

STOCK MARKET

VN-Index traded within the 1,250 – 1,260 range throughout the day and ended the session at 1,251.71 points, down nearly 5 points compared to yesterday. Market breadth leaned negative with 9 out of 18 sectors declining, led by the Media and Utilities sectors. On the other hand, the Automotive & Parts and Construction & Materials sectors posted the strongest gains. Regarding foreign transactions, foreign investors were net sellers on the HSX and slightly net buyers on the HNX today. The market is still in the process of finding a balance point after the recent correction, so investors should trade cautiously in the upcoming sessions.

FUTURES CONTRACTS

All future contracts decreased according to the movements of VN30.

COVERED WARRANTS

During the trading session on 13/09/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

HIGHLIGHT

- VN-Index **-4.64** points, closing at **1251.71** points. HNX-Index **+0.52** points, closing at **232.42** points.
- Pulling the index up: **VCB (+0.55)**, **FPT (+0.25)**, **SAB (+0.22)**, **VRE (+0.17)**, **HDB (+0.14)**.
- Pulling the index down: **GAS (-0.99)**, **VNM (-0.90)**, **MSN (-0.31)**, **BID (-0.21)**, **TCB (-0.17)**.
- The matched trade value of VN-Index reached **VND 9,135 billion**, decreased **-1.50%** compared to the previous session. The total transaction value reached VND 11,148 billion.
- The trading range is 5.46 points. The market had **163** gainers, 90 remaining unchanged, **210** losers.
- Foreign investors' net selling value: **VND -72.51 billion** on HOSE, including **VHM (VND -188.98 billion)**, **MWG (VND -124.30 billion)**, **VCI (VND -85.52 billion)**, **HPG (VND -73.47 billion)**, **HSG (VND -36.84 billion)**. Foreign investors were net buyers on HNX with the value of **VND 5.09 billion**.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.20%**. Positive stocks: **SSI (+1.24%)**, **DGW (+0.86%)**, **FPT (+0.68%)**.
- BSC50 **+0.09%**. Positive stocks: **BMP (+2.39%)**, **HCM (+2.25%)**, **BSI (+1.28%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.20%	0.09%	-0.37%	-0.26%
1 week	-0.77%	-1.49%	-1.38%	-1.35%
1 months	-2.23%	-1.18%	-0.77%	-1.21%
3 months	1.46%	-0.16%	2.37%	3.23%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,251.71	232.42	92.95
% 1D	-0.37%	0.22%	0.24%
TV (bil VND)	9,135	650	358
%1D	-1.50%	-0.54%	4.26%
Foreign (bil VND)	-72.51	5.09	1.84

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
FPT	195.21	VHM	-188.98
STB	83.17	MWG	-124.30
DXG	56.29	VCI	-85.52
FTS	40.80	HPG	-73.47
TPB	38.93	HSG	-36.84

Overview of global stock markets

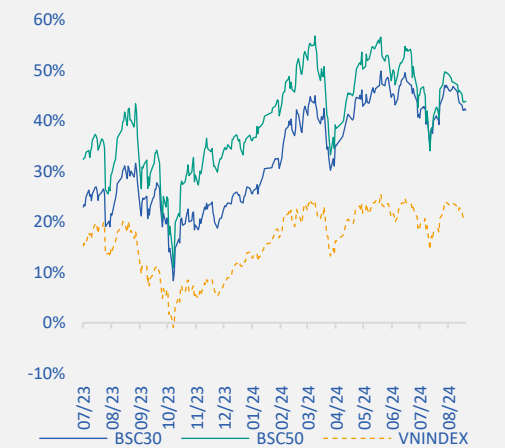
		%D	%W
SPX	5,596	0.75%	1.68%
FTSE100	8,239	-0.02%	0.71%
Eurostoxx	4,824	0.31%	1.59%
Shanghai	2,704	-0.47%	-2.22%
Nikkei	36,568	-0.78%	0.40%

Source: Bloomberg

	Close	%
Commodities		
Brent	72	1.93%
Gold	2,558	0.51%
Exchange rate		
USD/VND	24,730	-0.08%
EUR/VND	27,982	0.55%
JPY/VND	178	1.14%
Interest rates		
10Y-Gov bond rate	2.73%	
1M-interbank rate	4.65%	

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)
VCB	89.90	0.45%	0.55	5.59
FPT	133.00	0.53%	0.25	1.46
SAB	56.10	1.26%	0.22	1.28
VRE	19.30	1.58%	0.17	2.27
HDB	26.40	0.76%	0.14	2.91

