

STOCK MARKET

VN-Index ended the session slightly down 0.93 points, closing at 1,279.82 points. Market breadth is quite struggling with 10/18 industries increasing, in which Communications, Oil and Gas, Healthcare... lead the increase. On the contrary, the Information Technology, Retail, Travel and Entertainment industries... led the decline. Regarding foreign transactions, today they turned to net selling on HNX and continued to sell at a large value on HSX. From a technical perspective, the threshold of 1,280 points continues to be tested. In the next developments, the struggling state of VN-Index will likely continue and 1,275 - 1,280 points will be an area that needs careful observation. .

FUTURES CONTRACTS

Futures contracts all decreased according to the movement of VN30, VN30F2408 fluctuated in opposite directions.

COVERED WARRANTS

During the trading session on 15/07/2024, warrants fluctuated according to the struggling movement of the underlying stocks.

BSC30, BSC50 PERFORMANCE

- VN-Index **-0.93** points, closing at **1279.82** points. HNX-Index **-0.18** points, closing at **244.84** points.
- Pulling the index up: **GVR (+0.59)**, **BCM (+0.57)**, **PLX (+0.55)**, **VJC (+0.30)**, **HDB (+0.18)**.
- Pulling the index down: **VHM (-0.53)**, **HVN (-0.45)**, **FPT (-0.39)**, **VPB (-0.38)**, **VIC (-0.37)**.
- The matched trade value of VN-Index reached VND **11,279** billion, decreased **-17.93%** compared to the previous session. The total transaction value reached VND 14,209 billion.
- The trading range is 10.1 points. The market had **167** gainers, 86 remaining unchanged, **262** losers.
- Foreign investors' net selling value: VND **-1674.48** billion on HOSE, including **HDB (VND -406.16 billion)**, **STB (VND -327.07 billion)**, **SAB (VND -179.12 billion)**, **SCS (VND -118.86 billion)**, **VCB (VND -95.82 billion)**. Foreign investors were net sellers on HNX with the value of VND **-43.13** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.19%**. Positive stocks: **VHC (+2.19%)**, **DCM (+1.53%)**, **POW (+0.66%)**.
- BSC50 **-0.68%**. Positive stocks: **NKG (+2.80%)**, **GVR (+2.57%)**, **BSR (+2.14%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	-0.19%	-0.68%	-0.24%	-0.34%
1 week	-0.14%	1.89%	0.06%	-0.76%
1 months	3.40%	2.67%	3.03%	2.96%
3 months	9.91%	10.36%	6.00%	7.06%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Closed	1,279.82	244.84	97.92
% 1D	-0.07%	-0.07%	-0.22%
TV (bil VND)	11,279	1,045	841
%1D	-17.93%	1.41%	-13.31%
Foreign (bil VND)	-1674.48	-43.13	-194.61

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
TNH	109.08	HDB	-406.16
NLG	76.94	STB	-327.07
PC1	48.90	SAB	-179.12
PLX	27.05	SCS	-118.86
BCM	14.34	VCB	-95.82

Overview of global stock markets

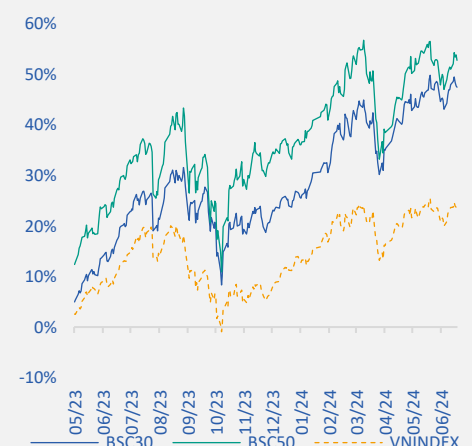
		%D	%W
SPX	5,615	0.55%	0.87%
FTSE100	8,250	-0.03%	0.69%
Eurostoxx	5,029	-0.32%	1.17%
Shanghai	2,974	0.09%	1.76%
Nikkei	41,191	-2.57%	0.73%

Source: Bloomberg

	Close	%
Commodities		
Brent	85	-0.13%
Gold	2,408	-0.24%
Exchange rate		
USD/VND	25,457	-0.01%
EUR/VND	28,439	0.05%
JPY/VND	161	2.13%

Interst rates		
10Y-Gov bond rate	2.83%	-0.06%
1M-interbank rate	4.63%	

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)
GVR	38.50	1.58%	0.59	4.00
BCM	67.20	3.38%	0.57	1.04
PLX	48.00	3.67%	0.55	1.27
VJC	104.20	2.16%	0.30	0.54
HDB	24.40	1.04%	0.18	2.91

