

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

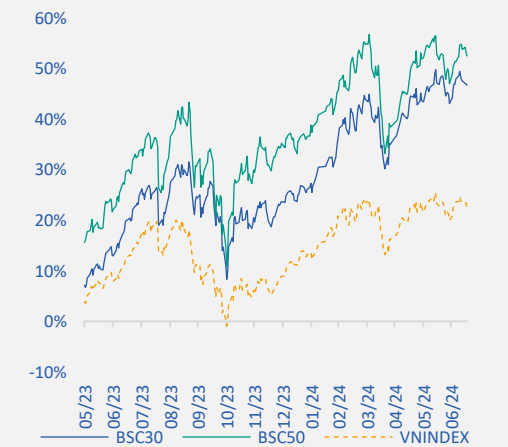
		%D	%W
SPX	5,667	0.64%	1.62%
FTSE100	8,148	-0.20%	-0.55%
Eurostoxx	4,911	-0.81%	-0.80%
Shanghai	2,963	-0.45%	0.80%
Nikkei	41,153	-0.31%	-1.19%

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%
Interst 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

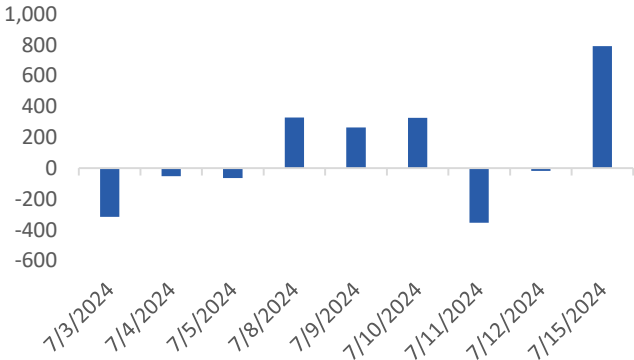
Top 5 gainers on the HSX

	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

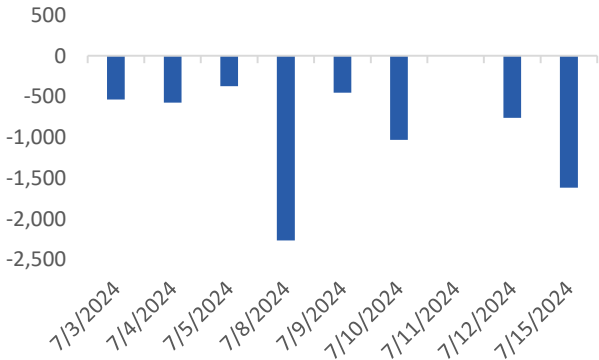
Top 5 losers on the HSX

	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 ownershi- p	Link
VCB	Bank	88.0	0.10%	0.6	19,394	11.7	5,838	15.1	105,000	23.2%	<a href="#">Link</a>
BID	Bank	48.0	1.80%	1.1	10,790	14.9	3,841	12.5	54,578	17.2%	<a href="#">Link</a>
VPB	Bank	19.0	0.00%	1.0	5,944	26.2	1,397	13.6	23,685	26.7%	<a href="#">Link</a>
TCB	Bank	23.7	4.40%	1.1	6,584	25.6	5,600	4.2	-	21.8%	<a href="#">Link</a>
MBB	Bank	24.5	4.00%	1.0	5,126	69.9	3,818	6.4	24,400	23.2%	<a href="#">Link</a>
STB	Bank	30.4	1.70%	1.1	2,260	30.0	4,206	7.2	31,200	23.2%	<a href="#">Link</a>
CTG	Bank	33.0	1.50%	1.3	6,988	29.4	3,751	8.8	19,100	26.1%	<a href="#">Link</a>
ACB	Bank	24.5	1.70%	0.8	4,315	27.9	4,072	6.0	42,500	30.0%	<a href="#">Link</a>
SSI	Securities	34.2	-0.70%	1.2	2,032	19.3	1,704	20.0	45,900	42.6%	<a href="#">Link</a>
IDC	IP	58.5	-2.70%	1.2	761	4.6	5,880	9.9	-	24.1%	<a href="#">Link</a>
HPG	Material	28.2	-0.90%	1.2	7,112	28.4	1,601	17.6	23,300	24.4%	<a href="#">Link</a>
HSG	Material	23.7	-2.50%	1.7	576	21.5	1,423	16.7	79,900	20.4%	<a href="#">Link</a>
VHM	Real estate	37.3	-1.60%	1.0	6,404	10.3	5,074	7.4	38,900	15.7%	<a href="#">Link</a>
KDH	Real estate	36.9	-2.40%	1.4	1,163	9.6	726	50.9	44,100	39.6%	<a href="#">Link</a>
NLG	Real estate	42.0	-4.50%	1.3	637	6.8	1,040	40.4	46,100	49.4%	<a href="#">Link</a>
DGC	Chemicals	123.8	-1.30%	1.4	1,854	18.5	7,845	15.8	85,000	18.9%	<a href="#">Link</a>
DCM	Fertilizer	37.0	-5.40%	1.3	772	16.0	2,313	16.0	41,000	8.5%	<a href="#">Link</a>
GAS	O&G	78.0	-0.40%	0.6	7,064	4.8	4,688	16.6	36,000	1.9%	<a href="#">Link</a>
PVS	O&G	41.5	-3.50%	1.1	782	6.4	1,992	20.8	110,500	21.6%	<a href="#">Link</a>
PVD	O&G	28.5	-4.00%	1.3	625	5.8	1,200	23.7	45,000	16.2%	<a href="#">Link</a>
