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
KSV	57.30	-6.07%	-0.50	0.20
CEO	16.20	-1.82%	-0.11	0.54
MVB	18.90	-4.55%	-0.07	0.11
HUT	17.10	-0.58%	-0.06	0.89
VCS	67.00	-0.74%	-0.06	0.16

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

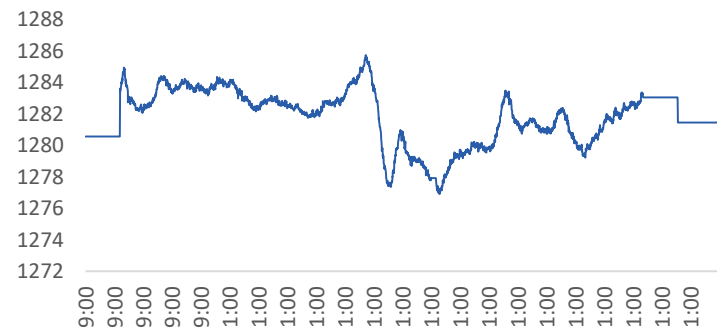


Figure 2  
HNX-Index Intraday

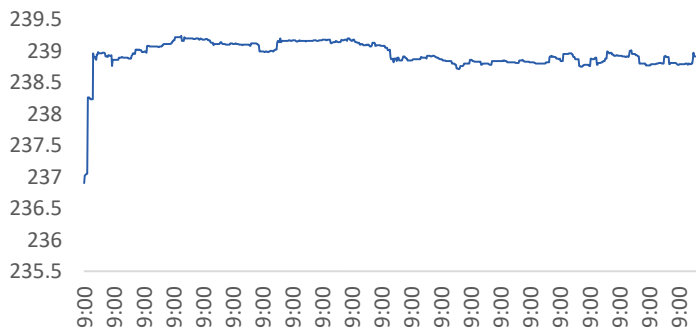


Figure 3  
Proprietary trading

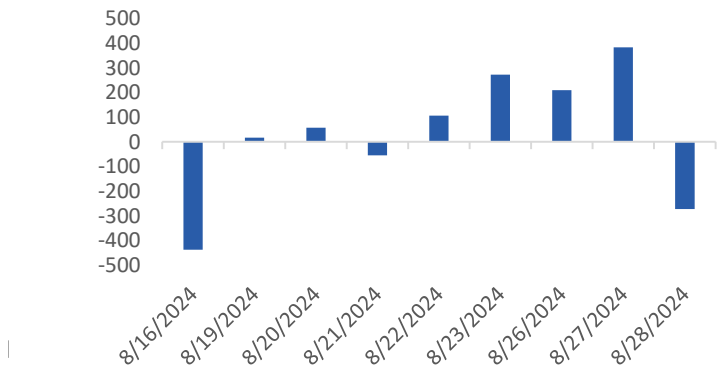
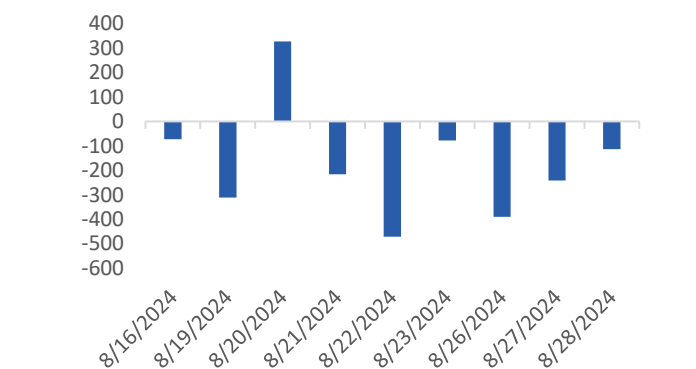


