

STOCK MARKET

The VN-Index today continued to decline to the 1,260 – 1,265 range before rising again and closing at 1,273.96 points, up nearly 6 points from yesterday. The number of stocks that declined was fairly balanced with those that increased, but 15 out of 18 sectors saw gains, indicating a divergence in capital flow. The oil and gas sector led the increase today, followed by the chemicals sector, basic materials, and others. Regarding foreign trading activity, foreign investors were net buyers on both the HSX and HNX exchanges today. The VN-Index is still in the process of finding a balance within the 1,260 – 1,280 range.

FUTURES CONTRACTS

Futures contracts increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 06/09/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **+5.75** points, closing at **1273.96** points. HNX-Index **-0.31** points, closing at **234.65** points.
- Pulling the index up: **BID (+0.84)**, **MSN (+0.68)**, **CTG (+0.66)**, **GVR (+0.59)**, **HPG (+0.55)**.
- Pulling the index down: **VIC (-0.37)**, **SSB (-0.33)**, **HDB (-0.14)**, **HVN (-0.11)**, **SAB (-0.09)**.
- The matched trade value of VN-Index reached **VND 12,185 billion**, decreased **-17.60%** compared to the previous session. The total transaction value reached VND 15,450 billion.
- The trading range is 11.5 points. The market had **192** gainers, 64 remaining unchanged, **212** losers.
- Foreign investors' net buying value: **VND 231.37 billion** on HOSE, including **FPT (VND 199.62 billion)**, **CTG (VND 103.05 billion)**, **VNM (VND 82.64 billion)**, **MSN (VND 61.98 billion)**, **STB (VND 57.88 billion)**. Foreign investors were net buyers on HNX with the value of **VND 39.95 billion**.

BSC30, BSC50 PERFORMANCE

- BSC30 **-1.22%**. Positive stocks: **MSN (+2.56%)**, **DCM (+2.33%)**, **CTG (+1.43%)**.
- BSC50 **-1.29%**. Positive stocks: **DPM (+3.45%)**, **HDG (+3.05%)**, **VRE (+2.03%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-1.22%	-1.29%	-0.77%	-1.21%
1 week	0.00%	0.00%	0.00%	0.00%
1 months	-0.21%	-1.27%	-0.11%	0.78%
3 months	0.10%	-1.48%	0.83%	0.87%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,273.96	234.65	93.37
% 1D	0.45%	-0.13%	-0.11%
TV (bil VND)	12,185	827	508
%1D	-17.60%	-4.82%	-14.40%
Foreign (bil VND)	231.37	39.95	-17.91

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FPT	199.62	VHM	-371.08
CTG	103.05	HDB	-48.16
VNM	82.64	VPB	-37.43
MSN	61.98	VHC	-24.91
STB	57.88	PDR	-20.40

Overview of global stock markets

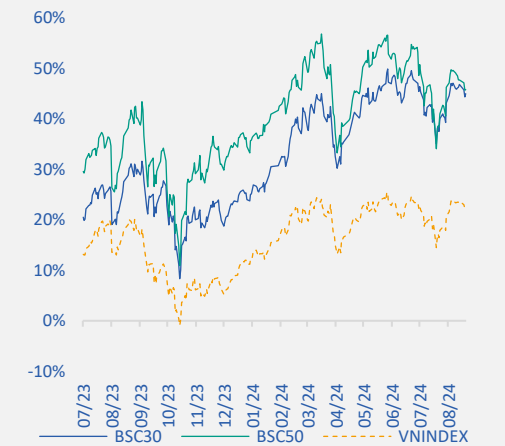
		%D	%W
SPX	5,503	-0.30%	-1.59%
FTSE100	8,216	-0.31%	-1.91%
Eurostoxx	4,801	-0.72%	-3.24%
Shanghai	2,767	-0.78%	-2.66%
Nikkei	36,423	-0.62%	-5.69%

Source: Bloomberg

	Close	%
Commodities		
Brent	73	-0.14%
Gold	2,517	
Exchange rate		
USD/VND	24,820	-0.40%
EUR/VND	28,163	-0.23%
JPY/VND	177	0.57%
Interest rates		
10Y-Gov bond rate	2.75%	-0.01%
1M-interbank rate	4.43%	

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)
BID	49.30	1.23%	0.84	5.70
MSN	76.00	2.56%	0.68	1.44
CTG	35.50	1.43%	0.66	5.37
GVR	34.50	1.77%	0.59	4.00
HPG	25.40	1.40%	0.55	6.40

