

MARKET TREND FOREACAST

| | Negative | Neutral | Positive |
|-------------------|----------|---------|----------|
| Day 1/4/2024 | | ● | |
| Week 1/4-5/4/2024 | | ● | |
| Month 04/2024 | | ● | |

STOCK MARKET

VN-Index encountered profit-taking pressure right from the morning session and gradually dropped to close at 1,284.09 points, down more than 6 points compared to yesterday. Market breadth tilted to the negative side with 11/18 sectors decreasing, of which the Communications led the decline. Regarding foreign investors, today they were net sellers on the HSX and net buyers on the HNX. In the short term, VN-Index may continue to trade in the range of 1,280 - 1,300.

FUTURES CONTRACTS

Futures contracts decreased in accordance with the movement of VN30.

COVERED WARRANTS

During the trading session on March 29, 2024, warrants fluctuated according to the correction of the underlying stock.

HIGHLIGHT

- VN-Index **-6.09** points, closing at **1284.09** points. HNX-Index **-1.34** points, closing at **242.58** points.
- Pulling the index up: **LPB (+0.42)**, **VIB (+0.22)**, **VPB (+0.2)**, **ACB (+0.14)**, **SIP (+0.14)**.
- Pulling the index down: **VCB (-1.09)**, **BID (-0.69)**, **MSN (-0.62)**, **VHM (-0.48)**, **HPG (-0.42)**.
- The matched trade value of VN-Index reached VND **19,346** billion, decreased **-15.10%** compared to the previous session. The total transaction value reached VND 23,149 billion.
- The trading range is 10.31 points. The market had **159** gainers, 296 remaining unchanged, **83** losers.
- Foreign investors' net selling value: VND **-792.72** billion on HOSE, including **MSN (VND -218.52 billion)**, **VND (VND -189.46 billion)**, **VHM (VND -150.85 billion)**, **STB (VND -145.27 billion)**, **VNM (VND -94.14 billion)**. Foreign investors were net buyers on HNX with the value of VND **54.11** billion.

BSC30, BSC50 PERFORMANCE

- BSC30 **-0.52%**. Positive stocks: **PNJ (+1.23%)**, **PVS (+1.03%)**, **IDC (+0.85%)**.
- BSC50 **-0.27%**. Positive stocks: **CSV (+6.23%)**, **SIP (+3.41%)**, **DRC (+3.08%)**.

Indices' performances

| | BSC30 | BSC50 | VN Index | VN30 Index |
|----------|--------|--------|----------|------------|
| 1 day | -0.52% | -0.27% | -0.47% | -0.48% |
| 1 week | 1.32% | 1.07% | 0.65% | 1.48% |
| 1 months | 1.12% | 0.92% | 1.43% | 2.21% |
| 3 months | 26.24% | 20.04% | 9.45% | 8.21% |

Overview of Vietnam stock market

| | VNI | HNX | UPCOM |
|---------------|----------|--------|-------|
| Điểm | 1,284.09 | 242.58 | 91.57 |
| % 1D | -0.47% | -0.55% | 0.10% |
| GTGD (tỷ VND) | 19,346 | 1,663 | 560 |
| %1D | -15.10% | -6.71% | 4.19% |
| GDNN (tỷ VND) | -792.72 | 54.11 | 25.11 |

Foreign transactions (Bil. VND)

| Top buy | Value | Top sell | Value |
|---------|--------|----------|---------|
| MWG | 169.75 | MSN | -218.52 |
| VPB | 54.70 | VND | -189.46 |
| SSI | 34.81 | VHM | -150.85 |
| CTG | 27.32 | STB | -145.27 |
| DRC | 24.02 | VNM | -94.14 |

Overview of global stock markets

| | | %D | %W |
|-----------|--------|-------|--------|
| SPX | 5,254 | 0.11% | 0.24% |
| FTSE100 | 7,953 | 0.26% | 0.89% |
| Eurostoxx | 4,428 | 0.29% | 0.58% |
| Shanghai | 3,041 | 1.01% | -0.23% |
| Nikkei | 40,369 | 0.50% | -1.29% |

Source: Bloomberg

Commodities

| | Close | % |
|-------|---------|-------|
| Brent | 87.0 | 1.90% |
| Gold | 2,233.7 | 1.80% |