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
DHT	66.50	9.92%	0.39	0.08
TIG	16.80	7.69%	0.18	0.19
PVS	43.00	0.70%	0.10	0.48
DP3	68.80	8.86%	0.09	0.02
VIF	19.50	1.04%	0.05	0.35

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
IMP	87.30	6.99%	0.11	0.29
LBM	60.90	6.84%	0.02	0.33
VDP	40.50	6.58%	0.01	0.01
YEG	10.55	6.57%	0.02	3.50
TDC	10.95	6.31%	0.02	1.75

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
PBP	66.50	9.92%	2.03	0.28
TMX	14.60	9.77%	0.03	0.18
THS	10.20	9.68%	0.02	0.00
HAT	12.50	9.65%	0.01	0.00
KDM	46.60	9.65%	0.05	0.00

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
VHM	38.00	-1.30%	-0.53	4.35
HVN	33.60	-2.47%	-0.45	2.21
FPT	132.70	-0.82%	-0.39	1.46
VPB	18.80	-1.05%	-0.38	7.93
VIC	41.35	-0.96%	-0.37	3.82

Top 5 laggards on the HNX

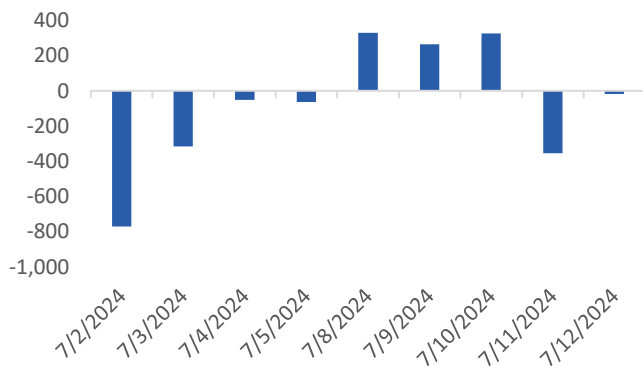
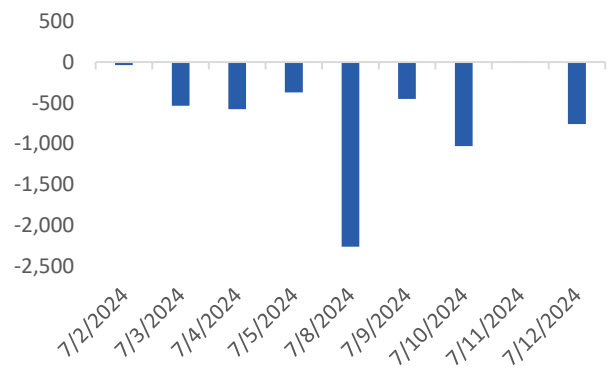
	Close	%	Index pt	Volume (mil)
IDC	60.00	-1.96%	-0.28	0.33
PVI	55.80	-1.76%	-0.17	0.23
VCS	74.70	-0.93%	-0.08	0.16
CEO	17.40	-1.14%	-0.07	0.51
BAB	12.10	-0.82%	-0.06	0.90

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
FDC	14.25	-6.86%	-0.01	0.05
ITD	16.35	-6.84%	-0.01	0.25
SFC	20.35	-6.65%	0.00	0.00
RDP	4.25	-6.39%	0.00	0.26
QCG	11.25	-6.25%	-0.05	1.26

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
KST	13.60	-9.93%	-0.03	0.00
GLT	33.00	-8.84%	-0.10	0.01
ALT	13.60	-8.72%	-0.03	0.00
SAF	49.50	-8.67%	-0.19	0.00
PPE	11.00	-7.56%	-0.01	0.01