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
NTP	68.50	3.16%	0.20	0.13
PVS	40.50	1.25%	0.17	0.48
DNP	24.00	5.73%	0.14	0.14
NET	97.00	5.43%	0.08	0.02
VIF	17.80	1.71%	0.08	0.35

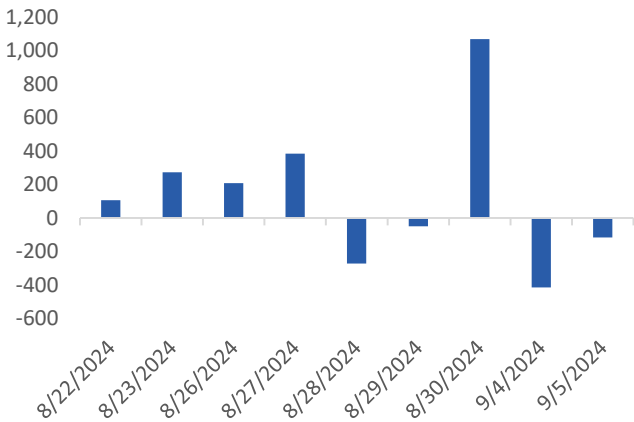
Top 5 gainers on the HSX

	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)
VIC	44.65	-0.89%	-0.37	3.82
SSB	18.00	-2.70%	-0.33	2.84
HDB	26.75	-0.74%	-0.14	2.91
HVN	21.30	-0.93%	-0.11	2.21
SAB	56.70	-0.53%	-0.09	1.28

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
KSV	59.90	-2.92%	-0.25	0.20
SHS	15.60	-2.50%	-0.23	0.81
MBS	27.10	-1.45%	-0.12	0.44
NVB	9.00	-2.17%	-0.08	0.56
CEO	16.10	-1.23%	-0.08	0.54

