

🕒 08:00 AM · PRE-MARKET



MORNING NOTE

Key macro developments and pre-market signals to watch.

[Place order](#)

[Research Center](#)

🌐 US EQUITY INDICES

| Index | Level | +/- (%) |
|------------------------|-----------|-----------------|
| Dow Jones | 49,693.20 | -67.36 (-0.14%) |
| S&P 500 derived | 7,444.25 | +43.29 (0.58%) |
| Nasdaq | 26,402.34 | +314.14 (1.2%) |
| Small Cap 2000 derived | 2,843.93 | +1.1 (0.04%) |
| S&P 500 VIX derived | 17.79 | -0.08 (-0.45%) |
| S&P/TSX | 34,041.43 | -249.3 (-0.73%) |

Source: Investing.com, Vietstock, compiled by Aseansc

📺 ASEAN DIGITAL SECURITIES YOUTUBE CHANNEL

[View channel](#)



FEATURED VIDEO

Quick market updates from ASEAN Securities



YOUTUBE CHANNEL



ASEAN SHORTS

Watch the latest short videos

ASEAN CHANNEL

ASEAN Digital Securities YouTube Shorts



🌐 INTERNATIONAL NEWS



US and China consider cutting tariffs on goods

— The US and China are expected to establish a controlled trade mechanism and reduce tariffs on around USD30bn of non-sensitive goods to foster cooperation.

GLOBAL NEWS | 🕒 Updated at 15:33:11 · 14/05/2026



US-China summit: Markets watch for key signals on oil, gold, and the global economy —

The summit between Donald Trump and Xi Jinping is expected to open a new equilibrium between the world's two largest economies. All...

GLOBAL NEWS | 🕒 Updated at 15:33:11 · 14/05/2026



Xi: The US and China should be "partners rather than rivals" — Chinese President Xi Jinping told US President Donald Trump that the US and China should become "partners rather than rivals", while President...

GLOBAL NEWS | Updated at 15:33:11 · 14/05/2026



US issues 30-year bonds at above 5% yield for first time in nearly two decades — The US government issued 30-year bonds with yields above 5% for the first time since 2007, amid growing signs...

GLOBAL NEWS | Updated at 15:33:11 · 14/05/2026



US Senate approves Kevin Warsh as Fed Chair — The US Senate approved Kevin Warsh as Chair of the US Federal Reserve, paving the way for the financier to replace Jerome Powell...

GLOBAL NEWS | Updated at 15:33:11 · 14/05/2026



ACI: Airfares likely to remain elevated — Airports Council International (ACI) warned that rising fuel costs and higher airfares threaten airline operations and could disrupt travel...

GLOBAL NEWS | Updated at 15:33:11 · 14/05/2026



Global gold extends decline amid inflation concerns — Gold prices fell for a second straight session on May 13 as war-driven inflation concerns continued to weigh on rate-cut expectations...

GLOBAL NEWS | Updated at 15:33:11 · 14/05/2026



Brent crude falls 2% as Trump visits China — Oil prices declined on May 13 as investors monitored a fragile Middle East ceasefire and awaited a key summit in Beijing...

GLOBAL NEWS | Updated at 15:33:11 · 14/05/2026

📍 DOMESTIC NEWS

[🛒 Place order](#)



EVN's accumulated losses fall from over VND44.7tn to VND5.611tn

ECONOMY - INVESTMENT | 39 minutes ago



HCMC needs attractive mechanisms to draw private investment into strategic sectors

ECONOMY - INVESTMENT | 46 minutes ago



Dinh Duc Quang (UOB): Vietnam stands out in FDI attraction; ample room from cross-border capital and bonds

ECONOMY - INVESTMENT | 1 hour ago



Vietnam macro 2026: Navigating global headwinds, entering a new cycle on policy support

MACRO | 3 hours ago



Ministry of Industry and Trade proposes handling EVN's nearly VND45tn accumulated loss

ECONOMY - INVESTMENT | 4 hours ago



One year of Resolution 68: Identifying bottlenecks holding back the private sector

NEWS | Today

🏢 CORPORATE NEWS

[🛒 Place order](#)



Fideco mortgages a VND4.3tn-plus Can Gio project for bank loans; plans major issuance of over 261mn shares — Fideco is using future assets from its Can Gio project as collateral for bank loans. The company also plans to raise capital...

