

STOCK MARKET

The VN-Index continued its decline right from the opening, but bottom-fishing demand helped the index close at 1,253.27 points, almost unchanged from yesterday. Market breadth leaned towards the negative with 11 out of 18 sectors declining, led by the Oil and Gas sector, followed by Media, Insurance, and others. On the other hand, the Tourism and Leisure sector and the Basic Resources sector had a positive trading session. Regarding foreign transactions, today saw a slight net buying on both the HSX and HNX exchanges. In the upcoming sessions, the VN-Index may consolidate around the 1,250 support level to gain momentum for a rebound; otherwise, the index might fall back to the 1,230 level.

FUTURES CONTRACTS

All futures contracts decreased according to the movement of VN30, except VN30F2503.

COVERED WARRANTS

During the trading session on 11/09/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **-1.96** points, closing at **1253.27** points. HNX-Index **-0.24** points, closing at **231.45** points.
- Pulling the index up: **HPG (+0.32)**, **HVN (+0.25)**, **VHM (+0.21)**, **FPT (+0.21)**, **MBB (+0.20)**.
- Pulling the index down: **VCB (-0.81)**, **SSB (-0.65)**, **NVL (-0.38)**, **GAS (-0.28)**, **BID (-0.28)**.
- The matched trade value of VN-Index reached VND **11,235** billion, decreased **-19.21%** compared to the previous session. The total transaction value reached VND 12,819 billion.
- The trading range is 12.07 points. The market had **170** gainers, 82 remaining unchanged, **218** losers.
- Foreign investors' net buying value: VND **7.33** billion on HOSE, including **FPT (VND 139.84 billion)**, **VNM (VND 66.19 billion)**, **VHM (VND 36.23 billion)**, **PDR (VND 27.29 billion)**, **DXG (VND 26.03 billion)**. Foreign investors were net buyers on HNX with the value of VND **1.09** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.59%**. Positive stocks: **FPT (+0.62%)**, **STB (+0.51%)**, **HSG (+0.25%)**.
- BSC50 **-0.51%**. Positive stocks: **PC1 (+0.88%)**, **PTB (+0.81%)**, **VGC (+0.61%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.59%	-0.51%	-0.16%	-0.01%
1 week	-1.40%	-2.28%	-1.61%	-1.79%
1 months	-0.24%	-1.04%	-0.44%	-0.44%
3 months	-1.69%	-2.90%	-0.07%	0.09%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,253.27	231.45	92.32
% 1D	-0.16%	-0.10%	-0.04%
TV (bil VND)	11,235	722	420
%1D	-19.21%	-25.86%	-19.33%
Foreign (bil VND)	7.33	1.09	0.60

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FPT	139.84	MSN	-70.95
VNM	66.19	MWG	-60.39
VHM	36.23	HPG	-54.46
PDR	27.29	VCB	-33.63
DXG	26.03	VCI	-28.58

Overview of global stock markets

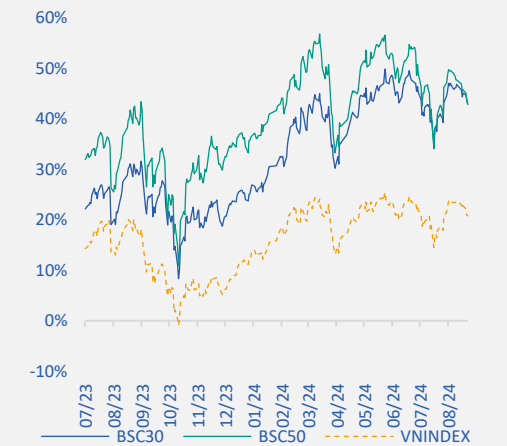
		%D	%W
SPX	5,496	0.45%	-0.60%
FTSE100	8,195	-0.13%	-0.90%
Eurostoxx	4,762	0.44%	-2.03%
Shanghai	2,722	-0.82%	-2.24%
Nikkei	35,592	-1.63%	-3.92%

Source: Bloomberg

	Close	%
Commodities		
Brent	70	-0.24%
Gold	2,517	
Exchange rate		
USD/VND	24,780	-0.20%
EUR/VND	27,915	-0.22%
JPY/VND	178	1.14%
Interest rates		
10Y-Gov bond rate	2.73%	
1M-interbank rate	4.41%	

