

STOCK MARKET

After surpassing the 1,290 threshold, the VN-Index faced profit-taking pressure and closed at 1,279.77 points, down nearly 6 points compared to yesterday. The market breadth leaned towards the negative side. Regarding foreign investors' trading activities, today they recorded net selling on both the HSX and HNX exchanges. Currently, the VN-Index continues to fluctuate within the range of 1,270 – 1,300, and there are no signs that this trend is ending.

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 21/10/2024, warrants fluctuated according to the recovery of the underlying stocks.

HIGHLIGHT

- VN-Index **-5.69** points, closing at **1279.77** points. HNX-Index **-1.78** points, closing at **227.43** points.
- Pulling the index up: **VHM (+2.86)**, **EIB (+0.66)**, **VIC (+0.43)**, **VRE (+0.20)**, **VPB (+0.20)**.
- Pulling the index down: **CTG (-0.96)**, **BID (-0.89)**, **GVR (-0.62)**, **VCB (-0.54)**, **FPT (-0.53)**.
- The matched trade value of VN-Index reached VND **13,448** billion, decreased **-2.92%** compared to the previous session. The total transaction value reached VND 14,300 billion.
- The trading range is 9.23 points. The market had **99** gainers, 46 remaining unchanged, **287** losers.
- Foreign investors' net selling value: VND **-263.37** billion on HOSE, including **STB (VND -129.83 billion)**, **FPT (VND -63.66 billion)**, **HPG (VND -56.02 billion)**, **SSI (VND -53.91 billion)**, **FUEVFNVD (VND -41.62 billion)**. Foreign investors were net sellers on HNX with the value of VND **-6.16** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.36%**. Positive stocks: **STB (+2.75%)**, **VHC (+0.69%)**, **TCB (+0.41%)**.
- BSC50 **-0.25%**. Positive stocks: **SZC (+3.59%)**, **EIB (+3.46%)**, **HDB (+1.50%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.36%	-0.25%	0.09%	0.15%
1 week	-0.47%	-0.69%	-0.15%	0.03%
1 months	1.13%	1.50%	1.45%	2.02%
3 months	2.97%	0.17%	2.24%	4.18%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,279.77	227.43	92.14
% 1D	-0.44%	-0.78%	-0.60%
TV (bil VND)	13,448	736	453
%1D	-2.92%	11.09%	14.16%
Foreign (bil VND)	-263.37	-6.16	1.30

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VHM	104.44	STB	-129.83
DXG	50.51	FPT	-63.66
MSN	46.59	HPG	-56.02
CMG	43.11	SSI	-53.91
VPB	40.88	FUEVFNVD	-41.62

Overview of global stock markets

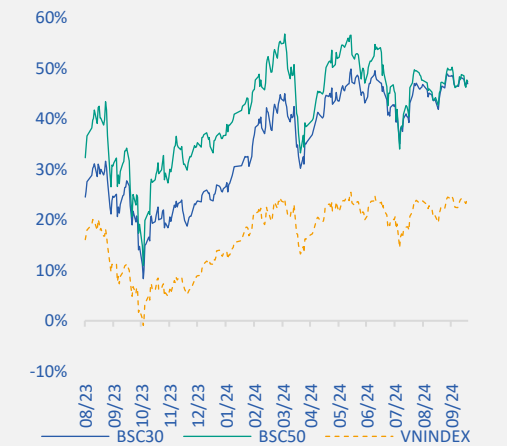
		%D	%W
SPX	5,865	0.40%	0.85%
FTSE100	8,366	0.09%	0.88%
Eurostoxx	4,974	-0.17%	-1.22%
Shanghai	3,268	0.20%	-0.49%
Nikkei	39,030	0.11%	-1.45%

Source: Bloomberg

	Close	%
Commodities		
Brent	73	0.26%
Gold	2,721	
Exchange rate		
USD/VND	25,400	0.24%
EUR/VND	28,166	0.46%
JPY/VND	172	0.58%
Interest rates		
10Y-Gov bond rate	2.69%	-0.07%
1M-interbank rate	3.34%	

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	47.80	5.64%	2.86	4.35
EIB	20.80	6.94%	0.66	1.86
VIC	42.25	1.08%	0.43	3.82
VRE	19.10	1.87%	0.20	2.27
VPB	20.65	0.49%	0.20	7.93

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	50.10	2.24%	0.17	0.20
HUT	16.40	0.61%	0.07	0.89
MVB	19.80	3.66%	0.06	0.11
VCS	63.30	0.64%	0.05	0.16
PHN	77.00	10.00%	0.04	0.01

