

STOCK MARKET

VN-Index continued to trade around 1,245 today and closed at 1,245.06 points, almost flat compared to yesterday. Market breadth was negative with 14/18 sectors losing points, of which Oil and Gas led the decline. On the other hand, Retail and Banking sectors had a positive trading session. Regarding foreign investors, today they were net sellers on both HSX and HNX. The tug-of-war trend around the resistance level of 1,245 has not shown any signs of ending.

FUTURES CONTRACTS

Futures contracts all increased according to the movement of VN30.

COVERED WARRANTS

During the trading session on 31/07/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

BSC30, BSC50 PERFORMANCE

- VN-Index **+6.45** points, closing at **1251.51** points. HNX-Index **-0.51** points, closing at **235.36** points.
- Pulling the index up: **VCB (+2.35)**, **VNM (+2.09)**, **GAS (+1.56)**, **BID (+1.13)**, **VPB (+0.89)**.
- Pulling the index down: **HPG (-1.06)**, **HVN (-0.78)**, **PLX (-0.36)**, **GVR (-0.24)**, **LPB (-0.22)**.
- The matched trade value of VN-Index reached VND **15,277** billion, increased **21.62%** compared to the previous session. The total transaction value reached VND 17,528 billion.
- The trading range is 9.47 points. The market had **206** gainers, 68 remaining unchanged, **224** losers.
- Foreign investors' net selling value: VND **-611.96** billion on HOSE, including **VIC (VND -906.26 billion)**, **HSG (VND -57.71 billion)**, **CTG (VND -57.69 billion)**, **TCB (VND -43.57 billion)**, **HVN (VND -32.78 billion)**. Foreign investors were net sellers on HNX with the value of VND **-27.83** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.08%**. Positive stocks: **VNM(+5.76%)**, **GAS(+3.50%)**, **VPB(+2.43%)**.
- BSC50 **+0.05%**. Positive stocks: **BSR (+5.56%)**, **HDB (+3.95%)**, **VIB(+2.91%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.08%	0.05%	0.52%	0.88%
1 week	0.82%	0.33%	0.53%	0.57%
1 months	-2.82%	-2.34%	-2.38%	-1.90%
3 months	3.11%	2.33%	1.60%	1.87%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,251.51	235.36	95.07
% 1D	0.52%	-0.22%	-0.18%
TV (bil VND)	15,277	943	935
%1D	21.62%	-4.80%	34.86%
Foreign (bil VND)	-611.96	-27.83	3.65

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VNM	369.90	VIC	-906.26
MWG	100.56	HSG	-57.71
FPT	86.03	CTG	-57.69
VPB	50.36	TCB	-43.57
HDB	36.30	HVN	-32.78

Overview of global stock markets

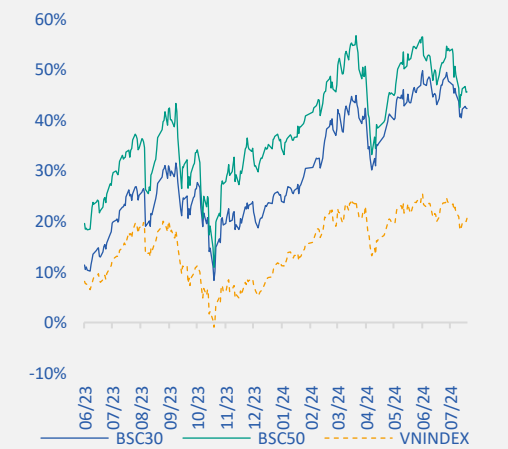
		%D	%W
SPX	5,436	-0.50%	-2.15%
FTSE100	8,390	1.40%	2.90%
Eurostoxx	4,886	0.72%	0.39%
Shanghai	2,939	2.06%	1.27%
Nikkei	39,123	1.59%	-0.01%