Exchange rate

| | | % |
|---------|----------|-------|
| USD/VND | 24,970.0 | 0.08% |
| EUR/VND | 27,447.8 | 0.01% |
| JPY/VND | 168.2 | 0.15% |

Interst rates

| 1M-interbank rate | 2.36% |
|-------------------|-------|
| 10Y-Gov bond rate | 2.67% |

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) |
|-----|-------|-------|----------|--------------|
| LPB | 16.90 | 3.85% | 0.42 | 8.05 |
| VIB | 24.25 | 1.44% | 0.22 | 10.05 |
| VPB | 19.65 | 0.51% | 0.20 | 33.68 |
| ACB | 28.35 | 0.53% | 0.14 | 16.42 |
| SIP | 90.90 | 3.41% | 0.14 | 0.67 |

Top 5 leaders on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|-------|----------|--------------|
| VCS | 70.10 | 2.85% | 1.29 | 0.19 |
| DTK | 11.10 | 2.70% | 0.83 | 0.00 |
| HHC | 81.90 | 9.52% | 0.55 | 0.00 |
| PVS | 39.00 | 0.51% | 0.38 | 6.76 |
| PVI | 49.40 | 0.81% | 0.37 | 0.06 |

Top 5 gainers on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|-------|----------|--------------|
| CLW | 34.85 | 6.89% | 0.01 | 0.00 |
| HMC | 12.35 | 6.88% | 0.01 | 0.94 |
| SVD | 3.25 | 6.77% | 0.00 | 0.49 |
| CSV | 61.00 | 6.23% | 0.04 | 1.76 |
| TDM | 45.00 | 4.22% | 0.05 | 0.01 |

Top 5 gainers on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| DC2 | 6.00 | 10.00% | 0.02 | 0.01 |
| MCO | 24.10 | 9.96% | 0.04 | 0.23 |
| PTD | 8.10 | 9.88% | 0.01 | 0.00 |
| HMR | 20.50 | 9.76% | 0.05 | 0.27 |
| TPH | 15.40 | 9.74% | 0.01 | 0.00 |

Top 5 laggards on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| VCB | 95.70 | -0.84% | -1.09 | 0.97 |
| BID | 52.60 | -0.95% | -0.69 | 1.81 |
| MSN | 76.00 | -2.37% | -0.62 | 20.71 |
| VHM | 43.30 | -1.04% | -0.48 | 7.71 |
| HPG | 30.55 | -0.98% | -0.42 | 17.76 |

Top 5 laggards on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| SHS | 20.60 | -2.43% | -1.56 | 18.81 |
| PTI | 39.40 | -9.90% | -1.11 | 0.00 |
| HUT | 19.70 | -1.52% | -1.04 | 3.03 |
| CEO | 23.40 | -2.14% | -0.99 | 11.62 |
| MBS | 30.80 | -1.62% | -0.85 | 2.79 |

Top 5 losers on the HSX

| | Close | % | Index pt | Volume (mil) |
|-----|-------|--------|----------|--------------|
| HU1 | 5.48 | -4.74% | 0.00 | 0.00 |
| POM | 5.28 | -4.17% | -0.01 | 7.13 |
| HPX | 8.20 | -4.15% | -0.02 | 15.09 |
| RDP | 6.80 | -3.97% | 0.00 | 0.58 |
| NHT | 12.60 | -3.97% | 0.00 | 0.00 |

Top 5 losers on the HNX

| | Close | % | Index pt | Volume (mil) |
|-----|--------|--------|----------|--------------|
| VE4 | 288.20 | -9.99% | -0.10 | 0.01 |
| HAT | 51.50 | -9.90% | -0.06 | 0.00 |
| PTI | 39.40 | -9.90% | -1.11 | 0.00 |
| CX8 | 8.70 | -9.20% | -0.01 | 0.00 |
| GDW | 27.70 | -8.66% | -0.08 | 0.00 |

