

STOCK MARKET

The VN-Index failed to conquer the 1,280 – 1,285 range in the morning session today. The index then dropped to around 1,275 before continuing to decline and closing at 1,268.21 points, down more than 7 points compared to yesterday. Market breadth leaned towards the negative side with 16 out of 18 sectors declining, led by the Oil and Gas sector, followed by the Chemicals sector. On the other hand, the Real Estate sector had a positive trading session today. In terms of foreign transactions, there was net selling on the HSX exchange and net buying on the HNX exchange by foreign investors today. The VN-Index is showing a tendency to find a balance point after the recent correction, and investors should trade cautiously in the

FUTURES CONTRACTS

Futures contracts decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 05/09/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **-7.59** points, closing at **1268.21** points. HNX-Index **-1.18** points, closing at **234.96** points.
- Pulling the index up: **VHM (+1.37)**, **VIC (+1.01)**, **VNM (+0.21)**, **HNG (+0.09)**, **VCF (+0.05)**.
- Pulling the index down: **VCB (-1.22)**, **FPT (-0.84)**, **GVR (-0.77)**, **MBB (-0.57)**, **MWG (-0.42)**.
- The matched trade value of VN-Index reached VND 14,776 billion, increased **7.59%** compared to the previous session. The total transaction value reached VND 16,541 billion.
- The trading range is 16.16 points. The market had **118** gainers, 75 remaining unchanged, **285** losers.
- Foreign investors' net selling value: **VND -686.93 billion** on HOSE, including **FPT (VND -272.49 billion)**, **HPG (VND -92.46 billion)**, **VPB (VND -88.80 billion)**, **VCI (VND -74.36 billion)**, **HSG (VND -74.11 billion)**. Foreign investors were net buyers on HNX with the value of **VND 15.20 billion**.

BSC30, BSC50 PERFORMANCE

- BSC30 **-1.13%**. Positive stocks: **VHM (+3.65%)**, **DGW (+0.98%)**, **VNM (+0.81%)**.
- BSC50 **-0.77%**. Positive stocks: **VRE (+1.02%)**, **DBC (+0.90%)**, **BSR (+0.86%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-1.13%	-0.77%	-1.22%	-1.69%
1 week	0.35%	0.00%	0.19%	0.37%
1 months	-0.19%	-1.20%	-0.10%	0.61%
3 months	-0.47%	-2.19%	0.22%	0.16%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,268.21	234.96	93.47
% 1D	-0.59%	-0.50%	-0.30%
TV (bil VND)	14,776	869	593
%1D	7.59%	-9.59%	-0.88%
Foreign (bil VND)	-686.93	15.20	0.30

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VHM	196.79	FPT	-272.49
VNM	94.52	HPG	-92.46
FUEVFVND	62.71	VPB	-88.80
NVL	30.46	VCI	-74.36
MWG	22.13	HSG	-74.11

Overview of global stock markets

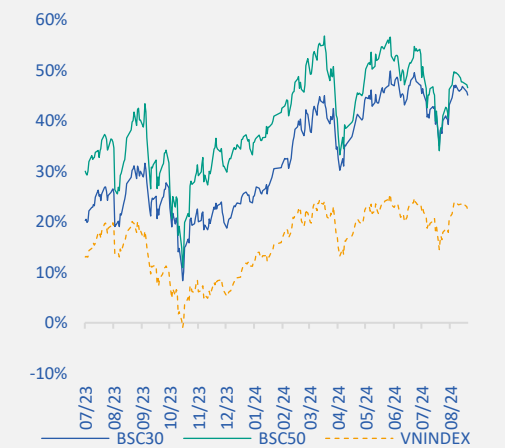
		%D	%W
SPX	5,520	-0.16%	-1.88%
FTSE100	8,269	-0.01%	-1.33%
Eurostoxx	4,827	-0.69%	-2.61%
Shanghai	2,788	0.14%	-1.23%
Nikkei	36,649	-1.07%	-4.45%

Source: Bloomberg

	Close	%
Commodities		
Brent	73	0.36%
Gold	2,495	
Exchange rate		
USD/VND	24,930	-0.34%
EUR/VND	28,184	-0.11%
JPY/VND	176	0.57%
Interest rates		
10Y-Gov bond rate	2.76%	0.01%
1M-interbank rate	4.51%	