Source: Bloomberg

	Close	%
Commodities		
Brent	80	1.95%
Gold	2,467	2.59%
Exchange rate		
USD/VND	25,455	-0.02%
EUR/VND	28,114	0.01%
JPY/VND	166	0.77%
Interest rates		
10Y-Gov bond rate	2.82%	
1M-interbank rate	4.73%	

Source: BSC Research

Performances of BSC30, BSC50



Source: BSC Research

Contents

Market outlook	Page 1
Market statistics	Page 2
BSC30	Page 3
BSC50	Page 4
Disclaimer	Page 5

MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
VCB	89.20	1.94%	2.35	5.59
VNM	71.60	5.76%	2.09	2.09
GAS	79.90	3.50%	1.56	2.30
BID	47.60	1.71%	1.13	5.70
VPB	19.00	2.43%	0.89	7.93

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
KSV	43.50	9.85%	0.62	0.20
VIF	17.10	3.01%	0.13	0.35
PVI	53.70	1.32%	0.12	0.23
DNP	21.00	6.60%	0.12	0.12
CEO	15.40	1.99%	0.11	0.51

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
VNG	9.04	6.98%	0.01	0.05
BMC	19.25	6.94%	0.00	0.34
CRC	6.94	6.93%	0.01	0.27
ST8	8.08	6.88%	0.00	0.51
DLG	1.73	6.79%	0.01	1.52

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
KSV	75.80	9.86%	0.21	0.00
GLT	43.50	9.85%	3.24	0.39
NFC	35.80	9.82%	0.12	0.00
VCM	18.10	9.70%	0.10	0.00
HAD	14.80	9.63%	0.02	0.00

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
HPG	27.20	-2.51%	-1.06	6.40
HVN	21.25	-6.80%	-0.78	2.21
PLX	45.90	-2.55%	-0.36	1.27
GVR	33.00	-0.75%	-0.24	4.00
LPB	29.15	-1.19%	-0.22	2.56

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
DTK	13.30	-6.99%	-0.46	0.68
VCS	67.30	-2.46%	-0.19	0.16
SHS	16.20	-1.22%	-0.12	0.81
NTP	61.40	-1.76%	-0.10	0.13
VGS	34.40	-6.01%	-0.08	0.05

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
TCO	6.83	-6.95%	-0.01	4.28
TMT	9.54	-6.93%	-0.01	0.05
SVC	26.90	-6.92%	-0.03	0.00
HBC	5.85	-6.85%	-0.03	15.18
HVN	21.25	-6.80%	-0.78	6.47

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
KST	12.60	-9.35%	-0.03	0.01
MEL	6.30	-8.70%	-0.03	0.00
HMH	12.70	-8.63%	-0.05	0.00
VHL	10.90	-8.40%	-0.09	0.00
CTB	20.70	-8.00%	-0.09	0.00

