

MARKET TREND FOREACAST

	Negative	Neutral	Positive
Day 28/3/2024		●	
Week 25/3-29/3/2024		●	
Month 03/2024		●	

STOCK MARKET:

VN-Index experienced a day of struggling around the 1,280 threshold before closing at 1,283.09 points, almost unchanged from yesterday. Market breadth tilted to the positive side with 13/18 sectors increasing, of which the Retail led the increase today, followed by the Construction and materials. Regarding foreign investors, today they net sold more than 1 trillion dong on the HSX. The accumulation trend may continue in the short term and VN-Index may raise the accumulation zone to 1,280 - 1,300.

FUTURES CONTRACTS:

Futures contracts increased in accordance with the movement of VN30. It is recommended that investors be cautious in the coming sessions.

COVERED WARRANTS:

During the trading session on March 27, 2024, warrants fluctuated according to the struggling trend of the underlying stock.

HIGHLIGHT:

- VN-Index **+0.88** points, closing at **1283.09**. HNX-Index **+0.82** points, closing at **242.85**.
- Pulling the index up: **MWG (+0.76)**, **MSN (+0.5)**, **CTG (+0.4)**, **CTR (+0.23)**, **SAB (+0.19)**.
- Pulling the index down: **BID (-0.69)**, **VCB (-0.68)**, **GVR (-0.48)**, **TCB (-0.34)**, **VHM (-0.26)**.
- The matched value of VN-Index reached VND **19,455** billion, decreased **-2.52%** compared to the previous session. The total transaction value reached VND 24,012 billion.
- The trading range is 9.77 points. The market had **244** advancers, 95 reference stocks, **209** decliners.
- Foreign investors' net selling value: VND **-1962.34** billion on HOSE, including **MSN (VND -1078.20 bil)**, **VIX (VND -177.26 bil)**, **VHM (VND -135.08 bil)**, **GEX (VND -118.83 bil)**, **VNM (VND -71.90 tỷ)**. Foreign investors were net sellers on HNX with the value of VND **-3.99** billion.

BSC30, BSC50 PERFORMANCE:

- BSC30 **+0.53%**. Positive stocks: **CTR (+5.70%)**, **MWG (+4.21%)**, **HSG (+2.55%)**.
- BSC50 **+0.70%**. Positive stocks: **CSV (+6.84%)**, **VSC (+6.80%)**, **PTB (+4.47%)**.

Indices' performances

	BSC30	BSC50	VN Index	VN30 Index
1 day	0.53%	0.70%	0.07%	0.20%
1 week	2.51%	2.82%	1.83%	2.36%
1 months	18.01%	13.46%	2.27%	1.85%
3 months	29.58%	22.80%	12.14%	12.57%

Overview of Vietnam stock market

	VNI	HNX	UPCOM
Điểm	1,283.09	242.85	91.18
% 1D	0.07%	0.34%	-0.02%
GTGD (tỷ VND)	24,012	1,799	759
%1D	-2.52%	-0.60%	47.84%
GDNN (tỷ VND)	-1962.34	-3.99	19.06

Foreign transactions (Bil. VND)

Top buy	Value	Top sell	Value
VSC	45.33	MSN	-1078.20
HSG	32.64	VIX	-177.26
MWG	29.48	VHM	-135.08
TPB	17.92	GEX	-118.83
DBD	17.58	VNM	-71.90

Overview of global stock markets

		%D	%W
SPX	5,204	-0.28%	0.48%
FTSE100	7,931	0.17%	2.49%
Eurostoxx	4,409	0.09%	0.72%
Shanghai	2,993	-1.26%	-2.81%
Nikkei	40,791	0.73%	1.97%

Nguồn: Bloomberg

	Close	%
Commodities		
Brent	84.84	-0.5%
Gold	2,176	0.0%
Exchange rate		
USD/VND	24,950	0.0%
EUR/VND	27,570	-0.2%
JPY/VND	167	-0.6%
Interest rates		
1M-interbank rate	2.59%	-0.1%
10Y-Gov bond rate	0.00%	0.0%