Figure 1
Proprietary trading

Figure 2
Foreign transactions


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	87.5	-0.10%	0.6	19,239	4.0	5,838	15.0	105,000	23.2%	Link
BID	Bank	46.6	-0.10%	1.1	10,439	2.2	3,841	12.1	54,578	17.2%	Link
VPB	Bank	18.8	-1.10%	1.0	5,868	11.9	1,397	13.5	23,685	26.7%	Link
TCB	Bank	22.6	-0.70%	1.1	6,277	5.4	5,600	4.0	-	21.8%	Link
MBB	Bank	23.0	0.20%	1.0	4,812	4.0	3,818	6.0	24,400	23.2%	Link
STB	Bank	29.8	0.00%	1.1	2,206	4.3	4,206	7.1	31,200	23.2%	Link
CTG	Bank	32.1	0.30%	1.3	6,781	3.1	3,751	8.6	19,100	26.1%	Link
ACB	Bank	24.0	-0.20%	0.8	4,208	4.2	4,072	5.9	42,500	30.0%	Link
SSI	Securities	34.3	-0.40%	1.2	2,036	5.3	1,704	20.1	45,900	42.6%	Link
IDC	IP	60.1	-1.80%	1.2	780	3.0	5,880	10.2	-	24.1%	Link
HPG	Material	28.4	-0.20%	1.2	7,159	18.2	1,601	17.8	23,300	24.4%	Link
HSG	Material	24.6	-1.40%	1.7	595	7.2	1,423	17.2	79,900	20.4%	Link
VHM	Real estate	38.0	-1.30%	1.0	6,509	7.3	5,074	7.5	38,900	15.7%	Link
KDH	Real estate	37.8	-0.50%	1.4	1,189	5.3	726	52.1	44,100	39.6%	Link
NLG	Real estate	43.8	1.90%	1.3	663	3.8	1,040	42.1	46,100	49.4%	Link
DGC	Chemicals	125.4	-0.10%	1.4	1,874	8.4	7,845	16.0	85,000	18.9%	Link
DCM	Fertilizer	39.4	-1.00%	1.3	820	6.5	2,313	17.0	41,000	8.5%	Link
GAS	O&G	78.3	0.40%	0.6	7,074	3.7	4,688	16.7	36,000	1.9%	Link
PVS	O&G	42.7	0.00%	1.1	803	1.2	1,992	21.4	110,500	21.6%	Link
PVD	O&G	29.8	-0.30%	1.3	651	2.8	1,200	24.8	45,000	16.2%	Link
POW	Utilities	15.2	0.00%	0.7	1,400	5.5	350	43.5	38,500	4.0%	Link
VHC	Fishery	74.5	-0.40%	1.1	658	1.1	3,774	19.7	29,000	29.6%	Link
GMD	Logistics	81.3	-3.20%	0.8	993	2.7	8,430	9.6	14,500	48.1%	Link
VNM	Retail	66.2	-0.20%	0.6	5,443	5.6	4,408	15.0	81,700	50.1%	Link
MSN	Retail	74.5	-0.40%	1.3	4,434	8.5	215	345.9	27,700	28.5%	Link
MWG	Retail	64.3	-0.80%	1.3	3,698	9.3	717	89.7	63,800	46.8%	Link
PNJ	Retail	97.7	0.00%	0.9	1,286	3.6	5,860	16.7	83,500	49.0%	Link
DGW	Retail	64.8	-0.20%	1.7	426	2.2	2,200	29.5	90,900	24.4%	Link
FPT	Technology	132.7	-0.80%	1.0	7,624	16.0	5,335	24.9	57,000	45.2%	Link
CTR	Technology	145.5	-1.10%	1.3	655	1.0	4,582	31.8	108,000	10.4%	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	24.4	1.00%	0.9	2,796	8.2	3,809	6.4	1.6	18.2%	25.4%
VIB	Bank	21.3	0.00%	1.1	2,126	1.2	3,315	6.4	1.4	20.5%	24.3%
TPB	Bank	17.6	-1.70%	1.2	1,529	2.0	2,050	8.6	1.1	28.4%	13.7%
MSB	Bank	14.6	1.00%	1.2	1,149	2.2	2,310	6.3	0.9	29.4%	16.0%
EIB	Bank	19.0	0.00%	1.0	1,298	2.2	1,147	16.5	1.4	2.9%	10.1%
HCM	Securities	26.5	-4.70%	1.6	734	3.5	1,175	22.5	2.2	45.1%	8.3%
VCI	Securities	48.0	0.30%	1.7	835	3.4	1,409	34.1	2.6	19.2%	7.1%
VND	Securities	16.2	-1.50%	1.5	970	6.6	2,057	7.9	1.2	12.6%	13.1%
BID	Bank	46.6	-0.10%	1.1	10,439	2.2	3,841	12.1	2.2	17.2%	20.3%
SHS	Securities	17.5	0.00%	1.7	560	2.0	1,076	16.3	1.3	9.0%	5.7%