Figure 1
HSX-Index Intraday

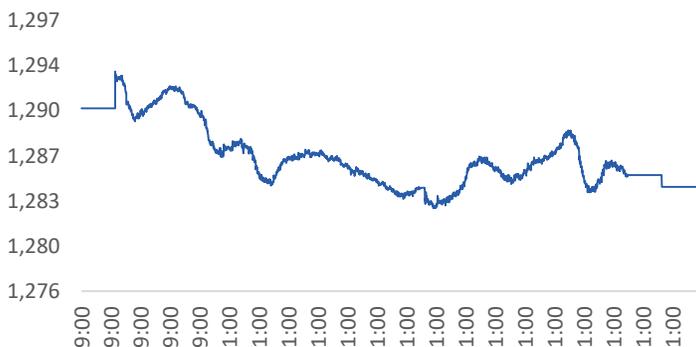


Figure 2
HNX-Index Intraday

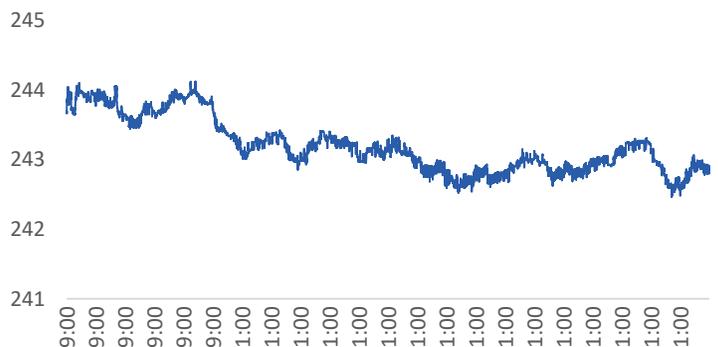


Figure 3
Proprietary trading

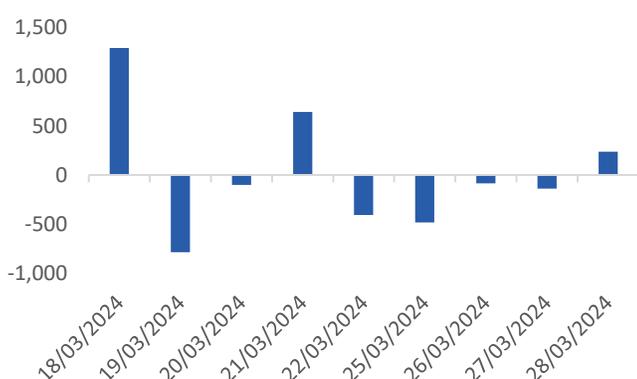
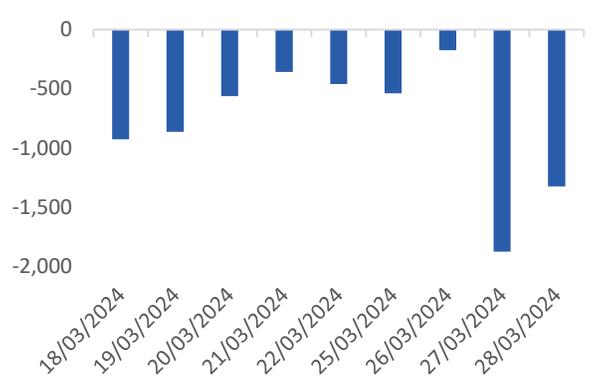