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	55.50	4.91%	0.39	0.20
MBS	27.30	1.87%	0.16	0.44
PVI	45.30	1.57%	0.12	0.23
CEO	15.30	1.32%	0.08	0.54
BAB	11.90	0.85%	0.07	0.90

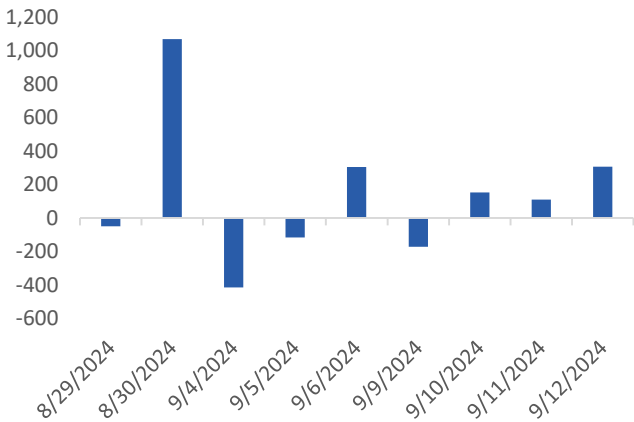
Top 5 gainers on the HSX

	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)
GAS	74.30	-2.37%	-0.99	2.30
VNM	72.90	-2.41%	-0.90	2.09
MSN	74.20	-1.20%	-0.31	1.44
BID	48.20	-0.31%	-0.21	5.70
TCB	22.20	-0.45%	-0.17	7.05

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
VIF	15.50	-9.36%	-0.36	0.35
VNR	23.60	-4.07%	-0.11	0.17
PVS	40.40	-0.74%	-0.10	0.48
SEB	47.00	-4.08%	-0.04	0.03
SGC	106.30	-7.16%	-0.04	0.01