Source: BSC Research

Performances of BSC30, BSC50



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MARKET STATISTICS

Top 5 leaders on the HSX

	Close	%	Index pt	Volume (mil)
MWG	48.65	4.21%	0.76	14.05
MSN	74.00	1.89%	0.50	45.68
CTG	35.20	0.85%	0.40	5.25
CTR	135.00	5.70%	0.23	0.56
SAB	56.90	1.05%	0.19	0.66

Top 5 leaders on the HNX

	Close	%	Index pt	Volume (mil)
PVI	47.90	2.30%	1.03	0.06
VCS	69.50	1.44%	0.64	0.11
TNG	21.90	4.11%	0.42	4.37
IDC	58.50	0.51%	0.39	0.90
BAB	12.50	0.80%	0.35	0.02

Top 5 gainers on the HSX

	Close	%	Index pt	Volume (mil)
VCF	217.50	6.99%	0.11	0.00
VRC	11.50	6.96%	0.01	0.26
SMA	9.12	6.91%	0.00	0.00
CLW	30.50	6.89%	0.01	0.00
QCG	11.65	6.87%	0.06	3.34

Top 5 gainers on the HNX

	Close	%	Index pt	Volume (mil)
DC2	5.00	10.00%	0.02	0.08
PIA	25.00	10.00%	0.04	0.00
TJC	15.20	9.87%	0.06	0.00
HMR	17.70	9.60%	0.04	0.21
VTV	6.40	9.38%	0.08	0.40

Top 5 laggards on the HSX

	Close	%	Index pt	Volume (mil)
BID	53.00	-0.94%	-0.69	1.64
VCB	96.30	-0.52%	-0.68	1.26
GVR	33.90	-1.47%	-0.48	2.58
TCB	45.95	-0.87%	-0.34	5.98
VHM	42.75	-0.58%	-0.26	7.64

Top 5 laggards on the HNX

	Close	%	Index pt	Volume (mil)
KSV	28.70	-2.44%	-0.54	0.01
PRE	18.50	-5.95%	-0.42	0.00
DTK	11.30	-0.88%	-0.27	0.01
NVB	10.80	-0.93%	-0.22	0.35
THD	35.20	-0.28%	-0.15	0.00

Top 5 losers on the HSX

	Close	%	Index pt	Volume (mil)
FUEIP100	7.83	-6.77%	0.00	0.00
NO1	8.47	-6.49%	0.00	0.33
PNC	8.63	-6.14%	0.00	0.00
HU1	5.90	-6.10%	0.00	0.01
CCI	22.80	-4.39%	0.00	0.00

Top 5 losers on the HNX

	Close	%	Index pt	Volume (mil)
KTT	4.40	-9.09%	0.00	0.00
NBW	26.70	-8.99%	-0.09	0.00
KHS	10.60	-7.55%	-0.04	0.00
NHC	35.00	-7.14%	-0.03	0.00
SFN	19.60	-7.14%	-0.01	0.00