Figure 4
Foreign transactions



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 | 94.9 | -0.80% | 0.7 | 21,400 | 3.1 | 5,797 | 16.4 | 105,000 | 23.5% | Link |
| BID | Bank | 52.1 | -1.00% | 1.0 | 11,983 | 3.8 | 3,572 | 14.6 | 54,578 | 17.3% | Link |
| VPB | Bank | 19.8 | 0.50% | 1.0 | 6,322 | 16.4 | 1,461 | 13.5 | 23,685 | 28.0% | Link |
| TCB | Bank | 47.6 | -0.90% | 1.2 | 6,758 | 12.3 | 5,052 | 9.4 | - | 22.5% | Link |
| MBB | Bank | 25.4 | -0.40% | 1.0 | 5,418 | 11.9 | 3,448 | 7.4 | 24,400 | 23.2% | Link |
| STB | Bank | 31.6 | -1.20% | 1.0 | 2,404 | 44.1 | 3,600 | 8.8 | 31,200 | 22.5% | Link |
| CTG | Bank | 35.6 | -0.60% | 1.0 | 7,702 | 6.4 | 3,279 | 10.8 | 19,100 | 27.1% | Link |
| ACB | Bank | 28.5 | 0.50% | 0.8 | 4,466 | 15.5 | 3,722 | 7.7 | 42,500 | 30.0% | Link |
| SSI | Securities | 38.5 | -1.70% | 1.2 | 2,329 | 27.2 | 1,090 | 35.3 | 45,900 | 43.2% | Link |
| IDC | IP | 59.0 | 0.30% | 1.0 | 786 | 4.9 | 3,900 | 15.1 | - | 17.6% | Link |
| HPG | Material | 30.2 | -1.00% | 1.3 | 7,097 | 18.1 | 1,177 | 25.7 | 23,300 | 24.5% | Link |
| HSG | Material | 23.6 | -1.70% | 1.6 | 588 | 9.5 | 1,318 | 17.9 | 79,900 | 22.1% | Link |
| VHM | Real estate | 42.8 | -1.00% | 1.3 | 7,528 | 13.3 | 7,586 | 5.6 | 38,900 | 22.4% | Link |
| KDH | Real estate | 37.8 | -0.30% | 1.3 | 1,219 | 4.5 | 892 | 42.4 | 44,100 | 38.0% | Link |
| NLG | Real estate | 43.4 | -1.00% | 1.3 | 673 | 4.0 | 746 | 58.1 | 46,100 | 42.9% | Link |
| DGC | Chemicals | 123.4 | -0.40% | 1.5 | 1,891 | 9.8 | 7,968 | 15.5 | 85,000 | 18.9% | Link |
| DCM | Fertilizer | 35.2 | -1.10% | 1.4 | 751 | 2.7 | 2,093 | 16.8 | 41,000 | 10.9% | Link |
| GAS | O&G | 80.2 | -0.10% | 0.7 | 7,432 | 2.0 | 5,018 | 16.0 | 36,000 | 2.6% | Link |
| PVS | O&G | 39.2 | 0.50% | 0.8 | 756 | 10.7 | 1,792 | 21.9 | 110,500 | 20.8% | Link |
| PVD | O&G | 32.4 | 0.50% | 1.2 | 726 | 8.7 | 1,068 | 30.3 | 45,000 | 23.3% | Link |
| POW | Utilities | 11.4 | -0.40% | 0.8 | 1,077 | 2.2 | 424 | 26.9 | 38,500 | 4.0% | Link |
| VHC | Fishery | 78.4 | -1.10% | 1.0 | 710 | 1.4 | 3,865 | 20.3 | 29,000 | 32.2% | Link |
| GMD | Logistics | 79.7 | -0.40% | 1.1 | 984 | 2.2 | 6,736 | 11.8 | 14,500 | 48.2% | Link |
| VNM | Retail | 67.6 | -0.10% | 0.7 | 5,700 | 9.5 | 4,214 | 16.0 | 81,700 | 53.9% | Link |
| MSN | Retail | 74.2 | -2.40% | 1.4 | 4,284 | 24.9 | (338) | -219.3 | 27,700 | 28.2% | Link |
| MWG | Retail | 51.1 | 0.20% | 1.6 | 3,015 | 24.4 | 115 | 446.1 | 63,800 | 44.5% | Link |
| PNJ | Retail | 98.9 | 1.20% | 0.7 | 1,335 | 11.0 | 5,893 | 16.8 | 83,500 | 49.0% | Link |