Figure 1  
HSX-Index Intraday

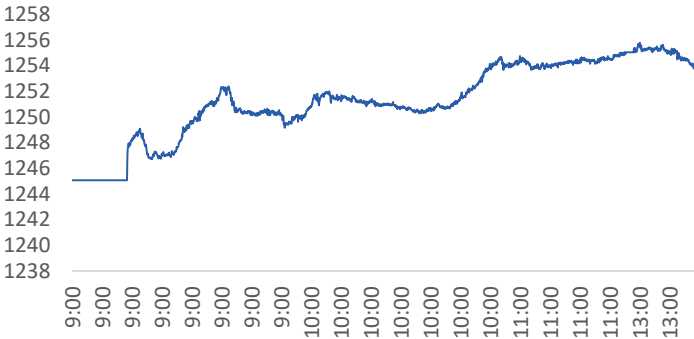


Figure 2  
HNX-Index Intraday

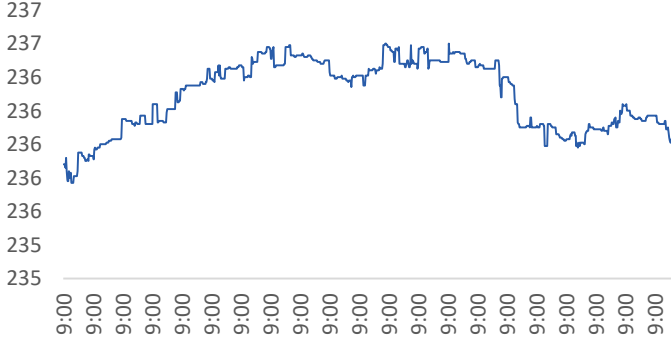


Figure 3  
Proprietary trading

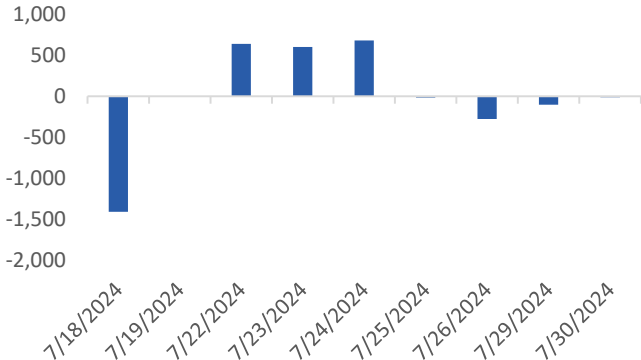
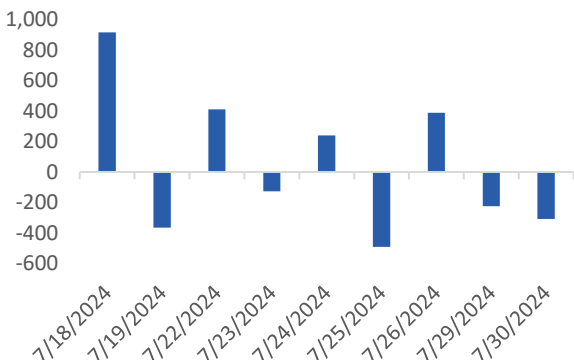