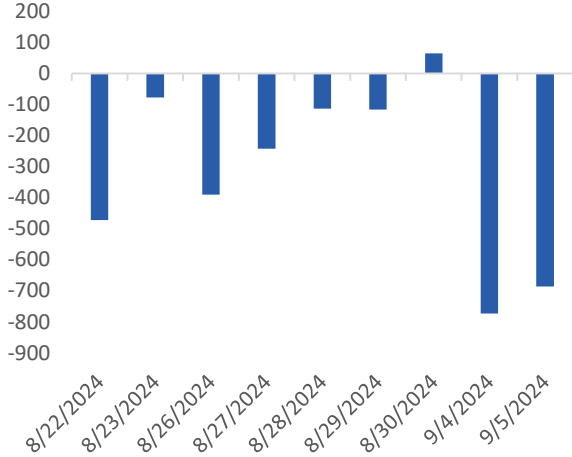
Top 5 losers on the HSX

	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	90.2	0.10%	0.6	20,286	2.8	5,962	15.1	105,000	23.4%	<a href="#">Link</a>
BID	Bank	49.3	1.20%	1.1	11,308	4.7	4,006	12.3	54,578	17.2%	<a href="#">Link</a>
VPB	Bank	18.4	0.80%	1.0	5,890	11.1	1,460	12.6	23,685	26.0%	<a href="#">Link</a>
TCB	Bank	22.8	0.00%	1.2	6,463	11.2	3,047	7.5	-	20.8%	<a href="#">Link</a>
MBB	Bank	24.0	0.20%	1.0	5,124	14.2	4,018	6.0	24,400	23.2%	<a href="#">Link</a>
STB	Bank	29.9	1.00%	1.1	2,268	10.3	4,340	6.9	31,200	23.2%	<a href="#">Link</a>
CTG	Bank	35.5	1.40%	1.3	7,671	13.1	3,782	9.4	19,100	296.5%	<a href="#">Link</a>
ACB	Bank	24.6	0.40%	0.7	4,421	5.0	3,676	6.7	42,500	30.0%	<a href="#">Link</a>
SSI	Broker	33.4	0.90%	1.3	2,028	12.8	1,882	17.8	45,900	41.4%	<a href="#">Link</a>
IDC	IP	58.7	-3.60%	1.1	780	2.2	5,573	10.5	-	24.2%	<a href="#">Link</a>
HPG	Material	25.4	1.40%	1.2	6,537	23.4	1,746	14.5	23,300	23.3%	<a href="#">Link</a>
HSG	Material	20.0	0.30%	1.6	494	5.9	1,844	10.8	79,900	14.9%	<a href="#">Link</a>
VHM	RE	43.9	0.30%	1.0	7,692	18.1	5,326	8.2	38,900	14.0%	<a href="#">Link</a>
KDH	RE	37.8	-0.40%	1.2	1,383	2.7	765	49.4	44,100	38.1%	<a href="#">Link</a>
NLG	RE	41.1	0.00%	1.3	636	1.1	1,102	37.3	46,100	48.9%	<a href="#">Link</a>
DGC	Chemicals	114.0	0.30%	1.4	1,742	8.4	7,898	14.4	85,000	18.3%	<a href="#">Link</a>
DCM	Fertilizer	37.4	2.30%	1.3	796	5.7	2,828	13.2	41,000	7.4%	<a href="#">Link</a>
GAS	O&G	84.1	1.00%	0.6	7,772	3.0	4,760	17.7	36,000	1.9%	<a href="#">Link</a>
PVS	O&G	40.5	0.70%	1.0	779	3.8	1,932	21.0	110,500	21.9%	<a href="#">Link</a>
PVD	O&G	26.6	1.30%	1.3	595	3.5	1,150	23.1	45,000	14.9%	<a href="#">Link</a>
POW	Utilities	13.1	0.40%	0.7	1,234	2.9	467	28.1	38,500	4.1%	<a href="#">Link</a>
VHC	Fishery	70.4	-1.50%	1.2	636	2.5	3,216	21.9	29,000	30.1%	<a href="#">Link</a>
GMD	Logistics	78.0	-1.00%	0.7	974	2.1	3,966	19.7	14,500	48.6%	<a href="#">Link</a>
VNM	Retail	75.4	0.90%	0.6	6,341	11.0	4,633	16.3	81,700	51.6%	<a href="#">Link</a>
MSN	Retail	76.0	2.60%	1.2	4,627	13.6	466	163.0	27,700	26.1%	<a href="#">Link</a>
MWG	Retail	68.0	0.10%	1.3	4,000	22.8	1,507	45.1	63,800	47.1%	<a href="#">Link</a>
PNJ	Retail	99.6	-0.50%	1.0	1,341	4.6	6,133	16.2	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	62.0	0.60%	1.7	417	2.6	2,237	27.7	90,900	25.2%	<a href="#">Link</a>
FPT	Tech	132.1	1.10%	1.1	7,763	20.3	4,890	27.0	57,000	45.6%	<a href="#">Link</a>
CTR	Tech	124.5	-0.40%	1.4	573	1.0	4,590	27.1	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	26.8	-0.70%	0.9	3,135	5.6	4,137	6.5	1.6	19.2%	27.8%
VIB	Bank	18.1	-0.30%	1.1	2,162	1.5	3,048	5.9	1.2	4.3%	21.4%
TPB	Bank	17.7	0.60%	1.3	1,568	5.3	2,154	8.2	1.1	28.5%	14.2%
MSB	Bank	11.4	0.40%	1.1	1,193	1.8	2,366	4.8	0.7	22.7%	14.9%
EIB	Bank	18.4	-0.80%	0.8	1,292	6.6	1,273	14.5	1.4	2.8%	9.9%
HCM	Broker	29.3	0.50%	1.7	830	11.0	1,397	21.0	1.9	45.7%	10.6%
