

STOCK MARKET

VN-Index traded in the range of 1,275 - 1,290 before falling sharply at the end of the session to 1,255. After that, the index rebounded and closed at 1,268.66, down more than 12 points compared to yesterday's session. Market breadth tilted to the negative side with 17/18 industries decreasing, of which the Chemical industry led the decline, followed by the Oil and Gas industry, etc. On the contrary, the Banking industry was the only industry that maintained its green and plays a supporting role for the market. Regarding foreign transactions, today they were net buyers on both HSX and HNX. Bottom-catching demand at 1,255 helped the index not fall further. However, liquidity in today's trading session increased dramatically, the index may continue to fall to the 1,250 - 1,255 range.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30, VN30F2408 fluctuated in opposite directions.

COVERED WARRANTS

During the trading session on 17/07/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

BSC30, BSC50 PERFORMANCE

- VN-Index **-12.52** points, closing at **1268.66** points. HNX-Index **-4.01** points, closing at **240.9** points.
- Pulling the index up: **TCB (+1.81)**, **MBB (+1.29)**, **BID (+1.21)**, **CTG (+0.67)**, **ACB (+0.45)**.
- Pulling the index down: **GVR (-2.43)**, **HVN (-1.09)**, **MSN (-0.76)**, **FPT (-0.74)**, **VHM (-0.63)**.
- The matched trade value of VN-Index reached VND **28,039** billion, increased **82.55%** compared to the previous session. The total transaction value reached VND 29,249 billion.
- The trading range is 34.34 points. The market had **109** gainers, 33 remaining unchanged, **369** losers.
- Foreign investors' net buying value: VND **538.00** billion on HOSE, including **MWG (VND 162.28 billion)**, **FPT (VND 161.01 billion)**, **VCB (VND 136.14 billion)**, **TCB (VND 102.03 billion)**, **BID (VND 94.01 billion)**. Foreign investors were net buyers on HNX with the value of VND **14.48** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.24%**. Positive stocks: **TCB(4.41%)**, **MBB(4.03%)**, **BID(1.80%)**.
- BSC50 **-0.46%**. Positive stocks: **BMP(2.28%)**, **HDB(1.82%)**, **VIB(1.41%)**.

Indices' performances

| | BSC30 | BSC50 | VN Index | VN30 Index |
|----------|--------|--------|----------|------------|
| 1 day | -0.24% | -0.46% | -0.98% | 0.16% |
| 1 week | -1.01% | -1.02% | -0.37% | -0.58% |
| 1 months | 1.09% | 2.62% | 0.71% | 0.41% |
| 3 months | 8.69% | 8.39% | 5.91% | 5.95% |

Overview of Vietnam stock market

| | VNI | HNX | UPCOM |
|-------------------|----------|--------|--------|
| Closed | 1,268.66 | 240.90 | 97.27 |
| % 1D | -0.98% | -1.64% | -1.01% |
| TV (bil VND) | 28,039 | 1,908 | 1,916 |
| %1D | 82.55% | 71.08% | 44.81% |
| Foreign (bil VND) | 538.00 | 14.48 | 56.60 |

Foreign transactions (Bil. VND)

| Top buy | Value | Top sell | Value |
|---------|--------|----------|---------|
| MWG | 162.28 | MSN | -104.62 |
| FPT | 161.01 | VHM | -45.01 |
| VCB | 136.14 | VND | -41.45 |
| TCB | 102.03 | CTR | -31.42 |
| BID | 94.01 | PVD | -26.91 |

