

STOCK MARKET

The VN-Index continued to decline from the 1,270 level, closing at 1,255.23 points, down more than 12 points compared to yesterday. Market breadth leaned towards the negative side with 16 out of 18 sectors declining, led by the Insurance, followed by Basic Resources, Financial Services, and others. On the contrary, the Retail had a positive trading session today. Regarding foreign investors' transactions, they were net sellers on the HSX and net buyers on the HNX. The VN-Index has dropped to the 1,250 – 1,255 support range; in the upcoming sessions, if the index continues to fall below this range, it is likely to return to around the 1,230 level.

FUTURES CONTRACTS

All futures contracts decreased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 10/09/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **-12.50** points, closing at **1255.23** points. HNX-Index **-1.77** points, closing at **231.69** points.
- Pulling the index up: **VJC (+0.16)**, **TPB (+0.11)**, **MWG (+0.11)**, **LPB (+0.10)**, **BMP (+0.09)**.
- Pulling the index down: **VCB (-1.63)**, **BID (-0.76)**, **SSB (-0.72)**, **HPG (-0.70)**, **TCB (-0.68)**.
- The matched trade value of VN-Index reached VND **13,898** billion, increased **35.31%** compared to the previous session. The total transaction value reached VND 15,562 billion.
- The trading range is 19.61 points. The market had **94** gainers, 64 remaining unchanged, **320** losers.
- Foreign investors' net selling value: VND **-387.68** billion on HOSE, including **MSN (VND -109.12 billion)**, **FPT (VND -104.72 billion)**, **VPB (VND -78.56 billion)**, **HPG (VND -64.31 billion)**, **HDB (VND -56.36 billion)**. Foreign investors were net buyers on HNX with the value of VND **7.47** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.15%**. Positive stocks: **VHC (+1.43%)**, **MSN (+0.80%)**, **DCM (+0.67%)**.
- BSC50 **-0.40%**. Positive stocks: **BMP (+4.68%)**, **DBC (+3.11%)**, **ANV (+1.58%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.15%	-0.40%	-0.99%	-1.00%
1 week	-0.70%	-1.25%	-0.63%	-0.80%
1 months	-0.24%	-0.91%	-0.44%	-0.44%
3 months	-1.53%	-2.91%	0.13%	0.71%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,255.23	231.69	92.36
% 1D	-0.99%	-0.76%	-0.69%
TV (bil VND)	13,898	974	521
%1D	35.31%	3.67%	28.07%
Foreign (bil VND)	-387.68	7.47	-4.46

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VHM	72.51	MSN	-109.12
VNM	67.87	FPT	-104.72
CTG	50.37	VPB	-78.56
VCI	37.93	HPG	-64.31
GMD	26.19	HDB	-56.36

Overview of global stock markets

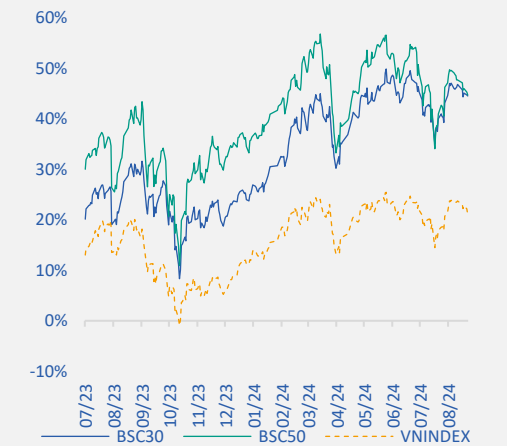
		%D	%W
SPX	5,471	1.16%	-3.14%
FTSE100	8,219	-0.62%	-0.96%
Eurostoxx	4,771	-0.11%	-2.80%
Shanghai	2,744	0.28%	-2.10%
Nikkei	36,183	0.06%	-6.57%

Source: Bloomberg

	Close	%
Commodities		
Brent	72	-0.03%
Gold	2,517	
Exchange rate		
USD/VND	24,830	-0.04%
EUR/VND	27,977	-0.19%
JPY/VND	176	
Interest rates		
10Y-Gov bond rate	0.00%	-2.73%
1M-interbank rate	4.40%	

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)
VJC	104.20	1.17%	0.16	0.54
TPB	17.80	1.14%	0.11	2.20
MWG	67.80	0.44%	0.11	1.46
LPB	30.95	0.49%	0.10	2.56
BMP	106.80	4.09%	0.09	0.08