Figure 1
HSX-Index Intraday

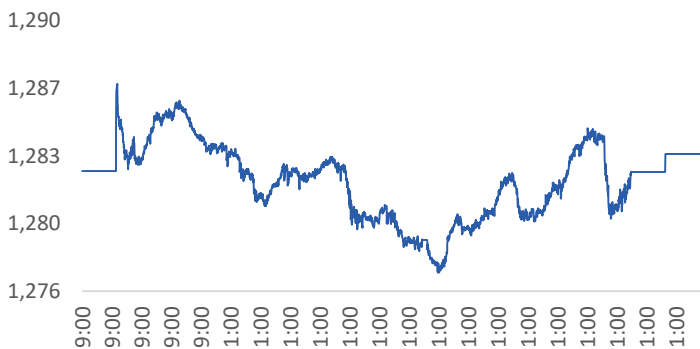


Figure 2
HNX-Index Intraday

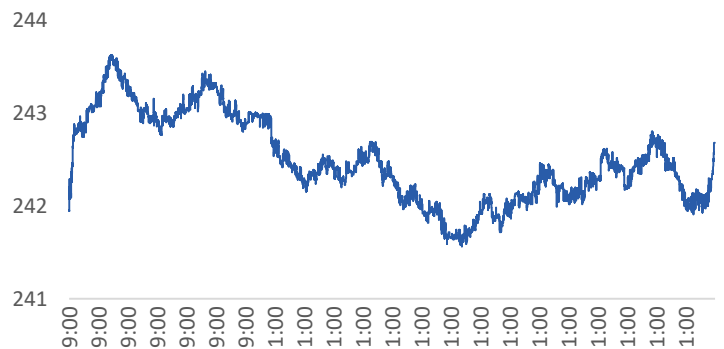


Figure 3
Proprietary trading

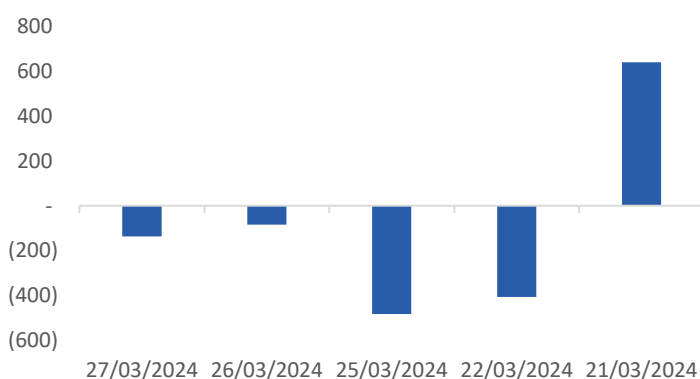
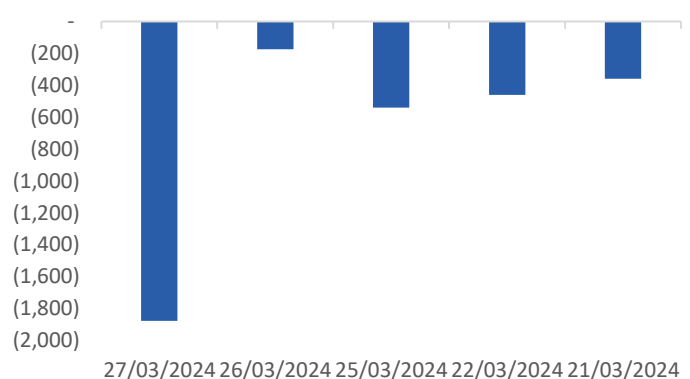