Overview of global stock markets

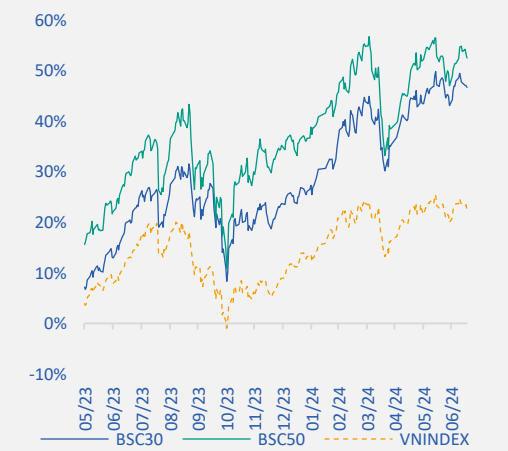
| | | %D | %W |
|-----------|--------|--------|--------|
| SPX | 5,667 | 0.64% | 1.62% |
| FTSE100 | 8,148 | -0.20% | -0.55% |
| Eurostoxx | 4,911 | -0.81% | -0.80% |
| Shanghai | 2,963 | -0.45% | 0.80% |
| Nikkei | 41,153 | -0.31% | -1.19% |

Source: Bloomberg

| | Close | % |
|-------------------|--------|--------|
| Commodities | | |
| Brent | 84 | -0.18% |
| Gold | 2,471 | 0.37% |
| Exchange rate | | |
| USD/VND | 25,468 | 0.04% |
| EUR/VND | 28,420 | 0.11% |
| JPY/VND | 161 | 2.13% |
| Interest rates | | |
| 10Y-Gov bond rate | 2.83% | 0.01% |
| 1M-interbank rate | 4.63% | |

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) |
|-----|-------|-------|----------|--------------|
| TCB | 23.70 | 4.41% | 1.81 | 7.05 |
| MBB | 24.50 | 4.03% | 1.29 | 5.31 |
| BID | 48.00 | 1.80% | 1.21 | 5.70 |
| CTG | 33.00 | 1.54% | 0.67 | 5.37 |
| ACB | 24.50 | 1.66% | 0.45 | 4.47 |

Top 5 leaders on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|-------|----------|--------------|
| VC3 | 27.70 | 4.92% | 0.11 | 0.11 |
| PGS | 31.00 | 6.16% | 0.07 | 0.05 |
| CLM | 91.00 | 9.38% | 0.07 | 0.01 |
| DHT | 74.00 | 1.23% | 0.06 | 0.08 |
| BTW | 42.70 | 9.77% | 0.03 | 0.01 |

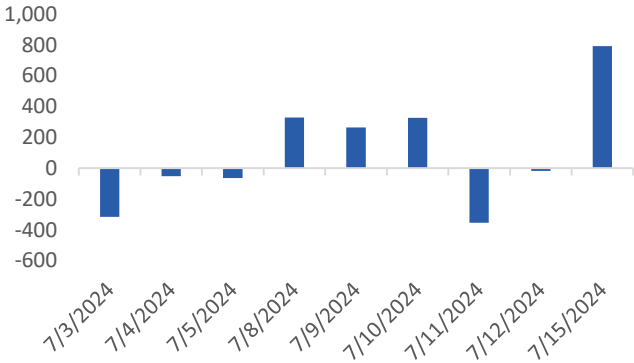
Top 5 gainers on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|-------|----------|--------------|
| HTV | 10.15 | 6.95% | 0.00 | 0.09 |
| HRC | 45.45 | 6.82% | 0.02 | 0.00 |
| DBT | 13.65 | 6.64% | 0.00 | 0.12 |
| LGC | 60.00 | 6.57% | 0.19 | 0.00 |
| PNC | 9.86 | 6.48% | 0.00 | 0.04 |

Top 5 gainers on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|-------|----------|--------------|
| BTW | 11.10 | 9.90% | 0.01 | 0.00 |
| ATS | 42.70 | 9.77% | 0.15 | 0.00 |
| CLM | 17.50 | 9.38% | 0.02 | 0.00 |
| PPE | 91.00 | 9.38% | 0.36 | 0.00 |
| TXM | 12.10 | 9.01% | 0.01 | 0.00 |

Figure 1
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|--------|--------|----------|--------------|
| GVR | 35.55 | -6.94% | -2.43 | 4.00 |
| HVN | 29.10 | -6.88% | -1.09 | 2.21 |
| MSN | 71.80 | -2.97% | -0.76 | 1.44 |
| FPT | 131.90 | -1.57% | -0.74 | 1.46 |
| VHM | 37.30 | -1.58% | -0.63 | 4.35 |