VCI	Broker	45.5	1.10%	1.7	809	6.7	1,763	25.8	2.3	20.7%	9.6%
VND	Broker	15.2	-0.30%	1.5	931	5.5	1,591	9.6	1.3	13.3%	15.0%
BSI	Broker	48.6	-0.40%	1.7	436	0.8	2,165	22.4	2.0	40.0%	9.3%
SHS	Broker	15.6	-4.90%	1.7	510	6.2	1,338	11.7	1.2	8.9%	10.5%
CTD	Const	62.6	-0.80%	1.3	252	0.9	2,996	20.9	0.7	46.7%	3.6%
HHV	Const	12.3	1.20%	1.5	214	3.2	860	14.3	0.6	7.9%	4.4%
LCG	Const	10.8	-0.90%	1.5	84	1.1	771	14.1	0.8	2.2%	5.7%
SZC	IP	36.3	-1.40%	1.1	263	1.2	1,549	23.4	2.2	3.1%	12.1%
SIP	IP	74.2	0.00%	1.5	624	0.7	5,925	12.5	3.5	2.3%	29.0%
PHR	IP	57.1	0.20%	1.0	311	0.4	3,028	18.9	2.0	18.5%	12.1%
DIG	RE	22.4	-1.80%	1.8	551	16.9	152	148.0	1.8	4.1%	1.1%
CEO	RE	16.1	-2.40%	2.0	350	2.3	313	51.4	1.4	4.7%	2.1%
KBC	IP	26.5	1.70%	1.5	818	2.8	300	88.4	1.1	20.6%	1.7%
VGC	IP	42.6	0.40%	1.2	769	1.2	1,776	24.0	2.3	4.4%	8.2%
GVR	IP	34.5	1.80%	1.5	5,553	2.3	704	49.0	2.7	0.5%	6.5%
NKG	Material	20.8	0.70%	1.7	221	3.3	1,580	13.2	0.9	12.6%	7.4%
BMP	Material	103.9	1.90%	1.2	342	0.7	11,420	9.1	3.2	82.9%	34.6%
IJC	RE	13.9	0.40%	1.4	211	0.5	683	20.3	1.1	4.5%	6.0%
DXG	RE	15.4	-1.00%	1.6	448	6.5	249	62.1	1.0	15.7%	1.9%
VRE	RE	20.1	2.00%	1.3	1,838	9.1	1,975	10.2	1.1	22.2%	11.9%
PDR	RE	21.6	-1.10%	1.8	759	7.2	557	38.8	1.7	6.8%	5.0%
DIG	RE	22.4	-1.80%	1.8	551	16.9	152	148.0	1.8	4.1%	1.1%
HUT	Const	17.0	-1.20%	1.2	610	0.7	64	265.1	1.8	0.0%	1.7%
C4G	Const	9.0	0.00%	1.3	-	0.7	507	17.8	0.8	0.0%	4.8%
CSV	Chemicals	39.0	-0.40%	1.8	173	1.6	4,748	8.2	1.1	2.5%	15.2%
DHC	Chemicals	37.0	-0.10%	1.2	120	0.3	3,067	12.1	1.6	39.3%	13.3%
DRC	Tyre	33.4	1.20%	0.8	160	0.4	2,509	13.3	2.1	11.6%	16.5%
PC1	Utlilities	28.2	0.40%	1.3	352	1.1	892	31.6	1.6	13.8%	6.1%
HDG	Utlilities	28.8	3.00%	1.3	389	6.6	1,989	14.5	1.6	15.6%	11.8%
GEX	Utlilities	21.2	0.00%	1.6	725	3.1	1,245	17.0	1.4	8.3%	7.0%
QTP	Utlilities	14.2	-3.40%	0.6	-	0.1	1,357	10.5	1.2	1.2%	11.2%
PLX	O&G	47.0	2.00%	0.9	2,400	2.4	2,874	16.3	2.4	18.2%	13.8%
BSR	O&G	23.1	0.00%	1.0	-	4.8	2,408	9.6	1.2	0.0%	13.4%
PLC	O&G	26.0	0.40%	1.5	84	0.1	728	35.7	1.7	0.5%	4.7%
ANV	Fishery	31.4	0.50%	1.4	168	0.6	262	119.5	1.4	1.0%	1.2%
PTB	Material	64.0	0.00%	0.7	172	0.2	4,903	13.1	1.5	24.9%	11.9%
VSC	Logistics	18.6	0.80%	1.4	200	1.7	713	26.1	1.2	3.0%	7.3%
HAH	Logistics	39.8	-2.00%	1.2	194	5.4	2,800	14.2	1.7	7.8%	10.6%
VTP	Logistics	75.2	1.10%	1.5	368	0.8	2,943	25.6	5.7	6.9%	22.8%
DBC	Retail	27.9	-0.90%	1.6	362	6.3	979	28.5	1.4	9.0%	5.0%
FRT	Retail	182.4	-0.10%	0.6	1,000	2.8	(414)	-440.2	14.9	36.4%	11.8%
QNS	Retail	47.0	-0.60%	0.6	-	0.3	6,678	7.0	1.9	12.2%	28.7%
TNG	Textile	26.6	-5.00%	1.2	131	2.8	2,254	11.8	1.7	15.8%	14.7%
PVT	Logistics	28.2	0.70%	0.9	405	1.5	2,802	10.1	1.4	13.1%	14.2%
DPM	Fertilizer	36.0	3.50%	1.3	566	6.4	1,703	21.1	1.2	9.0%	5.5%
REE	Utlilities	65.6	0.50%	1.1	1,243	2.5	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.

DISCLAIMER

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