Figure 4  
Foreign transactions



Source: FiinProX, BSC Research

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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	0.40%	0.6	20,604	5.5	5,962	15.3	105,000	23.4%	<a href="#">Link</a>
BID	Bank	49.3	-0.60%	1.1	11,323	3.3	4,006	12.3	54,578	17.2%	<a href="#">Link</a>
VPB	Bank	19.0	0.00%	1.0	6,058	18.0	1,460	13.0	23,685	26.0%	<a href="#">Link</a>
TCB	Bank	23.0	0.00%	1.2	6,528	14.9	3,047	7.5	-	20.8%	<a href="#">Link</a>
MBB	Bank	24.8	0.80%	1.0	5,313	22.6	4,018	6.2	24,400	23.2%	<a href="#">Link</a>
STB	Bank	30.4	3.00%	1.2	2,313	30.9	4,340	7.0	31,200	23.2%	<a href="#">Link</a>
CTG	Bank	35.0	0.30%	1.3	7,572	17.7	3,782	9.3	19,100	296.5%	<a href="#">Link</a>
ACB	Bank	24.6	0.60%	0.7	4,436	8.5	3,676	6.7	42,500	30.0%	<a href="#">Link</a>
SSI	Broker	34.0	-0.30%	1.3	2,064	11.9	1,882	18.0	45,900	41.4%	<a href="#">Link</a>
IDC	IP	60.8	-0.20%	1.1	808	1.6	5,573	10.9	-	24.2%	<a href="#">Link</a>
HPG	Material	25.6	-0.40%	1.2	6,597	16.7	1,746	14.7	23,300	23.3%	<a href="#">Link</a>
HSG	Material	20.8	-0.50%	1.7	516	4.9	1,844	11.3	79,900	14.9%	<a href="#">Link</a>
VHM	RE	41.5	1.50%	1.0	7,281	15.6	5,326	7.8	38,900	14.0%	<a href="#">Link</a>
KDH	RE	37.7	0.70%	1.3	1,381	2.7	765	49.3	44,100	38.1%	<a href="#">Link</a>
NLG	RE	40.9	0.00%	1.3	634	1.3	1,102	37.1	46,100	48.9%	<a href="#">Link</a>
DGC	Chemicals	111.3	1.20%	1.5	1,703	5.0	7,898	14.1	85,000	18.3%	<a href="#">Link</a>
DCM	Fertilizer	37.4	0.90%	1.3	798	4.2	2,828	13.2	41,000	7.4%	<a href="#">Link</a>
GAS	O&G	83.4	-0.50%	0.6	7,718	3.1	4,760	17.5	36,000	1.9%	<a href="#">Link</a>
PVS	O&G	40.2	0.00%	1.0	774	2.0	1,932	20.8	110,500	21.9%	<a href="#">Link</a>
PVD	O&G	27.3	-1.10%	1.3	611	3.2	1,150	23.7	45,000	14.9%	<a href="#">Link</a>
POW	Utilities	13.6	-0.70%	0.7	1,278	2.6	467	29.0	38,500	4.1%	<a href="#">Link</a>
VHC	Fishery	74.1	-0.10%	1.2	670	1.0	3,216	23.0	29,000	30.1%	<a href="#">Link</a>
GMD	Logistics	80.2	0.00%	0.9	1,003	2.3	3,966	20.2	14,500	48.6%	<a href="#">Link</a>
VNM	Retail	73.5	-0.50%	0.6	6,189	6.0	4,633	15.9	81,700	51.6%	<a href="#">Link</a>
MSN	Retail	76.9	-0.30%	1.2	4,688	5.9	466	164.9	27,700	26.1%	<a href="#">Link</a>
MWG	Retail	69.1	-0.40%	1.3	4,070	11.8	1,507	45.8	63,800	47.1%	<a href="#">Link</a>
PNJ	Retail	101.0	-0.60%	1.0	1,361	4.2	6,133	16.5	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	60.8	0.00%	1.7	409	2.0	2,237	27.2	90,900	25.2%	<a href="#">Link</a>
FPT	Tech	133.7	0.30%	1.1	7,867	11.3	4,890	27.3	57,000	45.6%	<a href="#">Link</a>
CTR	Tech	125.7	-0.30%	1.3	579	0.6	4,590	27.4	108,000	9.2%	<a href="#">Link</a>