| DGW | Retail | 66.1 | 0.50% | 1.5 | 446 | 7.3 | 2,112 | 31.3 | 90,900 | 23.4% | Link |
| FPT | Technology | 116.5 | -0.50% | 0.8 | 5,969 | 6.3 | 4,576 | 25.5 | 57,000 | 49.0% | Link |
| CTR | Technology | 138.3 | -2.70% | 1.0 | 638 | 3.8 | 4,515 | 30.6 | 108,000 | 10.1% | 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 ownership | ROE (%) |
|--------|--------------|-------------------|--------|------|--------------|---------------------|--------------|--------|------|-------------------|---------|
| HDB | Bank | 24.1 | -0.60% | 0.8 | 2,832 | 6.3 | 2,746 | 8.8 | 1.8 | 19.6% | 23.2% |
| VIB | Bank | 24.6 | 1.40% | 1.2 | 2,518 | 6.1 | 3,534 | 7.0 | 1.9 | 20.5% | 28.8% |
| TPB | Bank | 19.1 | 0.00% | 1.1 | 1,697 | 4.5 | 2,697 | 7.1 | 1.4 | 29.8% | 19.8% |
| MSB | Bank | 14.6 | -2.30% | 1.3 | 1,174 | 4.8 | 2,405 | 6.0 | 1.0 | 30.0% | 17.8% |
| EIB | Bank | 18.4 | -0.50% | 0.9 | 1,292 | 3.8 | 1,462 | 12.6 | 1.7 | 1.8% | 12.6% |
| HCM | Securities | 29.5 | -1.80% | 1.3 | 898 | 8.7 | 757 | 38.9 | 2.8 | 41.0% | 7.3% |
| VCI | Securities | 53.8 | 0.20% | 1.7 | 950 | 8.2 | 780 | 69.0 | 3.2 | 21.7% | 4.7% |
| VND | Securities | 23.0 | -1.10% | 1.5 | 1,128 | 31.2 | 467 | 49.2 | 1.9 | 22.6% | 3.8% |
| BID | Bank | 52.1 | -1.00% | 1.0 | 11,983 | 3.8 | 3,572 | 14.6 | 2.8 | 17.3% | 20.7% |
| SHS | Securities | 20.1 | -2.40% | 1.6 | 659 | 14.9 | 507 | 39.6 | 1.7 | 13.2% | 4.3% |
| LCG | Construction | 13.8 | 1.10% | 1.5 | 106 | 2.3 | 648 | 21.4 | 1.0 | 2.1% | 3.8% |
| HUT | Construction | 19.4 | -1.50% | 1.7 | 699 | 2.4 | 34 | 564.5 | 2.1 | 1.6% | 1.3% |
| CTD | Construction | 73.0 | 0.40% | 0.9 | 294 | 3.6 | 1,881 | 38.8 | 0.9 | 44.3% | 0.8% |
| HHV | Construction | 15.4 | -1.00% | 1.3 | 256 | 3.6 | 735 | 20.9 | 1.2 | 6.7% | 4.2% |
| C4G | Construction | 11.4 | -2.60% | 1.5 | - | 0.6 | 432 | 26.4 | 1.1 | 0.0% | 5.2% |
| DIG | IP | 32.2 | -1.50% | 1.8 | 792 | 21.9 | 289 | 111.4 | 2.5 | 5.2% | 1.1% |
| CEO | IP | 22.9 | -2.10% | 1.0 | 476 | 10.5 | 348 | 65.9 | 1.9 | 5.6% | 8.3% |
| KBC | IP | 35.0 | -1.70% | 1.5 | 1,082 | 13.7 | 2,490 | 14.0 | 1.3 | 20.8% | 18.9% |
| VGC | IP | 58.4 | -1.70% | 1.3 | 1,056 | 3.3 | 2,820 | 20.7 | 2.8 | 5.4% | 13.6% |
| SZC | IP | 44.0 | 2.20% | 1.3 | 320 | 5.2 | 1,218 | 36.1 | 4.6 | 3.2% | 10.9% |
| SIP | IP | 94.0 | 3.40% | 1.5 | 690 | 2.5 | 5,024 | 18.7 | 4.2 | 0.3% | 26.5% |
| PHR | IP | 63.9 | 0.50% | 1.1 | 349 | 2.5 | 4,368 | 14.6 | 2.3 | 15.8% | 26.9% |
| GVR | IP | 33.2 | 0.30% | 1.5 | 5,350 | 4.3 | 538 | 61.6 | 2.4 | 0.3% | 7.0% |