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	43.75	2.94%	1.37	4.35
VIC	45.05	2.39%	1.01	3.82
VNM	74.70	0.54%	0.21	2.09
HNG	4.68	6.85%	0.09	1.11
VCF	275.20	2.57%	0.05	0.03

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PGS	34.00	6.25%	0.08	0.05
NVB	9.20	1.10%	0.04	0.56
BCF	38.90	4.01%	0.04	0.03
C69	8.00	9.59%	0.03	0.06
BTW	52.30	9.19%	0.03	0.01

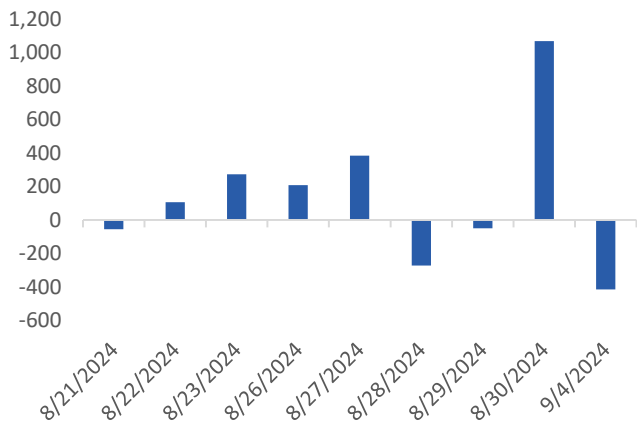
Top 5 gainers on the HSX

	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
Proprietary trading



Source: FiinProX, BSC Research

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VCB	90.10	-0.99%	-1.22	5.59
FPT	130.60	-1.80%	-0.84	1.46
GVR	33.90	-2.31%	-0.77	4.00
MBB	23.95	-1.84%	-0.57	5.31
MWG	67.90	-1.74%	-0.42	1.46

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
IDC	59.00	-1.99%	-0.28	0.33
NTP	66.40	-2.21%	-0.14	0.13
PVS	40.00	-0.99%	-0.14	0.48
VCS	65.10	-1.81%	-0.14	0.16
CEO	16.30	-1.81%	-0.11	0.54