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	27.4	1.10%	0.9	3,209	8.2	4,137	6.6	1.6	19.2%	27.8%
VIB	Bank	18.3	0.00%	1.1	2,188	2.8	3,048	6.0	1.2	4.3%	21.4%
TPB	Bank	17.8	0.60%	1.3	1,583	5.3	2,154	8.3	1.1	28.5%	14.2%
MSB	Bank	11.6	-2.10%	1.1	1,210	4.0	2,366	4.9	0.7	22.7%	14.9%
EIB	Bank	18.2	-2.40%	0.9	1,280	10.9	1,273	14.3	1.4	2.8%	9.9%
HCM	Broker	29.2	-0.80%	1.7	828	7.2	1,397	20.9	1.9	45.7%	10.6%
VCI	Broker	46.3	-2.90%	1.7	824	18.0	1,763	26.3	2.3	20.7%	9.6%
VND	Broker	15.6	1.30%	1.5	957	6.3	1,591	9.8	1.4	13.3%	15.0%
BSI	Broker	49.0	0.50%	1.7	441	1.2	2,165	22.7	2.0	40.0%	9.3%
SHS	Broker	16.4	0.00%	1.7	537	2.5	1,338	12.3	1.2	8.9%	10.5%
CTD	Const	63.8	0.20%	1.2	257	0.7	2,996	21.3	0.7	46.7%	3.6%
HHV	Const	11.7	-0.40%	1.5	204	1.2	860	13.6	0.6	7.9%	4.4%
LCG	Const	10.8	-0.90%	1.5	84	0.7	771	14.0	0.8	2.2%	5.7%
SZC	IP	37.0	-0.50%	1.1	268	1.0	1,549	23.9	2.2	3.1%	12.1%
SIP	IP	75.9	0.00%	1.4	639	0.9	5,925	12.8	3.5	2.3%	29.0%
PHR	IP	59.0	1.40%	1.0	322	1.0	3,028	19.5	2.1	18.5%	12.1%
DIG	RE	23.8	-0.80%	1.8	586	10.5	152	157.2	1.9	4.1%	1.1%
CEO	RE	16.2	-1.80%	1.9	353	1.7	313	51.7	1.4	4.7%	2.1%
KBC	IP	26.6	-0.70%	1.5	823	1.2	300	88.7	1.1	20.6%	1.7%
VGC	IP	44.5	-0.90%	1.2	804	0.9	1,776	25.1	2.5	4.4%	8.2%
GVR	IP	35.3	-1.00%	1.6	5,689	1.2	704	50.1	2.8	0.5%	6.5%
NKG	Material	22.1	0.00%	1.7	234	2.1	1,580	14.0	1.0	12.6%	7.4%
BMP	Material	103.1	-0.90%	1.2	340	0.3	11,420	9.0	3.2	82.9%	34.6%
IJC	RE	14.0	-1.40%	1.4	212	1.8	683	20.4	1.1	4.5%	6.0%
DXG	RE	15.5	-2.20%	1.6	450	7.3	249	62.3	1.0	15.7%	1.9%
VRE	RE	19.2	-1.30%	1.3	1,762	9.8	1,975	9.7	1.1	22.2%	11.9%
PDR	RE	21.4	-2.10%	1.8	755	6.2	557	38.5	1.7	6.8%	5.0%
DIG	RE	23.8	-0.80%	1.8	586	10.5	152	157.2	1.9	4.1%	1.1%
HUT	Const	17.1	-0.60%	1.2	615	0.7	64	266.7	1.8	0.0%	1.7%
C4G	Const	9.1	-2.20%	1.3	-	0.3	507	17.9	0.8	0.0%	4.8%
CSV	Chemicals	38.6	-0.30%	1.7	172	1.4	4,748	8.1	1.1	2.5%	15.2%
DHC	Chemicals	38.1	0.00%	1.2	124	0.3	3,067	12.4	1.6	39.3%	13.3%
DRC	Tyre	34.2	0.00%	0.8	163	0.2	2,509	13.6	2.2	11.6%	16.5%
PC1	Ultilities	28.3	-1.60%	1.3	355	3.4	892	31.7	1.7	13.8%	6.1%
HDG	Ultilities	28.2	-0.40%	1.4	382	1.8	1,989	14.2	1.6	15.6%	11.8%
GEX	Ultilities	21.2	-1.40%	1.7	727	3.7	1,245	17.0	1.4	8.3%	7.0%
QTP	Ultilities	14.8	0.70%	0.6	-	0.1	1,357	10.9	1.2	1.2%	11.2%
PLX	O&G	48.8	-1.20%	0.9	2,498	1.4	2,874	17.0	2.5	18.2%	13.8%
BSR	O&G	23.9	-0.80%	1.0	-	3.3	2,408	9.9	1.3	0.0%	13.4%