LCG	Construction	11.6	0.40%	1.6	88	0.4	655	17.6	0.9	2.3%	4.6%
HUT	Construction	17.5	-1.10%	1.3	614	0.4	73	239.5	1.6	1.5%	0.7%
CTD	Construction	73.1	-0.70%	1.1	287	1.6	2,709	27.0	0.9	47.1%	2.3%
HHV	Construction	12.4	-0.80%	1.5	202	0.7	833	14.9	0.6	8.2%	4.2%
C4G	Construction	9.8	-1.00%	1.3	-	0.1	433	22.6	0.9	0.0%	4.9%
DIG	IP	26.6	-0.60%	1.7	637	6.0	(38)	-691.6	2.2	4.2%	2.1%
CEO	IP	17.3	-1.70%	1.3	350	1.9	312	55.5	1.5	4.8%	2.4%
KBC	IP	28.2	-1.20%	1.5	853	4.0	1,262	22.4	1.2	20.4%	11.7%
VGC	IP	52.4	-0.40%	1.2	924	0.4	2,746	19.1	2.9	5.1%	12.5%
SZC	IP	39.8	-0.70%	1.2	281	1.1	1,515	26.2	2.4	3.1%	13.4%
SIP	IP	82.8	1.70%	1.4	681	1.0	5,701	14.5	3.9	1.6%	26.9%
PHR	IP	61.8	0.80%	1.0	329	0.4	3,448	17.9	2.2	18.4%	18.3%
GVR	IP	38.5	1.60%	1.5	6,058	7.0	628	61.3	3.0	0.5%	6.2%
NKG	Material	25.7	0.00%	1.6	266	2.6	1,222	21.0	1.2	15.4%	2.3%
BMP	Chemicals	96.2	-1.30%	1.0	310	0.8	11,594	8.3	2.7	83.3%	39.1%
IJC	Real estate	16.0	1.90%	1.5	238	5.6	865	18.5	1.3	4.6%	10.3%
DXG	Real estate	14.3	-1.70%	1.6	405	2.1	420	34.1	1.0	17.8%	1.1%
VRE	Real estate	20.4	-1.90%	1.2	1,819	9.0	1,966	10.4	1.2	22.9%	12.4%
PDR	Real estate	23.2	-0.90%	1.6	795	2.0	964	24.0	1.8	8.0%	7.2%
DIG	Real estate	26.6	-0.60%	1.7	637	6.0	(38)	-691.6	2.2	4.2%	2.1%
DHC	Chemicals	40.5	0.20%	1.1	128	0.2	3,461	11.7	1.7	39.8%	17.2%
PLX	O&G	48.0	3.70%	1.0	2,399	5.1	2,570	18.7	2.3	17.8%	10.7%
PLC	O&G	27.0	-1.50%	1.5	86	0.4	1,112	24.3	1.6	0.3%	8.4%
BSR	O&G	24.2	1.30%	1.2	-	9.8	2,588	9.4	1.3	0.7%	15.6%
DRC	Tyre	36.5	2.00%	0.8	171	1.2	2,286	16.0	2.3	11.9%	13.2%
PC1	Utilities	31.8	3.20%	1.3	389	6.2	651	48.8	1.9	12.1%	4.1%
HDG	Utilities	32.4	3.20%	1.3	429	9.5	2,061	15.7	1.6	15.6%	12.9%
GEX	Utilities	23.5	2.20%	1.7	787	8.3	625	37.6	1.6	8.8%	4.1%
QTP	Utilities	16.6	0.60%	0.5	-	0.6	1,549	10.7	1.4	1.3%	10.8%
REE	Utilities	72.0	1.30%	1.0	1,331	3.5	4,706	15.3	1.7	49.0%	13.9%
ANV	Fishery	35.5	-1.30%	1.4	186	2.4	(252)	-140.6	1.6	1.1%	1.5%
PTB	Fishery	71.1	0.90%	0.7	187	0.3	4,765	14.9	1.8	25.0%	10.6%
PVT	Logistics	30.7	3.00%	1.0	430	3.7	3,150	9.7	1.4	14.0%	14.3%
VSC	Logistics	21.5	-0.50%	1.4	226	1.9	532	40.4	2.0	2.5%	6.2%
HAH	Logistics	45.2	0.70%	1.2	216	4.0	3,081	14.7	1.8	9.0%	12.1%
VTP	Logistics	85.2	-3.10%	1.5	408	4.0	2,980	28.6	6.4	6.9%	25.6%
DBC	Retail	30.2	-11.20%	1.7	288	6.7	1,729	17.5	1.5	11.9%	0.5%
FRT	Retail	173.0	-1.40%	0.7	927	4.6	(2,215)	-78.1	14.0	36.0%	11.8%
QNS	Retail	49.7	0.40%	0.6	-	0.4	6,737	7.4	2.0	15.0%	27.3%
PVT	O&G	30.7	3.00%	1.0	430	3.7	3,150	9.7	1.4	14.0%	14.3%
TNG	Textile	25.5	-0.40%	1.2	123	0.9	1,981	12.9	1.6	19.1%	12.5%

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, Logistic, 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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