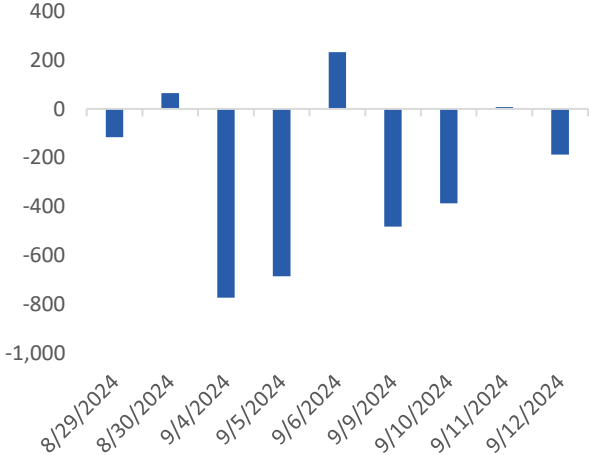
Top 5 losers on the HSX

	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	89.5	1.20%	0.6	20,285	5.8	5,962	15.0	105,000	23.3%	<a href="#">Link</a>
BID	Bank	48.4	0.10%	1.1	11,177	2.2	4,006	12.1	54,578	17.2%	<a href="#">Link</a>
VPB	Bank	18.5	1.40%	0.9	5,952	17.0	1,461	12.7	23,685	26.1%	<a href="#">Link</a>
TCB	Bank	22.3	0.90%	1.2	6,371	8.2	3,047	7.3	-	20.9%	<a href="#">Link</a>
MBB	Bank	24.0	0.40%	1.0	5,164	5.5	4,018	6.0	24,400	23.2%	<a href="#">Link</a>
STB	Bank	29.7	0.30%	1.2	2,270	7.0	4,340	6.8	31,200	22.9%	<a href="#">Link</a>
CTG	Bank	35.0	0.10%	1.3	7,622	7.1	3,782	9.3	19,100	26.3%	<a href="#">Link</a>
ACB	Bank	24.4	1.20%	0.8	4,429	2.6	3,676	6.7	42,500	30.0%	<a href="#">Link</a>
SSI	Broker	32.2	-0.80%	1.3	1,974	7.8	1,882	17.1	45,900	41.3%	<a href="#">Link</a>
IDC	IP	58.3	0.20%	1.1	780	1.2	5,573	10.5	-	24.5%	<a href="#">Link</a>
HPG	Material	25.1	-1.00%	1.1	6,510	9.2	1,746	14.4	23,300	23.7%	<a href="#">Link</a>
HSG	Material	20.2	-0.70%	1.6	503	4.0	1,844	10.9	79,900	17.3%	<a href="#">Link</a>
VHM	RE	43.1	0.20%	1.0	7,610	9.9	5,350	8.1	38,900	14.2%	<a href="#">Link</a>
KDH	RE	37.2	-0.40%	1.2	1,370	1.7	765	48.6	44,100	38.1%	<a href="#">Link</a>
NLG	RE	40.9	0.00%	1.3	638	1.1	1,102	37.1	46,100	48.8%	<a href="#">Link</a>
DGC	Chemicals	113.5	0.50%	1.4	1,748	9.1	7,898	14.4	85,000	18.1%	<a href="#">Link</a>
DCM	Fertilizer	37.8	1.30%	1.2	812	14.4	2,828	13.4	41,000	7.4%	<a href="#">Link</a>
GAS	O&G	83.6	0.00%	0.6	7,786	6.0	4,760	17.6	36,000	1.9%	<a href="#">Link</a>
PVS	O&G	40.7	0.50%	1.0	789	2.1	1,932	21.1	110,500	22.1%	<a href="#">Link</a>
PVD	O&G	26.4	0.00%	1.3	595	1.7	1,155	22.9	45,000	15.6%	<a href="#">Link</a>
POW	Utilities	12.9	0.40%	0.7	1,225	0.9	463	27.9	38,500	4.1%	<a href="#">Link</a>
VHC	Fishery	70.3	0.60%	1.2	640	1.0	3,234	21.7	29,000	29.8%	<a href="#">Link</a>
GMD	Logistics	77.5	0.50%	0.7	976	2.8	4,054	19.1	14,500	48.6%	<a href="#">Link</a>
VNM	Retail	74.7	0.10%	0.6	6,331	6.2	4,633	16.1	81,700	51.5%	<a href="#">Link</a>
MSN	Retail	75.1	0.00%	1.2	4,608	5.1	466	161.1	27,700	28.6%	<a href="#">Link</a>
MWG	Retail	67.5	-0.40%	1.3	4,002	10.6	1,507	44.8	63,800	46.9%	<a href="#">Link</a>
PNJ	Retail	99.4	0.20%	1.0	1,348	2.7	6,132	16.2	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	60.6	-1.60%	1.7	410	4.7	2,236	27.1	90,900	25.1%	<a href="#">Link</a>
FPT	Tech	132.3	1.30%	1.1	7,835	22.1	4,890	27.1	57,000	45.2%	<a href="#">Link</a>
CTR	Tech	124.4	1.10%	1.4	577	1.0	4,590	27.1	108,000	9.4%	<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 ownership	ROE (%)
HDB	Bank	26.2	-0.60%	0.9	3,094	5.2	4,137	6.3	1.6	19.5%	27.8%
VIB	Bank	18.2	1.70%	1.1	2,193	1.3	3,048	6.0	1.2	20.5%	21.4%
TPB	Bank	18.2	1.70%	1.3	1,620	21.3	2,154	8.4	1.1	28.4%	14.2%
MSB	Bank	11.4	0.40%	1.1	1,197	0.8	2,366	4.8	0.7	29.5%	14.9%
EIB	Bank	18.4	0.00%	0.8	1,295	2.0	1,273	14.4	1.4	2.8%	9.9%