PLC	O&G	25.6	-1.20%	1.4	83	0.1	728	35.2	1.7	0.5%	4.7%
ANV	Fishery	32.2	0.20%	1.4	173	0.5	262	122.9	1.5	1.0%	1.2%
PTB	Material	65.9	0.60%	0.8	178	0.1	4,903	13.4	1.6	24.9%	11.9%
VSC	Logistics	18.4	-0.80%	1.4	197	1.6	713	25.8	1.1	3.0%	7.3%
HAH	Logistics	41.0	-0.10%	1.3	201	2.2	2,800	14.7	1.8	7.8%	10.6%
VTP	Logistics	76.1	-0.10%	1.5	373	0.6	2,943	25.9	5.8	6.9%	22.8%
DBC	Retail	28.8	1.20%	1.7	374	9.7	979	29.4	1.4	9.0%	5.0%
FRT	Retail	180.0	0.40%	0.7	988	2.8	(414)	-434.4	14.7	36.4%	11.8%
QNS	Retail	47.9	-0.40%	0.6	-	0.1	6,678	7.2	1.9	12.2%	28.7%
TNG	Textile	27.7	-1.10%	1.2	137	1.8	2,254	12.3	1.7	15.8%	14.7%
PVT	Logistics	28.4	-0.90%	1.0	407	1.1	2,802	10.1	1.4	13.1%	14.2%
DPM	Fertilizer	34.8	0.10%	1.3	548	2.6	1,703	20.4	1.2	9.0%	5.5%
REE	Ultilities	69.0	0.60%	1.0	1,309	0.9	3,804	18.1	1.8	49.0%	10.0%

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.

DISCLAIMER

The information, statements, forecasts and projections contained herein, including any expression of opinion, are based upon sources believed to be reliable but their accuracy completeness or correctness are not guaranteed. Expressions of opinion herein were arrived at after due and careful consideration and they were based upon the best information then known to us, and in our opinion are fair and reasonable in the circumstances prevailing at the time. Expressions of opinion contained herein are subject to change without notice. This document is not, and should not be construed as, an offer or the solicitation of an offer to buy or sell any securities. BSC and other companies in the BSC and/or their officers, directors and employees may have positions and may affect transactions in securities of companies mentioned herein and may also perform or seek to perform investment banking services for these companies. This document is for private circulation only and is not for publication in the press or elsewhere. BSC accepts no liability whatsoever for any direct or consequential loss arising from any use of this or its content. The use of any information, statements forecasts and projections contained herein shall be at the sole discretion and risk of the user. No part of this material may be (i) copied, photocopied or duplicated in any form by any mean or (ii) redistributed without the prior written consent of BIDV Securities Company (BSC).

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