| NKG | Material | 25.6 | -1.70% | 1.5 | 272 | 6.4 | 464 | 55.2 | 1.3 | 16.0% | 13.5% |
| BMP | Chemicals | 110.0 | -2.70% | 0.5 | 363 | 1.2 | 12,704 | 8.7 | 3.4 | 85.9% | 38.4% |
| IJC | Real estate | 15.8 | -1.60% | 1.7 | 241 | 1.8 | 1,046 | 15.1 | 1.6 | 5.9% | 10.9% |
| DXG | Real estate | 19.8 | -0.70% | 1.8 | 577 | 10.7 | 245 | 80.9 | 1.0 | 20.0% | 3.4% |
| VRE | Real estate | 25.8 | 0.80% | 1.2 | 2,370 | 5.2 | 1,940 | 13.3 | 1.6 | 31.0% | 10.7% |
| PDR | Real estate | 31.8 | -0.80% | 1.9 | 949 | 11.5 | 926 | 34.4 | 2.5 | 7.4% | 9.0% |
| CSV | Chemicals | 64.8 | 6.20% | 1.4 | 116 | 4.6 | 4,558 | 14.2 | 2.0 | 3.7% | 21.0% |
| DHC | Chemicals | 43.6 | -0.70% | 1.0 | 142 | 0.3 | 3,840 | 11.4 | 1.9 | 35.8% | 18.1% |
| PLX | O&G | 37.3 | -0.70% | 1.0 | 1,912 | 1.7 | 2,123 | 17.6 | 1.8 | 17.1% | 11.7% |
| PLC | O&G | 34.4 | 0.60% | 1.4 | 112 | 0.4 | 1,333 | 25.8 | 2.1 | 1.2% | 8.5% |
| BSR | O&G | 19.3 | -0.50% | 1.2 | - | 3.7 | 2,756 | 7.0 | 1.1 | 0.8% | 9.7% |
| DRC | Tyre | 33.5 | 3.10% | 0.7 | 161 | 6.2 | 2,086 | 16.1 | 2.1 | 13.6% | 13.5% |
| PC1 | Utilities | 28.4 | 0.00% | 1.3 | 357 | 6.2 | 106 | 268.7 | 1.5 | 8.5% | 5.0% |
| HDG | Utilities | 29.2 | -0.70% | 1.3 | 361 | 2.9 | 2,004 | 14.6 | 1.3 | 22.8% | 16.8% |
| GEX | Utilities | 24.9 | 0.40% | 1.9 | 855 | 21.9 | 299 | 83.3 | 1.1 | 12.6% | 5.4% |
| QTP | Utilities | 15.9 | 1.90% | 0.6 | - | 0.2 | 1,366 | 11.6 | 1.4 | 1.2% | 9.9% |
| REE | Utilities | 63.8 | -0.20% | 0.9 | 1,052 | 2.3 | 4,974 | 12.8 | 1.3 | 49.0% | 18.5% |
| ANV | Fishery | 34.8 | -1.60% | 1.3 | 187 | 1.8 | 329 | 105.6 | 1.8 | 3.0% | 10.0% |
| PTB | Fishery | 65.9 | 2.80% | 0.7 | 178 | 1.3 | 4,347 | 15.2 | 1.6 | 20.9% | 13.4% |
| PVT | Logistics | 28.6 | -0.30% | 0.9 | 374 | 2.5 | 2,660 | 10.8 | 1.0 | 12.3% | 16.4% |
| VSC | Logistics | 23.2 | -1.10% | 1.4 | 249 | 5.6 | 296 | 78.2 | 1.9 | 2.5% | 7.9% |
| HAH | Logistics | 42.9 | -1.50% | 1.4 | 183 | 3.1 | 3,681 | 11.7 | 1.4 | 3.9% | 24.6% |
| VTP | Logistics | 87.9 | -0.90% | 1.1 | 432 | 4.7 | 3,122 | 28.2 | 6.9 | 9.4% | 15.1% |
| DBC | Retail | 32.4 | 0.60% | 1.4 | 316 | 13.7 | 103 | 313.5 | 1.7 | 4.5% | 2.9% |
| FRT | Retail | 156.0 | -0.60% | 0.6 | 858 | 5.6 | (2,577) | -60.5 | 14.3 | 36.2% | 11.8% |
| QNS | Retail | 49.6 | -0.80% | 0.7 | - | 1.1 | 6,134 | 8.1 | 2.1 | 15.5% | 24.3% |
| DPM | Fertilizer | 35.8 | -1.20% | 1.3 | 565 | 3.0 | 1,352 | 26.5 | 1.3 | 10.0% | 19.1% |
| TNG | Textile | 22.2 | -1.30% | 0.9 | 102 | 1.6 | 1,997 | 11.1 | 1.5 | 18.6% | 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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