Figure 4  
Foreign transactions



Source: FiinProX, BSC Research

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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	89.2	1.90%	0.6	19,725	6.6	5,838	15.3	105,000	23.2%	<a href="#">Link</a>
BID	Bank	47.6	1.70%	1.1	10,736	6.0	4,006	11.9	54,578	17.2%	<a href="#">Link</a>
VPB	Bank	19.0	2.40%	1.0	5,964	26.3	1,397	13.6	23,685	26.7%	<a href="#">Link</a>
TCB	Bank	23.2	1.30%	1.1	6,481	10.1	3,047	7.6	-	21.8%	<a href="#">Link</a>
MBB	Bank	24.4	-0.40%	1.0	5,123	19.7	3,818	6.4	24,400	23.2%	<a href="#">Link</a>
STB	Bank	29.0	0.30%	1.1	2,163	6.9	4,206	6.9	31,200	23.2%	<a href="#">Link</a>
CTG	Bank	32.0	0.00%	1.3	6,799	8.3	3,751	8.5	19,100	26.1%	<a href="#">Link</a>
ACB	Bank	24.6	1.70%	0.8	4,338	8.3	3,676	6.7	42,500	30.0%	<a href="#">Link</a>
SSI	Broker	31.8	-0.50%	1.2	1,899	9.9	1,882	16.9	45,900	42.6%	<a href="#">Link</a>
IDC	IP	59.0	0.20%	1.2	770	3.1	5,880	10.0	-	24.1%	<a href="#">Link</a>
HPG	Material	27.2	-2.50%	1.2	6,883	26.1	1,601	17.0	23,300	24.4%	<a href="#">Link</a>
HSG	Material	21.8	-4.80%	1.7	531	24.0	1,844	11.8	79,900	20.4%	<a href="#">Link</a>
VHM	RE	36.7	0.00%	1.0	6,323	5.4	5,326	6.9	38,900	15.7%	<a href="#">Link</a>
KDH	RE	36.2	0.70%	1.3	1,146	2.1	726	50.0	44,100	39.6%	<a href="#">Link</a>
NLG	RE	41.2	-1.60%	1.3	626	1.3	1,102	37.3	46,100	49.4%	<a href="#">Link</a>
DGC	Chemicals	112.0	-0.40%	1.5	1,683	6.0	7,849	14.3	85,000	18.9%	<a href="#">Link</a>
DCM	Fertilizer	37.1	-1.60%	1.3	777	5.4	2,798	13.3	41,000	8.5%	<a href="#">Link</a>
GAS	O&G	79.9	3.50%	0.6	7,260	10.1	4,688	17.0	36,000	1.9%	<a href="#">Link</a>
PVS	O&G	40.6	-0.20%	1.1	768	3.9	1,931	21.0	110,500	21.6%	<a href="#">Link</a>
PVD	O&G	27.7	1.10%	1.3	609	2.5	1,200	23.1	45,000	16.2%	<a href="#">Link</a>
POW	Utilities	13.4	0.40%	0.7	1,246	3.4	467	28.8	38,500	4.0%	<a href="#">Link</a>
VHC	Fishery	71.2	0.30%	1.2	632	0.7	3,216	22.1	29,000	29.6%	<a href="#">Link</a>
GMD	Logistics	80.0	1.30%	0.9	983	2.5	8,430	9.5	14,500	48.1%	<a href="#">Link</a>
VNM	Retail	71.6	5.80%	0.6	5,920	59.9	4,408	16.2	81,700	50.1%	<a href="#">Link</a>
MSN	Retail	74.1	-0.70%	1.2	4,436	10.5	466	158.9	27,700	28.5%	<a href="#">Link</a>
MWG	Retail	63.8	1.30%	1.3	3,690	26.1	717	89.0	63,800	46.8%	<a href="#">Link</a>
PNJ	Retail	97.1	0.20%	0.9	1,285	2.9	6,133	15.8	83,500	49.0%	<a href="#">Link</a>
DGW	Retail	59.4	-0.70%	1.7	393	2.8	2,200	27.0	90,900	24.4%	<a href="#">Link</a>
FPT	Tech	128.6	0.50%	1.0	7,431	14.6	4,889	26.3	57,000	45.2%	<a href="#">Link</a>
CTR	Tech	126.0	-3.40%	1.4	570	2.0	4,582	27.5	108,000	10.4%	<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	26.3	4.00%	0.9	3,031	9.4	3,809	6.9	1.7	18.2%	25.4%
VIB	Bank	21.2	2.90%	1.1	2,128	4.5	3,315	6.4	1.4	20.5%	24.3%
TPB	Bank	18.2	0.80%	1.2	1,581	15.5	2,050	8.9	1.2	28.4%	13.7%
MSB	Bank	14.6	0.00%	1.1	1,159	4.1	2,310	6.3	0.9	29.4%	16.0%