Top 5 laggards on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| PVS | 41.50 | -3.49% | -0.51 | 0.48 |
| IDC | 58.50 | -2.66% | -0.38 | 0.33 |
| HUT | 17.00 | -2.86% | -0.32 | 0.89 |
| VCS | 73.20 | -2.53% | -0.22 | 0.16 |
| LAS | 24.40 | -9.96% | -0.20 | 0.11 |

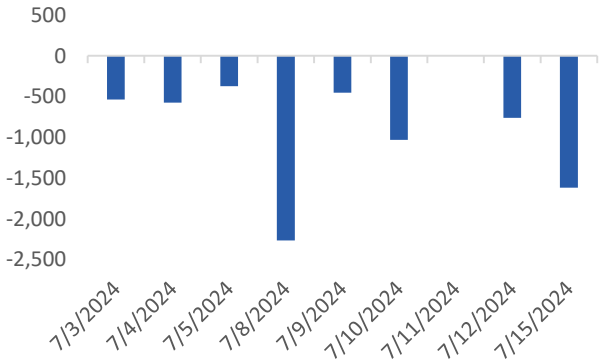
Top 5 losers on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| VOS | 23.25 | -7.00% | -0.03 | 1.93 |
| TNH | 25.95 | -6.99% | -0.05 | 2.24 |
| PAC | 46.70 | -6.97% | -0.04 | 0.15 |
| BFC | 42.10 | -6.96% | -0.04 | 2.32 |
| IMP | 86.90 | -6.96% | -0.11 | 0.39 |

Top 5 losers on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| LAS | 24.40 | -9.96% | -1.05 | 4.31 |
| CMS | 19.10 | -9.91% | -0.18 | 0.79 |
| HKT | 8.60 | -9.47% | -0.02 | 0.00 |
| DTD | 29.90 | -9.12% | -0.59 | 2.90 |
| VGS | 38.20 | -9.05% | -0.70 | 2.48 |