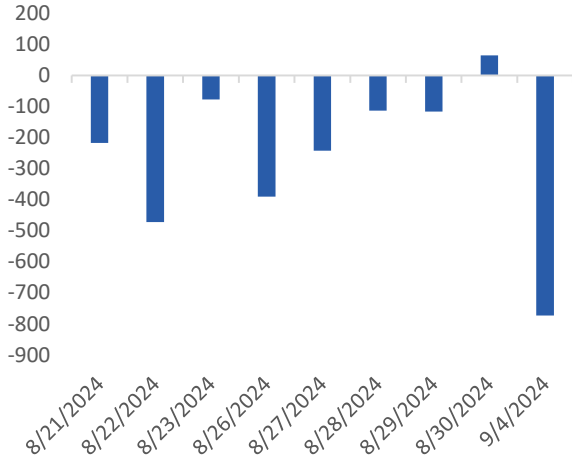
Top 5 losers on the HSX

	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
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	90.1	-1.00%	0.6	20,256	4.3	5,962	15.1	105,000	23.4%	Link
BID	Bank	48.7	-0.50%	1.1	11,167	3.7	4,006	12.2	54,578	17.2%	Link
VPB	Bank	18.3	-1.10%	1.0	5,840	11.7	1,460	12.5	23,685	26.0%	Link
TCB	Bank	22.8	-0.90%	1.2	6,461	10.4	3,047	7.5	-	20.8%	Link
MBB	Bank	24.0	-1.80%	1.0	5,112	15.9	4,018	6.0	24,400	23.2%	Link
STB	Bank	29.6	-1.70%	1.1	2,245	12.5	4,340	6.8	31,200	23.2%	Link
CTG	Bank	35.0	-0.80%	1.3	7,560	12.0	3,782	9.3	19,100	296.5%	Link
ACB	Bank	24.5	-0.60%	0.7	4,402	3.5	3,676	6.7	42,500	30.0%	Link
SSI	Broker	33.1	-0.20%	1.3	2,009	13.1	1,882	17.6	45,900	41.4%	Link
IDC	IP	59.0	-3.10%	1.1	783	3.7	5,573	10.6	-	24.2%	Link
HPG	Material	25.0	-0.80%	1.2	6,445	22.7	1,746	14.3	23,300	23.3%	Link
HSG	Material	19.9	-2.00%	1.6	493	11.2	1,844	10.8	79,900	14.9%	Link
VHM	RE	43.8	2.90%	1.0	7,663	39.0	5,326	8.2	38,900	14.0%	Link
KDH	RE	38.0	-0.10%	1.2	1,388	4.0	765	49.6	44,100	38.1%	Link
NLG	RE	41.1	-2.10%	1.3	636	2.6	1,102	37.3	46,100	48.9%	Link
DGC	Chemicals	113.7	-1.30%	1.4	1,737	9.2	7,898	14.4	85,000	18.3%	Link
DCM	Fertilizer	36.5	-1.50%	1.3	777	4.4	2,828	12.9	41,000	7.4%	Link
GAS	O&G	83.3	-0.70%	0.6	7,696	3.0	4,760	17.5	36,000	1.9%	Link
PVS	O&G	40.0	-0.50%	1.0	769	2.7	1,932	20.7	110,500	21.9%	Link
PVD	O&G	26.2	-1.70%	1.3	587	3.1	1,150	22.8	45,000	14.9%	Link
POW	Utilities	13.0	-1.10%	0.7	1,229	4.1	467	27.9	38,500	4.1%	Link
VHC	Fishery	71.5	-2.10%	1.2	646	1.7	3,216	22.2	29,000	30.1%	Link
GMD	Logistics	78.8	-0.30%	0.7	984	6.1	3,966	19.9	14,500	48.6%	Link
VNM	Retail	74.7	0.50%	0.6	6,280	17.6	4,633	16.1	81,700	51.6%	Link
MSN	Retail	74.1	-1.60%	1.2	4,510	15.0	466	158.9	27,700	26.1%	Link
MWG	Retail	67.9	-1.70%	1.3	3,993	23.2	1,507	45.0	63,800	47.1%	Link
PNJ	Retail	100.1	-1.10%	1.0	1,347	4.4	6,133	16.3	83,500	49.0%	Link
DGW	Retail	61.6	0.50%	1.7	414	5.1	2,237	27.5	90,900	25.2%	Link
FPT	Tech	130.6	-1.80%	1.1	7,672	42.3	4,890	26.7	57,000	45.6%	Link
CTR	Tech	125.0	-1.70%	1.4	575	1.2	4,590	27.2	108,000	9.2%	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	27.0	-0.60%	0.9	3,157	6.3	4,137	6.5	1.6	19.2%	27.8%
VIB	Bank	18.2	-0.30%	1.1	2,167	2.8	3,048	6.0	1.2	4.3%	21.4%
TPB	Bank	17.6	-0.30%	1.3	1,559	3.4	2,154	8.2	1.1	28.5%	14.2%
MSB	Bank	11.4	0.00%	1.1	1,187	1.8	2,366	4.8	0.7	22.7%	14.9%
EIB	Bank	18.6	0.00%	0.8	1,302	4.0	1,273	14.6	1.4	2.8%	9.9%
HCM	Broker	29.2	0.00%	1.7	826	16.8	1,397	20.9	1.9	45.7%	10.6%
VCI	Broker	45.0	-2.00%	1.7	800	13.5	1,763	25.5	2.2	20.7%	9.6%
VND	Broker	15.2	0.00%	1.5	934	5.1	1,591	9.6	1.3	13.3%	15.0%
BSI	Broker	48.8	-0.90%	1.7	438	1.8	2,165	22.5	2.0	40.0%	9.3%