EIB	Bank	18.2	-0.30%	1.0	1,254	2.9	1,147	15.9	1.4	2.9%	10.1%
HCM	Broker	25.4	-1.00%	1.6	706	2.9	1,397	18.1	1.7	45.1%	8.3%
VCI	Broker	44.5	0.00%	1.7	778	2.7	1,763	25.2	2.2	19.2%	7.1%
VND	Broker	15.6	0.30%	1.5	937	3.0	1,591	9.8	1.4	12.6%	13.1%
BSI	Broker	43.0	0.80%	1.8	380	0.6	2,165	19.9	1.8	39.9%	9.0%
SHS	Broker	16.2	-1.20%	1.7	521	3.9	1,338	12.1	1.2	9.0%	5.7%
CTD	Const	65.0	-3.30%	1.2	257	3.0	2,709	24.0	0.8	47.1%	2.3%
HHV	Const	11.2	0.90%	1.5	192	0.8	833	13.5	0.5	8.2%	4.2%
LCG	Const	11.1	0.50%	1.6	85	0.6	655	16.9	0.8	2.3%	4.6%
SZC	IP	38.4	0.40%	1.2	274	0.9	1,549	24.8	2.3	3.1%	13.4%
SIP	IP	74.8	-3.50%	1.3	619	3.3	5,701	13.1	3.5	1.6%	26.9%
PHR	IP	57.1	-0.30%	1.1	306	0.3	3,028	18.9	2.0	18.4%	18.3%
DIG	RE	24.4	0.60%	1.7	590	6.5	152	161.2	2.0	4.2%	2.1%
CEO	RE	15.4	2.00%	1.3	329	2.4	312	49.4	1.3	4.8%	2.4%
KBC	IP	27.3	0.00%	1.5	829	4.0	1,262	21.6	1.2	20.4%	11.7%
VGC	IP	45.2	-4.00%	1.2	803	2.0	1,776	25.5	2.5	5.1%	12.5%
GVR	IP	33.0	-0.80%	1.5	5,223	3.7	628	52.6	2.6	0.5%	6.2%
NKG	Material	22.6	-3.80%	1.6	235	5.8	1,222	18.5	1.1	15.4%	2.3%
BMP	Material	96.8	1.10%	1.0	314	0.5	11,420	8.5	3.0	83.3%	39.1%
IJC	RE	14.8	-1.30%	1.5	220	1.7	683	21.6	1.1	4.6%	10.3%
DXG	RE	13.8	1.10%	1.5	395	2.1	249	55.6	0.9	17.8%	1.1%
VRE	RE	18.6	-0.80%	1.2	1,672	5.1	1,975	9.4	1.1	22.9%	12.4%
PDR	RE	19.0	0.00%	1.6	656	5.0	557	34.1	1.5	8.0%	7.2%
DIG	RE	24.4	0.60%	1.7	590	6.5	152	161.2	2.0	4.2%	2.1%
HUT	Const	16.8	0.60%	1.3	593	0.7	73	229.9	1.5	1.5%	0.7%
C4G	Const	9.4	0.00%	1.4	-	0.1	507	18.5	0.9	0.0%	4.9%
CSV	Chemicals	37.6	-3.60%	1.8	164	1.7	4,797	7.8	1.1	5.3%	16.1%
DHC	Chemicals	39.1	0.00%	1.2	124	0.3	3,461	11.3	1.7	39.8%	17.2%
DRC	Tyre	34.9	-0.30%	0.8	164	0.7	2,510	13.9	2.2	11.9%	13.2%
PC1	Utilities	28.9	-0.30%	1.4	356	4.4	651	44.4	1.7	12.1%	4.1%
HDG	Utilities	28.0	-0.90%	1.3	373	3.4	2,061	13.6	1.4	15.6%	12.9%
GEX	Utilities	22.8	0.00%	1.7	766	10.3	625	36.4	1.6	8.8%	4.1%
QTP	Utilities	15.0	-1.30%	0.6	-	0.2	1,354	11.1	1.2	1.3%	10.8%
PLX	O&G	45.9	-2.50%	1.0	2,307	5.8	2,570	17.9	2.2	17.8%	10.7%
BSR	O&G	22.8	5.60%	1.2	-	14.8	2,588	8.8	1.2	0.7%	15.6%
PLC	O&G	26.1	-0.80%	1.5	83	0.3	1,112	23.5	1.6	0.3%	8.4%
ANV	Fishery	33.9	0.00%	1.4	179	1.3	262	129.2	1.6	1.1%	1.5%
PTB	Material	68.3	-1.00%	0.7	181	0.4	4,765	14.3	1.7	25.0%	10.6%
VSC	Logistics	20.0	-0.20%	1.5	211	1.5	532	37.6	1.8	2.5%	6.2%
HAH	Logistics	42.4	-2.10%	1.3	204	6.0	2,791	15.2	1.8	9.0%	12.1%
VTP	Logistics	74.5	-3.20%	1.5	359	2.1	2,980	25.0	5.6	6.9%	25.6%
DBC	Retail	25.6	-1.50%	1.7	328	4.0	1,729	14.8	1.3	11.9%	0.5%
FRT	Retail	172.8	2.10%	0.8	932	2.7	(2,215)	-78.0	14.0	36.0%	11.8%
QNS	Retail	48.8	0.00%	0.6	-	0.3	6,737	7.2	2.0	15.0%	27.3%
TNG	Textile	25.8	-0.40%	1.2	125	2.6	2,240	11.5	1.6	19.1%	12.5%
PVT	Logistics	28.4	-1.90%	1.1	401	1.3	2,802	10.2	1.4	14.0%	14.3%
DPM	Fertilizer	35.3	-0.40%	1.3	547	2.1	1,372	25.7	1.2	8.1%	4.2%
REE	Utilities	69.6	-1.30%	1.0	1,297	5.6	4,706	14.8	1.7	49.0%	13.9%