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
DTK	13.30	4.72%	0.31	0.68
NTP	68.70	2.08%	0.13	0.13
BCF	39.70	8.47%	0.08	0.03
DNC	66.50	9.92%	0.04	0.01
CTP	36.00	9.76%	0.03	0.01

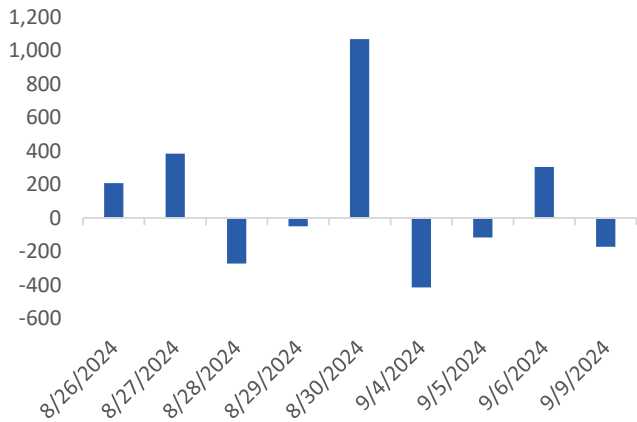
Top 5 gainers on the HSX

	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	89.00	-1.33%	-1.63	5.59
BID	48.50	-1.12%	-0.76	5.70
SSB	17.00	-6.08%	-0.72	2.84
HPG	25.15	-1.76%	-0.70	6.40
TCB	22.25	-1.77%	-0.68	7.05

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
KSV	52.80	-8.01%	-0.61	0.20
VIF	16.50	-5.71%	-0.24	0.35
SHS	14.80	-2.63%	-0.23	0.81
CEO	15.40	-3.14%	-0.19	0.54
PVI	45.20	-2.38%	-0.18	0.23