SHS	Broker	16.0	-2.40%	1.7	523	3.5	1,338	12.0	1.2	8.9%	10.5%
CTD	Const	63.1	-0.90%	1.3	254	0.6	2,996	21.1	0.7	46.7%	3.6%
HHV	Const	12.2	-2.40%	1.5	211	2.5	860	14.1	0.6	7.9%	4.4%
LCG	Const	11.0	-1.40%	1.5	85	0.6	771	14.2	0.8	2.2%	5.7%
SZC	IP	36.8	-0.40%	1.1	266	1.1	1,549	23.8	2.2	3.1%	12.1%
SIP	IP	74.2	-2.60%	1.5	624	0.7	5,925	12.5	3.5	2.3%	29.0%
PHR	IP	57.0	-2.90%	1.0	311	0.6	3,028	18.8	2.0	18.5%	12.1%
DIG	RE	22.8	-2.10%	1.8	560	11.2	152	150.6	1.8	4.1%	1.1%
CEO	RE	16.3	-1.20%	2.0	354	3.1	313	52.0	1.4	4.7%	2.1%
KBC	IP	26.0	-1.10%	1.5	804	2.9	300	86.9	1.1	20.6%	1.7%
VGC	IP	42.5	-1.50%	1.2	766	1.9	1,776	23.9	2.3	4.4%	8.2%
GVR	IP	33.9	-2.30%	1.5	5,454	3.1	704	48.1	2.7	0.5%	6.5%
NKG	Material	20.7	-3.00%	1.7	219	5.4	1,580	13.1	0.9	12.6%	7.4%
BMP	Material	102.0	-1.70%	1.2	336	0.4	11,420	8.9	3.1	82.9%	34.6%
IJC	RE	13.8	-1.10%	1.4	210	1.0	683	20.3	1.1	4.5%	6.0%
DXG	RE	15.6	-1.90%	1.6	452	14.7	249	62.7	1.1	15.7%	1.9%
VRE	RE	19.7	0.00%	1.3	1,801	9.9	1,975	10.0	1.1	22.2%	11.9%
PDR	RE	21.8	-2.50%	1.8	767	10.4	557	39.2	1.7	6.8%	5.0%
DIG	RE	22.8	-2.10%	1.8	560	11.2	152	150.6	1.8	4.1%	1.1%
HUT	Const	16.9	-1.70%	1.2	607	0.7	64	263.6	1.8	0.0%	1.7%
C4G	Const	9.0	-1.10%	1.3	-	0.3	507	17.8	0.8	0.0%	4.8%
CSV	Chemicals	39.1	0.80%	1.8	174	3.1	4,748	8.2	1.2	2.5%	15.2%
DHC	Chemicals	37.0	-1.20%	1.2	120	0.3	3,067	12.1	1.6	39.3%	13.3%
DRC	Tyre	33.0	-1.50%	0.8	158	0.8	2,509	13.2	2.1	11.6%	16.5%
PC1	Utlilities	28.0	-1.40%	1.3	351	1.1	892	31.5	1.6	13.8%	6.1%
HDG	Utlilities	27.9	-1.20%	1.3	378	3.3	1,989	14.0	1.5	15.6%	11.8%
GEX	Utlilities	21.2	-0.20%	1.6	724	4.0	1,245	17.0	1.4	8.3%	7.0%
QTP	Utlilities	14.7	0.00%	0.6	-	0.2	1,357	10.8	1.2	1.2%	11.2%
PLX	O&G	46.0	-2.00%	0.9	2,354	5.5	2,874	16.0	2.3	18.2%	13.8%
BSR	O&G	23.1	-0.90%	1.0	-	7.0	2,408	9.6	1.2	0.0%	13.4%
PLC	O&G	26.4	1.90%	1.5	86	0.1	728	36.3	1.7	0.5%	4.7%
ANV	Fishery	31.2	-0.60%	1.4	167	0.8	262	118.9	1.4	1.0%	1.2%
PTB	Material	64.0	-0.90%	0.7	172	0.2	4,903	13.1	1.5	24.9%	11.9%
VSC	Logistics	18.4	0.30%	1.4	198	1.8	713	25.9	1.1	3.0%	7.3%
HAH	Logistics	40.6	-1.20%	1.2	198	2.9	2,800	14.5	1.8	7.8%	10.6%
VTP	Logistics	74.4	-0.80%	1.5	364	1.7	2,943	25.3	5.7	6.9%	22.8%
DBC	Retail	28.2	0.90%	1.6	365	3.9	979	28.7	1.4	9.0%	5.0%
FRT	Retail	182.5	0.00%	0.6	1,000	3.1	(414)	-440.4	14.9	36.4%	11.8%
QNS	Retail	47.3	-0.40%	0.6	-	0.2	6,678	7.1	1.9	12.2%	28.7%
TNG	Textile	25.9	-7.50%	1.2	128	3.8	2,254	11.5	1.6	15.8%	14.7%
PVT	Logistics	28.0	-0.70%	0.9	402	1.5	2,802	10.0	1.4	13.1%	14.2%
DPM	Fertilizer	34.8	-1.00%	1.3	547	2.5	1,703	20.4	1.2	9.0%	5.5%
REE	Utlilities	65.3	-2.50%	1.1	1,237	2.9	3,804	17.2	1.7	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.

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