POW	Utilities	13.9	-6.70%	0.7	1,284	17.5	350	39.8	38,500	4.0%	<a href="#">Link</a>
VHC	Fishery	72.3	-2.30%	1.1	640	2.7	3,774	19.2	29,000	29.6%	<a href="#">Link</a>
GMD	Logistics	81.0	-0.40%	0.8	992	6.5	8,430	9.6	14,500	48.1%	<a href="#">Link</a>
VNM	Retail	65.7	-0.60%	0.6	5,414	9.0	4,408	14.9	81,700	50.1%	<a href="#">Link</a>
MSN	Retail	71.8	-3.00%	1.3	4,283	16.6	215	333.4	27,700	28.5%	<a href="#">Link</a>
MWG	Retail	63.5	-0.90%	1.3	3,661	42.5	717	88.5	63,800	46.8%	<a href="#">Link</a>
PNJ	Retail	95.9	-1.20%	0.9	1,265	5.4	5,860	16.4	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	64.0	0.00%	1.7	422	9.1	2,200	29.1	90,900	24.4%	<a href="#">Link</a>
FPT	Technology	131.9	-1.60%	1.0	7,596	36.3	5,335	24.7	57,000	45.2%	<a href="#">Link</a>
CTR	Technology	138.4	-2.50%	1.3	624	5.0	4,582	30.2	108,000	10.4%	<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 ownership	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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BSC Research

Trần Thăng Long

Head of BSC Research

[longtt@bsc.com.vn](mailto:longtt@bsc.com.vn)

Macro & Market team

Bùi Nguyên Khoa

Leader of Macro - Market team

[khoabn@bsc.com.vn](mailto:khoabn@bsc.com.vn)

Vũ Việt Anh

Macro - Market analyst

[anhvv@bsc.com.vn](mailto:anhvv@bsc.com.vn)

Trần Thanh Tùng

Macro - Market analyst

[tungtt@bsc.com.vn](mailto:tungtt@bsc.com.vn)

Phạm Thanh Thảo

Macro - Market analyst

[thaopt1@bsc.com.vn](mailto:thaopt1@bsc.com.vn)

Nguyễn Giang Anh

Macro - Market analyst

[anhng@bsc.com.vn](mailto:anhng@bsc.com.vn)

Contact Info

Website  
<http://www.bsc.com.vn>

Ho Chi Minh City Office  
4th, 9th Floor, President Place Tower, 93 Nguyen Cong Tru Street, I District, Ho Chi Minh City, Vietnam.  
Tel: (028) 3821 8885  
Fax: (028) 3821 8879

BSC Headquarters  
8th, 9th floor, ThaiHoldings Tower, 210 Tran Quang Khai street, Hanoi, Vietnam  
Tel: (024) 3935 2722  
Fax: (024) 2220 0669

For BSC Research  
BSC Research Department  
hn.ptnc@bsc.com.vn  
(+84) 39352722 - Ext 108

For Institutional Clients  
Investment Consulting and Brokerage  
hn.tvdt.khtc@bsc.com.vn  
(024) 39264 659

For Individual Clients  
i-Center  
i-center@bsc.com.vn  
(024) 39264 660