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

The information, statements, forecasts and projections contained herein, including any expression of opinion, are based upon sources believed to be reliable but their accuracy completeness or correctness are not guaranteed. Expressions of opinion herein were arrived at after due and careful consideration and they were based upon the best information then known to us, and in our opinion are fair and reasonable in the circumstances prevailing at the time. Expressions of opinion contained herein are subject to change without notice. This document is not, and should not be construed as, an offer or the solicitation of an offer to buy or sell any securities. BSC and other companies in the BSC and/or their officers, directors and employees may have positions and may affect transactions in securities of companies mentioned herein and may also perform or seek to perform investment banking services for these companies. This document is for private circulation only and is not for publication in the press or elsewhere. BSC accepts no liability whatsoever for any direct or consequential loss arising from any use of this or its content. The use of any information, statements forecasts and projections contained herein shall be at the sole discretion and risk of the user. No part of this material may be (i) copied, photocopied or duplicated in any form by any mean or (ii) redistributed without the prior written consent of BIDV Securities Company (BSC).

BSC Research

Trần Thăng Long

Head of BSC Research

[longtt@bsc.com.vn](mailto:longtt@bsc.com.vn)

Macro & Market team

Bùi Nguyên Khoa

Leader of Macro - Market team

[khoabn@bsc.com.vn](mailto:khoabn@bsc.com.vn)

Vũ Việt Anh

Macro - Market analyst

[anhvv@bsc.com.vn](mailto:anhvv@bsc.com.vn)

Trần Thanh Tùng

Macro - Market analyst

[tungtt@bsc.com.vn](mailto:tungtt@bsc.com.vn)

Phạm Thanh Thảo

Macro - Market analyst

[thaopt1@bsc.com.vn](mailto:thaopt1@bsc.com.vn)

Nguyễn Giang Anh

Macro - Market analyst

[anhng@bsc.com.vn](mailto:anhng@bsc.com.vn)

Contact Info

Website

<http://www.bsc.com.vn>

Ho Chi Minh City Office

4th, 9th Floor, President Place Tower, 93 Nguyen Cong Tru Street, I District, Ho Chi Minh City, Vietnam.

Tel: (028) 3821 8885

Fax: (028) 3821 8879

BSC Headquarters

8th, 9th floor, ThaiHoldings Tower, 210 Tran Quang Khai street, Hanoi, Vietnam

Tel: (024) 3935 2722

Fax: (024) 2220 0669

For BSC Research

BSC Research Department

[hn.ptnc@bsc.com.vn](mailto:hn.ptnc@bsc.com.vn)

(+84) 39352722 - Ext 108

For Institutional Clients

Investment Consulting and Brokerage

[hn.tvdt.khtc@bsc.com.vn](mailto:hn.tvdt.khtc@bsc.com.vn)

(024) 39264 659

For Individual Clients

i-Center

[i-center@bsc.com.vn](mailto:i-center@bsc.com.vn)

(024) 39264 660