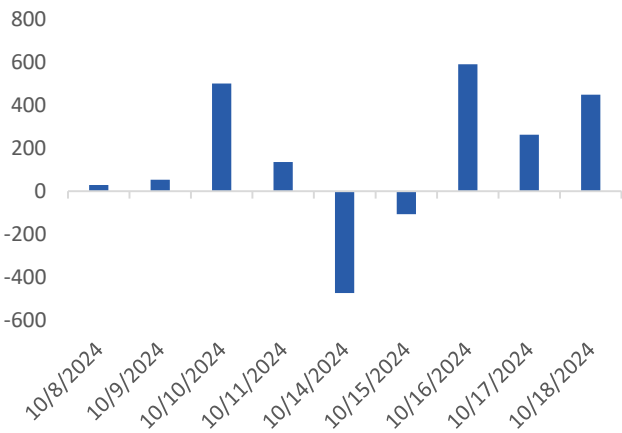
Top 5 gainers on the HSX

	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)
CTG	35.50	-2.07%	-0.96	5.37
BID	49.65	-1.29%	-0.89	5.70
GVR	35.20	-1.81%	-0.62	4.00
VCB	92.00	-0.43%	-0.54	5.59
FPT	135.50	-1.09%	-0.53	1.47

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
MBS	29.20	-2.01%	-0.25	0.55
SHS	14.90	-2.61%	-0.24	0.81
NTP	59.70	-3.55%	-0.21	0.13
PVS	38.60	-1.03%	-0.15	0.48
THD	34.90	-0.85%	-0.09	0.38