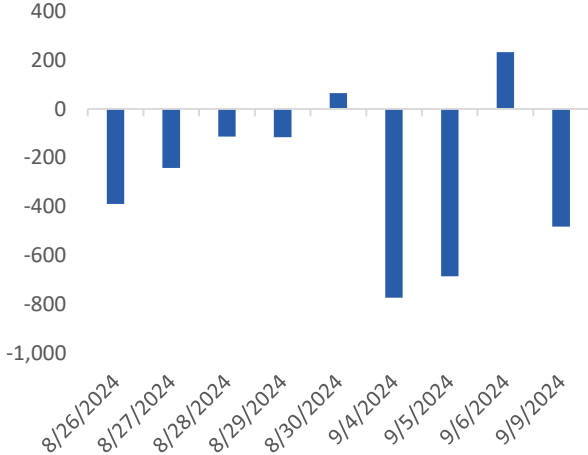
Top 5 losers on the HSX

	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	89.0	-1.30%	0.6	20,221	4.3	5,962	14.9	105,000	23.4%	Link
BID	Bank	48.5	-1.10%	1.1	11,239	4.7	4,006	12.1	54,578	17.2%	Link
VPB	Bank	18.2	-1.10%	0.9	5,854	15.2	1,461	12.4	23,685	25.7%	Link
TCB	Bank	22.2	-1.80%	1.2	6,372	12.8	3,047	7.3	-	20.8%	Link
MBB	Bank	23.8	-0.80%	1.0	5,123	12.0	4,018	5.9	24,400	23.2%	Link
STB	Bank	29.2	-1.00%	1.2	2,238	9.2	4,340	6.7	31,200	23.3%	Link
CTG	Bank	35.0	-1.40%	1.3	7,629	10.6	3,782	9.2	19,100	296.6%	Link
ACB	Bank	24.2	-0.80%	0.8	4,403	6.0	3,676	6.6	42,500	30.0%	Link
SSI	Broker	32.4	-1.50%	1.3	1,988	17.5	1,882	17.2	45,900	41.3%	Link
IDC	IP	58.6	-0.70%	1.1	786	1.9	5,573	10.5	-	24.5%	Link
HPG	Material	25.2	-1.80%	1.1	6,539	15.4	1,746	14.4	23,300	22.9%	Link
HSG	Material	20.0	-1.70%	1.6	502	6.8	1,844	10.9	79,900	13.2%	Link
VHM	RE	42.8	-0.50%	1.0	7,576	22.5	5,350	8.0	38,900	14.0%	Link
KDH	RE	37.3	-0.80%	1.2	1,379	5.5	765	48.7	44,100	38.0%	Link
NLG	RE	40.9	-0.50%	1.3	640	3.2	1,102	37.1	46,100	49.2%	Link
DGC	Chemicals	113.0	-0.40%	1.4	1,744	6.5	7,898	14.3	85,000	18.0%	Link
DCM	Fertilizer	37.0	-0.40%	1.2	796	6.2	2,828	13.1	41,000	7.4%	Link
GAS	O&G	84.1	-0.70%	0.6	7,852	6.5	4,760	17.7	36,000	1.9%	Link
PVS	O&G	40.7	0.00%	1.0	791	3.1	1,932	21.1	110,500	22.3%	Link
PVD	O&G	26.6	-0.60%	1.3	602	2.5	1,155	23.1	45,000	14.4%	Link
POW	Utilities	13.0	-0.40%	0.7	1,238	1.8	463	28.1	38,500	4.0%	Link
VHC	Fishery	70.5	0.60%	1.2	643	1.4	3,234	21.8	29,000	30.1%	Link
GMD	Logistics	77.3	0.00%	0.7	976	3.3	4,054	19.1	14,500	48.6%	Link
VNM	Retail	74.9	0.10%	0.6	6,363	10.1	4,633	16.2	81,700	51.7%	Link
MSN	Retail	75.2	-0.30%	1.2	4,625	18.1	466	161.3	27,700	26.1%	Link
MWG	Retail	67.8	0.40%	1.3	4,029	17.8	1,507	45.0	63,800	47.0%	Link
PNJ	Retail	99.0	-0.50%	1.0	1,346	3.0	6,132	16.1	83,500	49.0%	Link
DGW	Retail	62.4	-0.20%	1.7	424	4.5	2,237	27.9	90,900	25.4%	Link
FPT	Tech	130.0	-1.00%	1.1	7,718	22.2	4,890	26.6	57,000	46.0%	Link
CTR	Tech	123.1	-1.00%	1.4	572	0.7	4,590	26.8	108,000	9.3%	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	26.3	-0.80%	0.9	3,114	6.7	4,137	6.4	1.6	19.0%	27.8%
VIB	Bank	17.9	0.00%	1.1	2,168	1.0	3,048	5.9	1.2	4.2%	21.4%
TPB	Bank	17.8	1.10%	1.3	1,593	12.2	2,154	8.3	1.1	28.8%	14.2%
MSB	Bank	11.4	-0.40%	1.1	1,200	1.3	2,366	4.8	0.7	22.7%	14.9%
EIB	Bank	18.3	0.00%	0.8	1,295	3.1	1,273	14.4	1.4	2.8%	9.9%
HCM	Broker	28.8	-1.00%	1.7	826	13.8	1,397	20.6	1.9	45.7%	10.6%
VCI	Broker	44.2	-1.40%	1.7	794	8.2	1,763	25.1	2.2	19.8%	9.6%
VND	Broker	14.5	-4.60%	1.5	897	6.0	1,591	9.1	1.3	13.1%	15.0%
BSI	Broker	46.6	-2.60%	1.6	422	2.0	2,165	21.5	1.9	40.0%	9.3%