Figure 2
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 ownersh- p | Link |
|--------|-------------|-------------------------|--------|------|-----------------|------------------------|-----------------|--------|----------|--------------------------|----------------------|
| VCB | Bank | 88.0 | 0.10% | 0.6 | 19,394 | 11.7 | 5,838 | 15.1 | 105,000 | 23.2% | Link |
| BID | Bank | 48.0 | 1.80% | 1.1 | 10,790 | 14.9 | 3,841 | 12.5 | 54,578 | 17.2% | Link |
| VPB | Bank | 19.0 | 0.00% | 1.0 | 5,944 | 26.2 | 1,397 | 13.6 | 23,685 | 26.7% | Link |
| TCB | Bank | 23.7 | 4.40% | 1.1 | 6,584 | 25.6 | 5,600 | 4.2 | - | 21.8% | Link |
| MBB | Bank | 24.5 | 4.00% | 1.0 | 5,126 | 69.9 | 3,818 | 6.4 | 24,400 | 23.2% | Link |
| STB | Bank | 30.4 | 1.70% | 1.1 | 2,260 | 30.0 | 4,206 | 7.2 | 31,200 | 23.2% | Link |
| CTG | Bank | 33.0 | 1.50% | 1.3 | 6,988 | 29.4 | 3,751 | 8.8 | 19,100 | 26.1% | Link |
| ACB | Bank | 24.5 | 1.70% | 0.8 | 4,315 | 27.9 | 4,072 | 6.0 | 42,500 | 30.0% | Link |
| SSI | Securities | 34.2 | -0.70% | 1.2 | 2,032 | 19.3 | 1,704 | 20.0 | 45,900 | 42.6% | Link |
| IDC | IP | 58.5 | -2.70% | 1.2 | 761 | 4.6 | 5,880 | 9.9 | - | 24.1% | Link |
| HPG | Material | 28.2 | -0.90% | 1.2 | 7,112 | 28.4 | 1,601 | 17.6 | 23,300 | 24.4% | Link |
| HSG | Material | 23.7 | -2.50% | 1.7 | 576 | 21.5 | 1,423 | 16.7 | 79,900 | 20.4% | Link |
| VHM | Real estate | 37.3 | -1.60% | 1.0 | 6,404 | 10.3 | 5,074 | 7.4 | 38,900 | 15.7% | Link |
| KDH | Real estate | 36.9 | -2.40% | 1.4 | 1,163 | 9.6 | 726 | 50.9 | 44,100 | 39.6% | Link |
| NLG | Real estate | 42.0 | -4.50% | 1.3 | 637 | 6.8 | 1,040 | 40.4 | 46,100 | 49.4% | Link |
| DGC | Chemicals | 123.8 | -1.30% | 1.4 | 1,854 | 18.5 | 7,845 | 15.8 | 85,000 | 18.9% | Link |
| DCM | Fertilizer | 37.0 | -5.40% | 1.3 | 772 | 16.0 | 2,313 | 16.0 | 41,000 | 8.5% | Link |
| GAS | O&G | 78.0 | -0.40% | 0.6 | 7,064 | 4.8 | 4,688 | 16.6 | 36,000 | 1.9% | Link |
| PVS | O&G | 41.5 | -3.50% | 1.1 | 782 | 6.4 | 1,992 | 20.8 | 110,500 | 21.6% | Link |
| PVD | O&G | 28.5 | -4.00% | 1.3 | 625 | 5.8 | 1,200 | 23.7 | 45,000 | 16.2% | Link |
| POW | Utilities | 13.9 | -6.70% | 0.7 | 1,284 | 17.5 | 350 | 39.8 | 38,500 | 4.0% | Link |
| VHC | Fishery | 72.3 | -2.30% | 1.1 | 640 | 2.7 | 3,774 | 19.2 | 29,000 | 29.6% | Link |
| GMD | Logistics | 81.0 | -0.40% | 0.8 | 992 | 6.5 | 8,430 | 9.6 | 14,500 | 48.1% | Link |
| VNM | Retail | 65.7 | -0.60% | 0.6 | 5,414 | 9.0 | 4,408 | 14.9 | 81,700 | 50.1% | Link |
| MSN | Retail | 71.8 | -3.00% | 1.3 | 4,283 | 16.6 | 215 | 333.4 | 27,700 | 28.5% | Link |
| MWG | Retail | 63.5 | -0.90% | 1.3 | 3,661 | 42.5 | 717 | 88.5 | 63,800 | 46.8% | Link |