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)
HPG	25.35	0.80%	0.32	6.40
HVN	20.80	2.21%	0.25	2.21
VHM	43.00	0.47%	0.21	4.35
FPT	130.60	0.46%	0.21	1.46
MBB	23.90	0.63%	0.20	5.31

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
MBS	27.20	3.82%	0.33	0.44
VIF	17.20	4.24%	0.18	0.35
KSV	53.30	0.95%	0.07	0.20
BAB	11.80	0.85%	0.06	0.90
HUT	16.50	0.61%	0.06	0.89

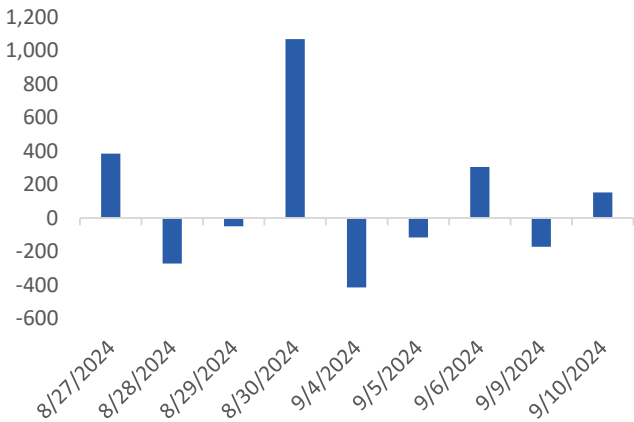
Top 5 gainers on the HSX

	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	88.40	-0.67%	-0.81	5.59
SSB	16.00	-5.88%	-0.65	2.84
NVL	11.85	-6.69%	-0.38	1.95
GAS	83.60	-0.59%	-0.28	2.30
BID	48.30	-0.41%	-0.28	5.70

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
PVI	44.40	-1.77%	-0.13	0.23
IDC	58.20	-0.68%	-0.09	0.33
PVS	40.50	-0.49%	-0.07	0.48
BCF	37.00	-6.80%	-0.06	0.03
NET	94.00	-3.98%	-0.06	0.02