SHS	Broker	14.8	-2.60%	1.7	489	7.4	1,338	11.1	1.1	8.5%	10.5%
CTD	Const	61.0	-1.30%	1.3	248	1.0	2,996	20.4	0.7	46.7%	3.6%
HHV	Const	11.8	-2.50%	1.5	207	2.6	869	13.6	0.6	8.1%	4.4%
LCG	Const	10.8	-0.50%	1.5	84	0.7	766	14.0	0.8	2.1%	5.7%
SZC	IP	35.6	-1.10%	1.1	260	1.3	1,549	22.9	2.2	2.9%	12.1%
SIP	IP	72.0	-2.20%	1.5	616	0.8	5,931	12.1	3.3	2.4%	29.0%
PHR	IP	57.7	-1.00%	1.0	318	0.3	3,028	19.1	2.1	18.0%	12.1%
DIG	RE	22.5	0.20%	1.8	558	12.5	151	149.0	1.8	4.2%	1.1%
CEO	RE	15.4	-3.10%	2.0	338	5.6	318	48.4	1.3	2.5%	2.1%
KBC	IP	25.8	-2.10%	1.4	804	2.5	300	85.9	1.1	20.7%	1.7%
VGC	IP	41.0	-2.30%	1.2	747	1.7	1,776	23.1	2.3	4.2%	8.2%
GVR	IP	34.1	-1.20%	1.5	5,545	2.5	693	49.2	2.7	0.5%	6.5%
NKG	Material	21.0	-1.60%	1.6	225	2.0	1,580	13.3	1.0	12.3%	7.4%
BMP	Material	106.8	4.10%	1.2	355	2.4	11,420	9.4	3.3	82.9%	34.6%
IJC	RE	13.8	-0.40%	1.4	211	0.7	683	20.1	1.1	4.5%	6.0%
DXG	RE	14.8	-4.20%	1.6	434	12.0	249	59.5	1.0	16.2%	1.9%
VRE	RE	19.2	-4.50%	1.3	1,774	14.9	1,975	9.7	1.1	21.9%	11.9%
PDR	RE	20.9	-3.70%	1.7	742	12.2	557	37.5	1.7	6.9%	5.0%
DIG	RE	22.5	0.20%	1.8	558	12.5	151	149.0	1.8	4.2%	1.1%
HUT	Const	16.4	-1.20%	1.1	595	0.9	64	258.4	1.7	1.5%	1.7%
C4G	Const	8.9	0.00%	1.3	-	0.1	507	17.6	0.8	0.0%	4.8%
CSV	Chemicals	38.5	1.00%	1.8	173	2.8	4,748	8.1	1.1	2.2%	15.2%
DHC	Chemicals	36.9	-1.30%	1.1	121	0.2	3,067	12.0	1.6	39.3%	13.3%
DRC	Tyre	32.7	-1.20%	0.8	158	0.3	2,509	13.0	2.1	11.7%	16.5%
PC1	Ultilities	28.4	0.50%	1.2	358	3.2	892	31.8	1.7	13.7%	6.1%
HDG	Ultilities	28.1	-1.70%	1.3	384	5.1	1,989	14.1	1.6	15.3%	11.8%
GEX	Ultilities	20.8	-1.00%	1.6	727	4.1	1,245	16.7	1.3	8.1%	7.0%
QTP	Ultilities	14.1	-0.70%	0.6	-	0.1	1,357	10.4	1.2	1.1%	11.2%
PLX	O&G	46.4	-0.10%	0.9	2,397	1.9	2,879	16.1	2.3	18.1%	13.8%
BSR	O&G	23.3	-0.40%	1.0	-	5.2	2,408	9.7	1.2	0.0%	13.4%
PLC	O&G	25.3	-1.90%	1.5	83	0.3	734	34.5	1.7	0.5%	4.7%
ANV	Fishery	32.0	1.40%	1.4	173	1.1	114	281.4	1.5	1.0%	1.2%
PTB	Material	61.7	-2.50%	0.7	168	0.2	4,903	12.6	1.5	25.0%	11.9%
VSC	Logistics	18.1	-2.20%	1.3	196	2.3	713	25.4	1.1	2.6%	7.3%
HAH	Logistics	39.6	-0.30%	1.2	195	2.4	2,800	14.1	1.7	8.1%	10.6%
VTP	Logistics	72.9	-1.80%	1.5	361	2.2	2,943	24.8	5.5	6.9%	22.8%
DBC	Retail	29.6	2.20%	1.6	403	19.1	979	30.2	1.5	8.9%	5.0%
FRT	Retail	181.0	-0.50%	0.6	1,002	2.4	(414)	-436.8	14.8	36.6%	11.8%
QNS	Retail	46.7	-0.60%	0.6	-	0.4	6,678	7.0	1.9	12.2%	28.7%
TNG	Textile	26.5	0.00%	1.2	132	2.1	2,254	11.8	1.7	15.2%	14.7%
PVT	Logistics	27.6	-1.40%	0.9	400	2.1	2,805	9.9	1.4	13.1%	14.2%
DPM	Fertilizer	35.0	-1.40%	1.2	556	4.1	1,703	20.5	1.2	8.9%	5.5%
REE	Ultilities	65.0	-1.70%	1.1	1,244	1.7	3,804	17.1	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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