| PNJ | Retail | 95.9 | -1.20% | 0.9 | 1,265 | 5.4 | 5,860 | 16.4 | 83,500 | 49.0% | Link |
| DGW | Retail | 64.0 | 0.00% | 1.7 | 422 | 9.1 | 2,200 | 29.1 | 90,900 | 24.4% | Link |
| FPT | Technology | 131.9 | -1.60% | 1.0 | 7,596 | 36.3 | 5,335 | 24.7 | 57,000 | 45.2% | Link |
| CTR | Technology | 138.4 | -2.50% | 1.3 | 624 | 5.0 | 4,582 | 30.2 | 108,000 | 10.4% | 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 ownersh- p | ROE (%) |
|--------|--------------|-------------------------|--------|------|-----------------|------------------------|-----------------|--------|------|--------------------------|---------|
| HDB | Bank | 25.2 | 1.80% | 0.9 | 2,894 | 16.2 | 3,809 | 6.6 | 1.6 | 18.2% | 25.4% |
| VIB | Bank | 21.6 | 1.40% | 1.1 | 2,161 | 7.4 | 3,315 | 6.5 | 1.4 | 20.5% | 24.3% |
| TPB | Bank | 17.8 | 0.00% | 1.2 | 1,550 | 7.7 | 2,050 | 8.7 | 1.1 | 28.4% | 13.7% |
| MSB | Bank | 14.8 | 1.40% | 1.2 | 1,167 | 9.1 | 2,310 | 6.4 | 0.9 | 29.4% | 16.0% |
| EIB | Bank | 18.6 | -1.10% | 1.0 | 1,273 | 4.4 | 1,147 | 16.2 | 1.4 | 2.9% | 10.1% |
| HCM | Securities | 25.9 | -2.30% | 1.6 | 719 | 7.1 | 1,175 | 22.0 | 2.1 | 45.1% | 8.3% |
| VCI | Securities | 46.9 | -2.10% | 1.7 | 817 | 7.9 | 1,409 | 33.3 | 2.5 | 19.2% | 7.1% |
| VND | Securities | 15.4 | -3.40% | 1.5 | 924 | 8.5 | 2,057 | 7.5 | 1.1 | 12.6% | 13.1% |
| BID | Bank | 48.0 | 1.80% | 1.1 | 10,790 | 14.9 | 3,841 | 12.5 | 2.3 | 17.2% | 20.3% |
| SHS | Securities | 17.1 | -1.70% | 1.7 | 548 | 7.9 | 1,076 | 15.9 | 1.3 | 9.0% | 5.7% |
| LCG | Construction | 11.2 | -2.60% | 1.6 | 85 | 0.9 | 655 | 17.1 | 0.8 | 2.3% | 4.6% |
| HUT | Construction | 17.0 | -2.90% | 1.3 | 598 | 1.5 | 73 | 232.7 | 1.5 | 1.5% | 0.7% |
| CTD | Construction | 71.6 | -3.00% | 1.1 | 282 | 3.8 | 2,709 | 26.4 | 0.8 | 47.1% | 2.3% |
| HHV | Construction | 12.3 | -1.20% | 1.5 | 200 | 1.5 | 833 | 14.8 | 0.6 | 8.2% | 4.2% |
| C4G | Construction | 9.7 | -1.00% | 1.3 | - | 0.3 | 433 | 22.4 | 0.9 | 0.0% | 4.9% |
| DIG | IP | 24.5 | -6.80% | 1.7 | 589 | 34.3 | (38) | -638.2 | 2.0 | 4.2% | 2.1% |
| CEO | IP | 16.9 | -1.20% | 1.3 | 343 | 6.3 | 312 | 54.2 | 1.5 | 4.8% | 2.4% |
| KBC | IP | 27.0 | -4.60% | 1.5 | 817 | 6.4 | 1,262 | 21.4 | 1.1 | 20.4% | 11.7% |
| VGC | IP | 51.1 | -2.30% | 1.2 | 903 | 0.7 | 2,746 | 18.6 | 2.8 | 5.1% | 12.5% |
| SZC | IP | 38.6 | -2.80% | 1.2 | 274 | 2.0 | 1,515 | 25.5 | 2.3 | 3.1% | 13.4% |
| SIP | IP | 82.9 | -4.60% | 1.4 | 684 | 1.6 | 5,701 | 14.5 | 3.9 | 1.6% | 26.9% |
| PHR | IP | 58.4 | -5.50% | 1.0 | 312 | 1.1 | 3,448 | 16.9 | 2.1 | 18.4% | 18.3% |
| GVR | IP | 35.6 | -6.90% | 1.5 | 5,607 | 15.0 | 628 | 56.6 | 2.8 | 0.5% | 6.2% |