Figure 4
Foreign transactions



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 ownership	Link
VCB	Bank	95.8	-0.50%	0.7	21,642	4.1	5,910	16.2	105,000	23.5%	Link
BID	Bank	52.5	-0.90%	1.0	12,097	3.4	3,781	13.9	54,578	17.3%	Link
VPB	Bank	19.6	0.00%	1.0	6,286	12.9	1,267	15.5	23,685	27.6%	Link
TCB	Bank	45.6	-0.90%	1.2	6,486	8.5	5,111	8.9	-	22.5%	Link
MBB	Bank	25.3	0.20%	1.0	5,407	11.7	3,966	6.4	24,400	22.9%	Link
STB	Bank	30.9	-0.30%	1.0	2,355	18.9	4,094	7.5	31,200	24.3%	Link
CTG	Bank	35.5	0.90%	1.0	7,706	7.3	3,723	9.5	19,100	297.4%	Link
ACB	Bank	28.0	0.20%	0.8	4,396	6.7	4,131	6.8	42,500	30.0%	Link
SSI	Securities	38.5	1.30%	1.2	2,333	29.2	1,529	25.2	45,900	44.5%	Link
IDC	IP	58.8	0.50%	1.0	784	2.1	4,221	13.9	-	21.0%	Link
HPG	Material	30.6	0.20%	1.3	7,192	30.1	1,176	26.0	23,300	25.0%	Link
HSG	Material	24.1	2.60%	1.6	600	26.7	1,321	18.2	79,900	21.6%	Link
VHM	Real estate	42.5	-0.60%	1.3	7,480	13.0	7,664	5.5	38,900	21.6%	Link
KDH	Real estate	38.4	-0.50%	1.3	1,241	3.5	895	42.9	44,100	38.9%	Link
NLG	Real estate	44.2	-0.20%	1.3	687	5.3	1,257	35.2	46,100	46.9%	Link
DGC	Chemicals	120.7	0.00%	1.5	1,853	7.4	8,163	14.8	85,000	19.8%	Link
DCM	Fertilizer	35.2	0.10%	1.4	752	3.3	2,095	16.8	41,000	8.7%	Link
GAS	O&G	80.3	-0.50%	0.7	7,455	2.8	5,053	15.9	36,000	2.4%	Link
PVS	O&G	39.2	0.30%	0.8	757	11.0	2,148	18.3	110,500	17.8%	Link
PVD	O&G	32.5	-0.60%	1.2	730	6.7	1,035	31.4	45,000	20.9%	Link
POW	Utilities	11.4	0.00%	0.8	1,084	2.7	459	24.9	38,500	3.7%	Link
VHC	Fishery	77.0	0.50%	1.0	699	1.7	4,793	16.1	29,000	32.3%	Link
GMD	Logistics	80.0	1.40%	1.1	989	5.3	7,262	11.0	14,500	49.0%	Link
VNM	Retail	67.7	0.00%	0.7	5,719	7.2	4,246	15.9	81,700	51.8%	Link
MSN	Retail	75.4	1.90%	1.4	4,361	18.5	293	257.7	27,700	27.2%	Link
MWG	Retail	50.7	4.20%	1.6	2,997	26.1	115	442.2	63,800	44.5%	Link
PNJ	Retail	97.5	0.10%	0.7	1,318	5.5	6,011	16.2	83,500	49.0%	Link
DGW	Retail	65.6	0.80%	1.5	443	4.7	2,121	30.9	90,900	24.2%	Link
FPT	Technology	115.2	0.20%	0.8	5,914	6.1	5,091	22.6	57,000	49.0%	Link
CTR	Technology	142.7	5.70%	1.0	660	3.2	4,510	31.6	108,000	10.8%	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	Gia đồng cửa (1000 VNĐ)	% Ngày	Beta	Vốn hóa (Tr USD)	Thanh khoản (tr USD)	EPS fw (VND)	P/E fw	P/B	NN sở hữu	ROE (%)
HDB	Bank	24.2	-0.20%	0.8	2,843	5.6	3,482	6.9	1.6	19.6%	23.2%
VIB	Bank	24.2	-0.60%	1.2	2,481	5.4	3,376	7.2	1.6	20.5%	28.8%
TPB	Bank	19.2	0.30%	1.1	1,709	4.7	2,027	9.5	1.3	28.7%	19.8%
MSB	Bank	14.8	-0.30%	1.3	1,192	3.0	2,322	6.4	0.9	30.0%	17.8%
EIB	Bank	18.6	-0.30%	0.9	1,309	10.2	1,244	15.0	1.4	3.6%	12.6%
HCM	Securities	29.0	2.50%	1.3	884	8.8	1,475	19.7	1.6	29.4%	7.3%
VCI	Securities	52.8	-0.80%	1.7	934	9.8	1,124	47.0	3.1	23.4%	4.7%
VND	Securities	23.3	-0.60%	1.5	1,147	34.9	1,662	14.0	1.7	22.0%	3.8%