HCM	Broker	28.8	-0.50%	1.7	824	6.1	1,397	20.6	1.9	45.3%	10.6%
VCI	Broker	33.4	-23.70%	1.7	598	8.3	1,763	18.9	1.7	20.1%	9.6%
VND	Broker	14.3	0.00%	1.5	883	2.1	1,591	9.0	1.3	13.5%	15.0%
BSI	Broker	47.0	0.00%	1.6	425	0.5	2,165	21.7	1.9	40.0%	9.3%
SHS	Broker	14.7	-0.70%	1.7	485	3.2	1,338	11.0	1.1	8.9%	10.5%
CTD	Const	62.3	0.50%	1.3	252	0.7	2,996	20.8	0.7	47.1%	3.6%
HHV	Const	11.8	0.00%	1.5	206	1.2	869	13.5	0.6	7.7%	4.4%
LCG	Const	10.7	0.90%	1.5	84	0.3	766	14.0	0.8	2.1%	5.7%
SZC	IP	35.4	0.40%	1.1	258	0.9	1,549	22.8	2.1	3.2%	12.1%
SIP	IP	73.2	0.80%	1.5	625	1.6	5,931	12.3	3.4	2.0%	29.0%
PHR	IP	58.0	0.30%	1.0	319	0.2	3,028	19.2	2.1	18.5%	12.1%
DIG	RE	21.7	-0.90%	1.8	537	4.2	151	143.7	1.7	4.7%	1.1%
CEO	RE	15.1	-1.30%	2.0	331	1.4	318	47.4	1.3	4.8%	2.1%
KBC	IP	25.4	0.00%	1.4	791	1.8	300	84.7	1.1	20.5%	1.7%
VGC	IP	41.4	-0.60%	1.2	752	0.7	1,776	23.3	2.3	4.7%	8.2%
GVR	IP	34.6	1.30%	1.5	5,604	3.0	693	49.8	2.7	0.5%	6.5%
NKG	Material	21.2	-0.90%	1.6	226	2.2	1,580	13.4	1.0	13.1%	7.4%
BMP	Material	109.0	0.20%	1.2	362	1.5	11,420	9.5	3.4	82.6%	34.6%
IJC	RE	13.9	1.10%	1.4	213	0.7	683	20.3	1.0	4.6%	6.0%
DXG	RE	14.6	-2.00%	1.6	427	2.9	249	58.7	1.0	15.4%	1.9%
VRE	RE	19.0	-0.50%	1.3	1,751	2.5	1,975	9.6	1.1	22.2%	11.9%
PDR	RE	21.2	0.00%	1.7	749	3.5	557	38.0	1.7	6.4%	5.0%
DIG	RE	21.7	-0.90%	1.8	537	4.2	151	143.7	1.7	4.7%	1.1%
HUT	Const	16.5	0.00%	1.1	597	0.4	64	260.0	1.7	1.5%	1.7%
C4G	Const	8.8	-1.10%	1.3	-	0.1	503	17.5	0.8	0.0%	4.8%
CSV	Chemicals	39.2	2.20%	1.8	176	7.0	4,748	8.3	1.2	3.8%	15.2%
DHC	Chemicals	37.1	-0.30%	1.1	121	0.1	3,067	12.1	1.6	39.2%	13.3%
DRC	Tyre	32.4	0.80%	0.8	156	0.3	2,509	12.9	2.1	11.7%	16.5%
PC1	Utlilities	29.0	0.50%	1.2	366	2.2	1,203	24.1	1.7	13.8%	6.1%
HDG	Utlilities	27.7	-0.20%	1.3	378	1.9	1,958	14.1	1.5	15.7%	11.8%
GEX	Utlilities	20.8	0.20%	1.6	725	1.7	1,245	16.7	1.3	8.3%	7.0%
QTP	Utlilities	14.1	-0.70%	0.6	-	0.0	1,357	10.4	1.2	1.2%	11.2%
PLX	O&G	45.4	-0.90%	0.9	2,339	2.3	2,879	15.8	2.3	18.2%	13.8%
BSR	O&G	23.4	0.40%	1.0	-	3.4	2,408	9.7	1.2	0.7%	13.4%
PLC	O&G	24.9	-1.60%	1.5	82	0.1	734	33.9	1.6	0.5%	4.7%
ANV	Fishery	31.8	-0.30%	1.4	172	0.4	114	280.1	1.5	1.0%	1.2%
PTB	Material	62.2	0.50%	0.7	169	0.1	4,899	12.7	1.5	24.9%	11.9%
VSC	Logistics	16.8	0.60%	1.3	195	1.0	713	23.6	1.0	3.1%	7.3%
HAH	Logistics	39.0	0.00%	1.2	192	1.5	2,800	13.9	1.7	7.7%	10.6%
VTP	Logistics	73.6	0.10%	1.5	364	1.5	2,893	25.4	5.6	6.9%	22.8%
DBC	Retail	29.2	0.30%	1.6	397	6.5	979	29.9	1.4	12.1%	5.0%
FRT	Retail	178.9	-0.90%	0.6	988	3.7	(414)	-431.7	14.6	36.1%	11.8%
QNS	Retail	47.1	0.00%	0.6	-	0.4	6,678	7.1	1.9	13.8%	28.7%
TNG	Textile	26.2	-0.80%	1.2	130	1.1	2,254	11.6	1.6	19.5%	14.7%
PVT	Logistics	28.0	0.70%	0.9	404	1.0	2,805	10.0	1.4	13.2%	14.2%
DPM	Fertilizer	35.2	0.90%	1.2	559	4.4	1,703	20.7	1.2	8.8%	5.5%
REE	Utlilities	65.7	0.90%	1.1	1,255	0.7	3,804	17.3	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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