| NKG | Material | 24.8 | -2.40% | 1.6 | 258 | 7.1 | 1,222 | 20.3 | 1.2 | 15.4% | 2.3% |
| BMP | Chemicals | 98.6 | 2.30% | 1.0 | 318 | 2.6 | 11,420 | 8.6 | 3.0 | 83.3% | 39.1% |
| IJC | Real estate | 14.6 | -6.70% | 1.5 | 218 | 4.7 | 865 | 16.9 | 1.2 | 4.6% | 10.3% |
| DXG | Real estate | 13.5 | -3.20% | 1.6 | 384 | 6.1 | 420 | 32.1 | 0.9 | 17.8% | 1.1% |
| VRE | Real estate | 19.8 | -2.20% | 1.2 | 1,770 | 13.6 | 1,966 | 10.0 | 1.2 | 22.9% | 12.4% |
| PDR | Real estate | 21.0 | -6.50% | 1.6 | 721 | 11.3 | 964 | 21.7 | 1.6 | 8.0% | 7.2% |
| DIG | Real estate | 24.5 | -6.80% | 1.7 | 589 | 34.3 | (38) | -638.2 | 2.0 | 4.2% | 2.1% |
| DHC | Chemicals | 39.7 | -0.90% | 1.1 | 126 | 0.8 | 3,461 | 11.5 | 1.7 | 39.8% | 17.2% |
| PLX | O&G | 45.0 | -4.50% | 1.0 | 2,255 | 6.8 | 2,570 | 17.5 | 2.1 | 17.8% | 10.7% |
| PLC | O&G | 25.9 | -1.90% | 1.5 | 82 | 0.4 | 1,112 | 23.3 | 1.6 | 0.3% | 8.4% |
| BSR | O&G | 22.6 | -4.20% | 1.2 | - | 15.3 | 2,588 | 8.7 | 1.2 | 0.7% | 15.6% |
| DRC | Tyre | 33.8 | -6.50% | 0.8 | 159 | 2.6 | 2,286 | 14.8 | 2.1 | 11.9% | 13.2% |
| PC1 | Utilities | 30.2 | -3.50% | 1.3 | 370 | 9.8 | 651 | 46.4 | 1.8 | 12.1% | 4.1% |
| HDG | Utilities | 30.2 | -4.70% | 1.3 | 400 | 13.5 | 2,061 | 14.7 | 1.5 | 15.6% | 12.9% |
| GEX | Utilities | 22.1 | -3.90% | 1.7 | 742 | 11.5 | 625 | 35.4 | 1.5 | 8.8% | 4.1% |
| QTP | Utilities | 15.6 | -4.90% | 0.5 | - | 1.7 | 1,549 | 10.1 | 1.3 | 1.3% | 10.8% |
| REE | Utilities | 72.2 | -2.30% | 1.0 | 1,338 | 6.0 | 4,706 | 15.3 | 1.7 | 49.0% | 13.9% |
| ANV | Fishery | 34.6 | -0.70% | 1.4 | 181 | 5.2 | (252) | -136.8 | 1.6 | 1.1% | 1.5% |
| PTB | Fishery | 72.2 | -0.70% | 0.7 | 191 | 0.6 | 4,765 | 15.2 | 1.8 | 25.0% | 10.6% |
| PVT | Logistics | 28.9 | -4.60% | 1.0 | 406 | 6.2 | 3,150 | 9.2 | 1.3 | 14.0% | 14.3% |
| VSC | Logistics | 20.3 | -5.60% | 1.4 | 214 | 7.9 | 532 | 38.1 | 1.9 | 2.5% | 6.2% |
| HAH | Logistics | 42.5 | -4.20% | 1.2 | 203 | 12.4 | 3,081 | 13.8 | 1.7 | 9.0% | 12.1% |
| VTP | Logistics | 80.0 | -3.70% | 1.5 | 384 | 6.4 | 2,980 | 26.8 | 6.0 | 6.9% | 25.6% |
| DBC | Retail | 28.6 | -4.70% | 1.7 | 364 | 6.0 | 1,729 | 16.5 | 1.5 | 11.9% | 0.5% |
| FRT | Retail | 173.8 | -1.00% | 0.7 | 934 | 2.7 | (2,215) | -78.5 | 14.1 | 36.0% | 11.8% |
| QNS | Retail | 49.1 | -1.20% | 0.6 | - | 1.6 | 6,737 | 7.3 | 2.0 | 15.0% | 27.3% |
| PVT | O&G | 28.9 | -4.60% | 1.0 | 406 | 6.2 | 3,150 | 9.2 | 1.3 | 14.0% | 14.3% |
| TNG | Textile | 24.6 | -3.50% | 1.2 | 119 | 3.6 | 1,981 | 12.4 | 1.6 | 19.1% | 12.5% |

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

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