BSI	Securities	62.1	0.20%	1.5	509	1.0	2,013	30.8	2.7	40.2%	8.2%
SHS	Securities	20.5	0.50%	1.6	674	14.0	688	29.8	1.6	10.3%	4.3%
LCG	Construction	14.0	-0.70%	1.5	107	3.7	635	22.0	1.1	3.7%	3.8%
HUT	Construction	19.3	0.50%	1.7	696	2.8	45	429.4	1.9	0.0%	1.3%
CTD	Construction	73.5	0.30%	0.9	297	4.9	1,894	38.8	0.9	44.9%	0.8%
HHV	Construction	15.7	1.00%	1.3	261	6.2	777	20.2	0.9	9.7%	4.2%
C4G	Construction	11.7	0.90%	1.5	-	0.9	431	27.2	1.1	0.0%	5.2%
DIG	IP	32.8	2.50%	1.8	807	29.7	283	115.7	2.6	6.1%	1.1%
CEO	IP	23.6	0.00%	1.0	491	12.7	297	79.4	2.1	5.3%	8.3%
KBC	IP	35.6	-1.50%	1.5	1,103	11.3	2,606	13.6	1.5	23.0%	18.9%
VGC	IP	58.8	-0.20%	1.3	1,066	1.8	2,717	21.6	3.4	5.2%	13.6%
SZC	IP	43.2	-0.20%	1.3	315	1.5	1,824	23.7	3.0	2.3%	10.9%
SIP	IP	89.0	-1.70%	1.5	654	0.8	5,260	16.9	4.5	0.7%	26.5%
PHR	IP	64.1	0.00%	1.1	351	0.8	4,574	14.0	2.4	17.5%	26.9%
GVR	IP	33.4	-1.50%	1.5	5,400	3.5	646	51.7	2.7	0.5%	7.0%
NKG	Material	26.0	0.00%	1.5	277	12.3	446	58.3	1.3	15.4%	13.5%
BMP	Chemicals	112.4	3.60%	0.5	372	1.5	12,717	8.8	3.4	85.6%	38.4%
IJC	Real estate	15.8	-0.30%	1.7	241	1.0	1,569	10.1	1.0	3.1%	10.9%
DXG	Real estate	20.3	2.30%	1.8	591	17.5	239	85.1	1.6	19.4%	3.4%
VRE	Real estate	26.0	-1.70%	1.2	2,384	6.1	1,940	13.4	1.6	29.7%	10.7%
PDR	Real estate	32.1	0.30%	1.9	959	15.7	926	34.7	2.6	7.8%	9.0%
CSV	Chemicals	60.9	6.80%	1.4	109	4.7	4,732	12.9	2.0	4.1%	21.0%
DHC	Chemicals	43.8	0.20%	1.0	142	0.7	3,840	11.4	1.9	39.9%	18.1%
PLX	O&G	38.0	0.00%	1.0	1,952	2.0	2,213	17.2	2.0	17.5%	11.7%
PLC	O&G	34.7	0.00%	1.4	113	0.4	1,333	26.0	2.1	1.1%	8.5%
BSR	O&G	19.4	0.00%	1.2	-	3.6	2,790	7.0	1.1	0.0%	9.7%
DRC	Tyre	32.6	-0.60%	0.7	156	1.3	2,074	15.7	2.1	11.7%	13.5%
PC1	Utilities	28.6	0.90%	1.3	359	6.9	439	65.0	2.2	7.1%	5.0%
HDG	Utilities	29.8	2.10%	1.3	368	5.3	2,327	12.8	1.6	17.2%	16.8%
GEX	Utilities	25.0	-0.20%	1.9	862	21.0	388	64.6	1.8	10.9%	5.4%
QTP	Utilities	15.6	0.60%	0.6	-	0.1	1,366	11.4	1.4	1.2%	9.9%
REE	Utilities	63.9	-0.30%	0.9	1,056	1.7	5,354	11.9	1.5	49.0%	18.5%
ANV	Fishery	34.8	0.70%	1.3	188	2.5	314	110.9	1.9	2.3%	10.0%
PTB	Fishery	65.5	4.50%	0.7	177	1.2	4,368	15.0	1.6	24.0%	13.4%
PVT	Logistics	29.1	0.50%	0.9	381	3.2	3,005	9.7	1.4	13.2%	16.4%
VSC	Logistics	23.6	6.80%	1.4	254	12.7	946	24.9	1.1	1.6%	7.9%
HAH	Logistics	43.6	1.90%	1.4	186	4.7	3,648	11.9	1.8	3.5%	24.6%
VTP	Logistics	89.4	2.30%	1.1	440	3.8	3,122	28.6	7.0	7.3%	15.1%
DBC	Retail	31.7	0.60%	1.4	310	9.8	103	306.8	1.6	2.7%	2.9%
FRT	Retail	147.0	-0.60%	0.6	810	7.1	(2,537)	-57.9	14.2	35.9%	11.8%
QNS	Retail	49.5	2.90%	0.7	-	2.7	6,117	8.1	2.1	15.2%	24.3%
DPM	Fertilizer	35.8	-0.40%	1.3	567	2.5	1,327	27.0	1.3	8.6%	19.1%
TNG	Textile	22.8	4.10%	0.9	105	4.0	1,997	11.4	1.6	20.4%	17.1%

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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