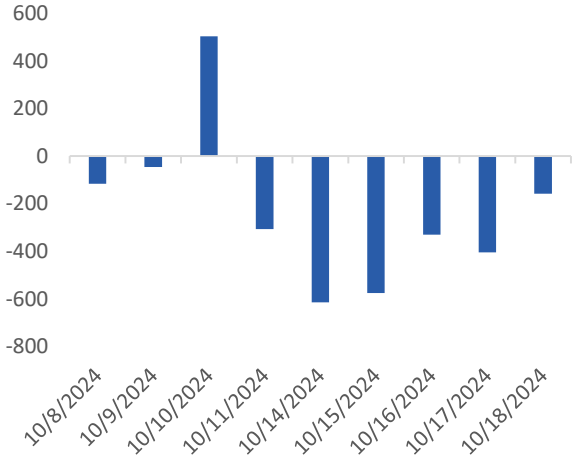
Top 5 losers on the HSX

	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 ownership	Link
VCB	Bank	92.4	0.20%	0.6	20,666	4.3	5,962	15.5	105,000	23.4%	<a href="#">Link</a>
BID	Bank	50.3	0.00%	1.1	11,474	6.8	4,006	12.6	54,578	17.1%	<a href="#">Link</a>
VPB	Bank	20.6	-1.70%	1.0	6,524	20.1	1,461	14.1	23,685	24.8%	<a href="#">Link</a>
TCB	Bank	24.4	0.40%	1.3	6,893	15.1	3,047	8.0	-	21.9%	<a href="#">Link</a>
MBB	Bank	25.8	-0.60%	1.0	5,468	19.0	4,018	6.4	24,400	23.2%	<a href="#">Link</a>
STB	Bank	35.6	2.70%	1.3	2,682	46.8	4,340	8.2	31,200	23.7%	<a href="#">Link</a>
CTG	Bank	36.2	-0.80%	1.3	7,790	10.2	3,782	9.6	19,100	296.5%	<a href="#">Link</a>
ACB	Bank	26.1	-0.20%	0.8	4,665	12.0	3,676	7.1	42,500	30.0%	<a href="#">Link</a>
SSI	Broker	27.4	-0.40%	1.4	2,147	13.0	1,882	14.5	45,900	33.1%	<a href="#">Link</a>
IDC	IP	55.9	0.40%	1.1	738	2.3	5,573	10.0	-	23.9%	<a href="#">Link</a>
HPG	Material	27.0	-1.10%	1.1	6,898	17.5	1,746	15.4	23,300	22.3%	<a href="#">Link</a>
HSG	Material	20.6	-1.00%	1.6	512	4.3	1,844	11.2	79,900	11.0%	<a href="#">Link</a>
VHM	RE	45.2	0.30%	1.0	7,885	16.2	5,350	8.5	38,900	13.8%	<a href="#">Link</a>
KDH	RE	32.8	-1.60%	1.2	1,313	2.4	765	42.9	44,100	34.5%	<a href="#">Link</a>
NLG	RE	38.9	0.00%	1.2	599	3.9	1,102	35.3	46,100	49.7%	<a href="#">Link</a>
DGC	Chemicals	114.0	-0.50%	1.5	1,732	3.8	7,898	14.4	85,000	18.1%	<a href="#">Link</a>
DCM	Fertilizer	37.0	0.00%	1.3	783	2.5	2,828	13.1	41,000	7.4%	<a href="#">Link</a>
GAS	O&G	71.7	0.30%	0.6	6,722	0.9	4,760	15.1	36,000	0.9%	<a href="#">Link</a>
PVS	O&G	39.0	-1.30%	0.9	746	2.9	1,932	20.2	110,500	21.7%	<a href="#">Link</a>
PVD	O&G	26.2	-1.10%	1.3	584	2.3	1,155	22.7	45,000	13.3%	<a href="#">Link</a>
POW	Utilities	12.5	-0.40%	0.6	1,171	1.7	463	27.0	38,500	3.8%	<a href="#">Link</a>
VHC	Fishery	73.2	0.70%	1.4	658	1.8	3,234	22.6	29,000	29.2%	<a href="#">Link</a>
GMD	Logistics	71.8	-1.80%	0.9	892	3.6	4,054	17.7	14,500	48.6%	<a href="#">Link</a>
VNM	Retail	67.4	-0.30%	0.6	5,637	4.3	4,633	14.5	81,700	51.8%	<a href="#">Link</a>
MSN	Retail	80.4	-0.70%	1.3	4,868	16.4	466	172.4	27,700	26.5%	<a href="#">Link</a>
MWG	Retail	65.7	-0.20%	1.2	3,844	16.2	1,507	43.6	63,800	46.9%	<a href="#">Link</a>
PNJ	Retail	94.9	-0.20%	1.0	1,283	1.7	6,132	15.5	83,500	48.5%	<a href="#">Link</a>
DGW	Retail	45.4	-1.30%	1.8	395	1.7	2,236	20.3	90,900	24.7%	<a href="#">Link</a>
FPT	Tech	137.0	0.00%	1.1	8,065	11.9	4,890	28.0	57,000	46.0%	<a href="#">Link</a>
CTR	Tech	132.0	-0.60%	1.4	604	1.7	4,590	28.8	108,000	9.5%	<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	27.0	1.50%	0.9	3,147	9.1	4,137	6.5	1.6	18.1%	27.8%
VIB	Bank	19.5	0.80%	1.1	2,325	23.4	3,048	6.4	1.3	4.2%	21.4%
TPB	Bank	17.8	-0.60%	1.2	1,882	21.0	2,154	8.3	1.1	30.0%	14.2%
MSB	Bank	13.0	-1.10%	1.1	1,358	13.3	2,366	5.5	0.8	29.1%	14.9%
EIB	Bank	19.4	3.50%	0.7	1,450	21.2	1,273	15.3	1.4	2.6%	9.9%