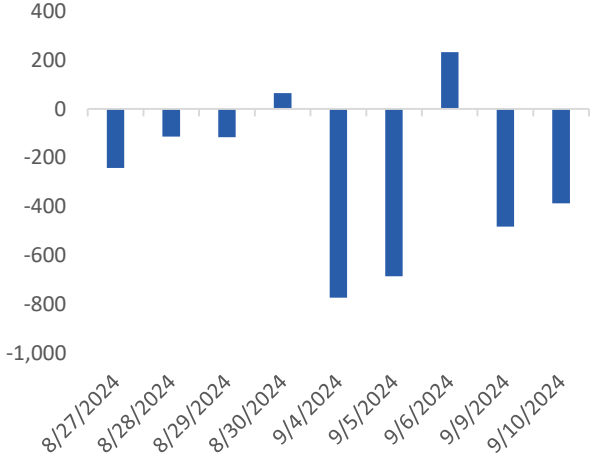
Top 5 losers on the HSX

	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	88.4	-0.70%	0.6	20,019	3.7	5,962	14.8	105,000	23.3%	Link
BID	Bank	48.3	-0.40%	1.1	11,156	2.8	4,006	12.1	54,578	17.2%	Link
VPB	Bank	18.2	0.60%	0.9	5,867	8.7	1,461	12.5	23,685	26.1%	Link
TCB	Bank	22.1	-0.70%	1.2	6,308	10.1	3,047	7.3	-	20.9%	Link
MBB	Bank	23.9	0.60%	1.0	5,139	9.4	4,018	5.9	24,400	23.2%	Link
STB	Bank	29.6	1.40%	1.2	2,261	7.6	4,340	6.8	31,200	22.9%	Link
CTG	Bank	35.0	0.00%	1.3	7,605	7.8	3,782	9.2	19,100	26.3%	Link
ACB	Bank	24.2	-0.40%	0.8	4,371	3.5	3,676	6.6	42,500	30.0%	Link
SSI	Broker	32.5	0.30%	1.3	1,987	11.7	1,882	17.3	45,900	41.3%	Link
IDC	IP	58.2	-0.70%	1.1	778	2.2	5,573	10.4	-	24.5%	Link
HPG	Material	25.4	0.80%	1.1	6,570	14.6	1,746	14.5	23,300	23.7%	Link
HSG	Material	20.3	1.20%	1.6	507	7.0	1,844	11.0	79,900	17.3%	Link
VHM	RE	43.0	0.50%	1.0	7,587	23.3	5,350	8.0	38,900	14.2%	Link
KDH	RE	37.3	0.00%	1.2	1,374	2.8	765	48.7	44,100	38.1%	Link
NLG	RE	40.9	0.00%	1.3	638	1.5	1,102	37.1	46,100	48.8%	Link
DGC	Chemicals	112.9	-0.10%	1.4	1,737	5.0	7,898	14.3	85,000	18.1%	Link
DCM	Fertilizer	37.3	0.80%	1.2	800	2.9	2,828	13.2	41,000	7.4%	Link
GAS	O&G	83.6	-0.60%	0.6	7,780	5.0	4,760	17.6	36,000	1.9%	Link
PVS	O&G	40.5	-0.50%	1.0	784	1.8	1,932	21.0	110,500	22.1%	Link
PVD	O&G	26.4	-0.90%	1.3	595	3.1	1,155	22.9	45,000	15.6%	Link
POW	Utilities	12.8	-1.20%	0.7	1,219	2.0	463	27.7	38,500	4.1%	Link
VHC	Fishery	69.9	-0.90%	1.2	636	0.8	3,234	21.6	29,000	29.8%	Link
GMD	Logistics	77.1	-0.30%	0.7	970	1.3	4,054	19.0	14,500	48.6%	Link
VNM	Retail	74.6	-0.40%	0.6	6,317	9.6	4,633	16.1	81,700	51.5%	Link
MSN	Retail	75.1	-0.10%	1.2	4,604	8.0	466	161.1	27,700	28.6%	Link
MWG	Retail	67.8	0.00%	1.3	4,016	18.7	1,507	45.0	63,800	46.9%	Link
PNJ	Retail	99.2	0.20%	1.0	1,345	2.6	6,132	16.2	83,500	49.0%	Link
DGW	Retail	61.6	-1.30%	1.7	417	3.1	2,236	27.6	90,900	25.1%	Link
FPT	Tech	130.6	0.50%	1.1	7,728	16.9	4,890	26.7	57,000	45.2%	Link
CTR	Tech	123.0	-0.10%	1.4	570	0.6	4,590	26.8	108,000	9.4%	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	26.4	0.20%	0.9	3,110	5.4	4,137	6.4	1.6	19.5%	27.8%
VIB	Bank	17.8	-0.30%	1.1	2,155	1.6	3,048	5.9	1.2	20.5%	21.4%
TPB	Bank	17.8	0.30%	1.3	1,592	2.8	2,154	8.3	1.1	28.4%	14.2%
MSB	Bank	11.3	-0.40%	1.1	1,190	1.6	2,366	4.8	0.7	29.5%	14.9%
EIB	Bank	18.4	0.30%	0.8	1,294	2.2	1,273	14.4	1.4	2.8%	9.9%
HCM	Broker	29.0	0.50%	1.7	827	11.6	1,397	20.8	1.9	45.3%	10.6%
VCI	Broker	43.8	-0.90%	1.7	784	11.4	1,763	24.8	2.2	20.1%	9.6%
VND	Broker	14.3	-1.40%	1.5	882	4.6	1,591	9.0	1.3	13.5%	15.0%
BSI	Broker	47.0	1.00%	1.6	425	0.9	2,165	21.7	1.9	40.0%	9.3%
SHS	Broker	14.8	0.00%	1.7	488	3.3	1,338	11.1	1.1	8.9%	10.5%
CTD	Const	62.0	1.60%	1.3	251	1.4	2,996	20.7	0.7	47.1%	3.6%
HHV	Const	11.8	-0.40%	1.5	206	2.4	869	13.5	0.6	7.7%	4.4%
LCG	Const	10.6	-1.40%	1.5	83	0.8	766	13.8	0.8	2.1%	5.7%
SZC	IP	35.2	-0.80%	1.1	257	1.0	1,549	22.8	2.1	3.2%	12.1%
SIP	IP	72.6	0.80%	1.5	619	0.5	5,931	12.2	3.4	2.0%	29.0%
PHR	IP	57.8	0.20%	1.0	317	0.3	3,028	19.1	2.1	18.5%	12.1%
DIG	RE	21.9	-2.70%	1.8	541	7.8	151	145.1	1.7	4.7%	1.1%
CEO	RE	15.3	-0.60%	2.0	335	3.1	318	48.1	1.3	4.8%	2.1%
KBC	IP	25.4	-1.40%	1.4	790	2.3	300	84.7	1.1	20.5%	1.7%
VGC	IP	41.6	1.50%	1.2	756	1.3	1,776	23.4	2.3	4.7%	8.2%
GVR	IP	34.1	0.00%	1.5	5,527	2.5	693	49.2	2.7	0.5%	6.5%
NKG	Material	21.4	1.70%	1.6	228	3.5	1,580	13.5	1.0	13.1%	7.4%
BMP	Material	108.8	1.90%	1.2	361	1.2	11,420	9.5	3.4	82.6%	34.6%
IJC	RE	13.8	0.00%	1.4	210	0.7	683	20.1	1.0	4.6%	6.0%
DXG	RE	14.9	0.70%	1.6	435	8.5	249	59.9	1.0	15.4%	1.9%
VRE	RE	19.1	-0.50%	1.3	1,759	6.5	1,975	9.7	1.1	22.2%	11.9%
PDR	RE	21.2	1.20%	1.7	748	10.7	557	38.0	1.7	6.4%	5.0%
DIG	RE	21.9	-2.70%	1.8	541	7.8	151	145.1	1.7	4.7%	1.1%
HUT	Const	16.5	0.60%	1.1	597	0.7	64	260.0	1.7	1.5%	1.7%
C4G	Const	8.9	0.00%	1.3	-	0.1	503	17.7	0.8	0.0%	4.8%
CSV	Chemicals	38.4	-0.30%	1.8	172	1.9	4,748	8.1	1.1	3.8%	15.2%
DHC	Chemicals	37.2	0.80%	1.1	121	0.2	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	32.2	-1.50%	0.8	155	0.2	2,509	12.8	2.0	11.7%	16.5%
PC1	Utlilities	28.8	1.80%	1.2	364	3.8	892	32.4	1.7	13.8%	6.1%
HDG	Utlilities	27.8	-1.20%	1.3	378	6.0	1,958	14.2	1.5	15.7%	11.8%
GEX	Utlilities	20.8	-0.20%	1.6	723	3.6	1,245	16.7	1.3	8.3%	7.0%
QTP	Utlilities	14.2	0.70%	0.6	-	0.1	1,357	10.5	1.2	1.2%	11.2%
PLX	O&G	45.8	-1.30%	0.9	2,358	1.6	2,879	15.9	2.3	18.2%	13.8%
BSR	O&G	23.3	0.00%	1.0	-	4.6	2,408	9.7	1.2	0.7%	13.4%
PLC	O&G	25.3	0.00%	1.5	83	0.0	734	34.5	1.7	0.5%	4.7%
ANV	Fishery	32.0	-0.20%	1.4	172	0.5	114	281.0	1.5	1.0%	1.2%
PTB	Material	61.9	0.30%	0.7	168	0.1	4,899	12.6	1.5	24.9%	11.9%
VSC	Logistics	16.7	-7.70%	1.3	180	1.3	713	23.4	1.0	3.1%	7.3%
HAH	Logistics	39.0	-1.50%	1.2	192	3.0	2,800	13.9	1.7	7.7%	10.6%
VTP	Logistics	73.5	0.80%	1.5	363	2.0	2,893	25.4	5.6	6.9%	22.8%
DBC	Retail	29.2	-1.50%	1.6	395	6.2	979	29.8	1.4	12.1%	5.0%
FRT	Retail	180.5	-0.30%	0.6	996	2.6	(414)	-435.6	14.8	36.1%	11.8%
QNS	Retail	47.1	0.90%	0.6	-	0.3	6,678	7.1	1.9	13.8%	28.7%
TNG	Textile	26.4	-0.40%	1.2	131	1.7	2,254	11.7	1.7	19.5%	14.7%
PVT	Logistics	27.8	0.50%	0.9	401	1.1	2,805	9.9	1.4	13.2%	14.2%
DPM	Fertilizer	34.9	-0.10%	1.2	553	3.4	1,703	20.5	1.2	8.8%	5.5%
REE	Utlilities	65.1	0.20%	1.1	1,242	1.3	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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