HCM	Broker	30.4	-0.50%	1.6	877	13.6	1,397	21.8	2.0	45.6%	10.6%
VCI	Broker	36.1	-1.60%	1.6	830	12.6	1,763	20.5	1.8	19.5%	9.6%
VND	Broker	14.8	-0.30%	1.5	905	4.6	1,591	9.3	1.3	12.4%	15.0%
BSI	Broker	51.2	-0.80%	1.7	457	1.3	2,165	23.7	2.1	40.1%	9.3%
SHS	Broker	15.3	-0.60%	1.7	498	2.0	1,338	11.4	1.1	7.0%	10.5%
CTD	Const	63.4	0.50%	1.4	254	1.0	3,098	20.5	0.7	46.6%	3.6%
HHV	Const	11.9	-0.80%	1.7	206	1.6	869	13.7	0.6	8.0%	4.4%
LCG	Const	10.8	-0.50%	1.6	83	0.4	766	14.1	0.8	2.1%	5.7%
SZC	IP	39.0	3.60%	1.1	281	5.9	1,572	24.8	2.3	3.0%	12.1%
SIP	IP	73.2	0.10%	1.4	617	0.3	5,931	12.3	3.4	2.5%	29.0%
PHR	IP	57.9	0.00%	1.0	314	0.2	3,028	19.1	2.1	18.2%	12.1%
DIG	RE	20.4	-3.10%	1.7	498	4.2	151	135.1	1.6	5.1%	1.1%
CEO	RE	15.1	-1.90%	1.7	326	1.7	318	47.4	1.3	5.0%	2.1%
KBC	IP	27.7	0.00%	1.5	851	4.8	300	92.4	1.2	20.3%	1.7%
VGC	IP	42.8	0.00%	1.3	767	1.4	1,776	24.1	2.4	3.8%	8.2%
GVR	IP	35.8	-0.40%	1.4	5,738	6.5	693	51.7	2.8	0.5%	6.5%
NKG	Material	20.9	-1.40%	1.6	220	2.8	1,580	13.2	1.0	9.4%	7.4%
BMP	Material	128.4	-1.20%	1.3	421	1.3	12,420	10.3	3.6	83.8%	34.6%
IJC	RE	13.6	-0.70%	1.4	206	0.7	683	19.9	1.0	4.9%	6.0%
DXG	RE	16.0	-0.30%	1.5	463	9.4	249	64.5	1.1	18.5%	1.9%
VRE	RE	18.8	0.00%	1.4	1,705	3.8	1,975	9.5	1.1	21.6%	11.9%
PDR	RE	20.9	-0.70%	1.8	730	5.8	500	41.8	1.7	7.0%	5.0%
DIG	RE	20.4	-3.10%	1.7	498	4.2	151	135.1	1.6	5.1%	1.1%
HUT	Const	16.3	-0.60%	1.1	582	0.4	64	256.9	1.7	1.6%	1.7%
C4G	Const	8.6	0.00%	1.2	-	0.1	503	17.1	0.8	0.0%	4.8%
CSV	Chemicals	36.2	-0.10%	1.9	160	1.2	4,748	7.6	1.1	1.8%	15.2%
DHC	Chemicals	36.4	-0.70%	1.1	117	0.1	3,067	11.9	1.6	39.1%	13.3%
DRC	Tyre	29.2	-1.00%	0.8	139	0.6	2,509	11.6	1.9	10.1%	16.5%
PC1	Utlilities	27.6	0.40%	1.3	343	1.0	1,203	22.9	1.6	13.4%	6.1%
HDG	Utlilities	27.5	-1.60%	1.3	370	2.1	1,958	14.0	1.5	14.6%	11.8%
GEX	Utlilities	20.5	0.50%	1.5	705	3.3	1,245	16.5	1.3	7.1%	7.0%
QTP	Utlilities	13.9	0.00%	0.6	-	0.1	1,357	10.2	1.1	1.0%	11.2%
PLX	O&G	42.4	0.20%	0.8	2,153	1.4	2,879	14.7	2.1	17.8%	13.8%
BSR	O&G	22.5	-0.90%	1.0	-	2.9	2,408	9.3	1.2	0.0%	13.4%
PLC	O&G	23.6	0.00%	1.5	76	0.0	734	32.2	1.6	0.3%	4.7%
ANV	Fishery	33.3	0.30%	1.6	177	1.1	114	292.9	1.6	0.7%	1.2%
PTB	Material	61.3	-0.50%	1.0	164	0.2	4,899	12.5	1.5	24.3%	11.9%
VSC	Logistics	17.2	-0.30%	1.3	198	0.8	713	24.2	1.1	2.4%	7.3%
HAH	Logistics	42.2	-1.60%	1.3	205	3.7	2,800	15.1	1.8	9.9%	10.6%
VTP	Logistics	86.6	1.30%	1.7	422	3.9	2,893	29.9	6.6	7.2%	22.8%
DBC	Retail	29.5	0.50%	1.5	395	4.9	1,604	18.4	1.5	12.1%	5.0%
FRT	Retail	177.3	-0.40%	0.8	967	2.1	(414)	-427.9	14.5	37.5%	11.8%
QNS	Retail	49.5	0.00%	0.6	-	0.8	6,678	7.4	2.0	12.0%	28.7%
TNG	Textile	24.9	-0.40%	1.3	122	1.0	2,254	11.0	1.6	16.7%	14.7%
PVT	Logistics	28.0	-0.70%	1.1	398	1.3	2,805	10.0	1.4	13.3%	14.2%
DPM	Fertilizer	34.4	-0.30%	1.3	539	2.0	1,703	20.2	1.1	8.0%	5.5%
REE	Utlilities	64.8	-0.20%	1.1	1,221	0.7	3,804	17.0	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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