CORPORATE NEWS | Updated at 15:33:11 · 14/05/2026



Pomina Steel continues to post heavy losses — Pomina Steel's Q1 2026 financials show the company has yet to escape selling below cost and...

CORPORATE NEWS | Updated at 15:33:11 · 14/05/2026



Loc Troi asks shareholders for understanding if shares are delisted; audited report expected in Q3 — Loc Troi Group's recent extraordinary general meeting revealed the difficult restructuring process currently underway at the sector heavyweight...

CORPORATE NEWS | Updated at 15:33:11 · 14/05/2026



AST's Q1 net profit rises 85%; to issue 9mn shares for dividend payment — Taseco Air Services JSC's Board of Directors (HOSE: AST) approved a 2025 stock dividend plan at a 20% ratio, equivalent to existing shareholders...

CORPORATE NEWS | Updated at 15:33:11 · 14/05/2026



Dinh Vu Port to pay cash dividend of VND5,000/share — Dinh Vu Port Investment & Development JSC (HOSE: DVP) announced the record date for its first 2025 cash dividend at a 50% ratio, equivalent to VND5,000/share.

CORPORATE NEWS | Updated at 15:33:11 · 14/05/2026



DHC to issue over 9.6mn shares for 2025 stock dividend — Dong Hai Ben Tre JSC (HOSE: DHC) announced the implementation of its 10% stock dividend issuance plan.

CORPORATE NEWS | Updated at 15:33:11 · 14/05/2026



EVENT CALENDAR

Upcoming corporate and macro events

06/2026

19

GMX

Cash dividend payment of VND1,200/share

Dividend

06/2026

18

VWS

Cash dividend payment of VND400/share

Dividend

06/2026

26

MCM

Cash dividend payment of VND1,000/share

Dividend

06/2026

24

DNH

Cash dividend payment of VND600/share

Dividend

06/2026

16

DTH

Cash dividend payment of VND400/share

Dividend

06/2026

15

KHX

Cash dividend payment of VND780/share

Dividend

12:00 PM · MID-SESSION



MID-SESSION UPDATE

Morning market pulse, money flow, and key index moves.

[Place order](#)

[Research Center](#)

VN-INDEX

1,925.46

CHANGE

+1.43%
+27.09 pts

VN30

2,068.62

CHANGE

+1.23%
+25.11 pts

HNX-INDEX

255.07

CHANGE

+0.18%
+0.45 pts

TRADING VALUE 18,148.7 bn | -6,969.6 bn (-27.75%)

Adv 165

Unch 76

Dec 128

TRADING VALUE 11,037.8 bn | -3,395.6 bn (-23.53%)

Adv 24

Unch 2

Dec 4

TRADING VALUE 653.9 bn | -567.0 bn (-46.44%)

Adv

Unch

Dec

MARKET RECAP

The VN-Index stayed in positive territory throughout the afternoon session and closed up more than 27 points at the day's high, confirming dominant active buying. The breakout was led by the VN30, with 24/30 constituents advancing, alongside broad-based support from real estate stocks and foreign investors' net buying of over VND196bn, concentrated in large-cap names such as VIC, MSN, and SSI. Although selling pressure remained visible in fertilizers and chemicals, and market liquidity fell sharply vs the previous session, suggesting that investors remained somewhat cautious, the index's close above its intraday average and the strong number of advancers on HOSE further reinforced the short-term recovery trend.

MARKET VIEW

From a technical perspective, the VN-Index is further consolidating a convincing uptrend after closing at 1,925 points, firmly above its MA10 and MA20, while RSI (70) and MFI (58) point to improving upward momentum and healthier money flow. With buyers clearly dominating the session, our constructive scenario is for the index to extend gains and test the 1,940-1,950 resistance zone in the coming sessions. In this context, short-term investors should prioritize buying on pullbacks rather than chasing strength, while taking partial profits near resistance and focusing on stocks with distinct narratives such as State divestment, private-sector development, market upgrade, or the offshore cycle. Medium- to long-term investors can use market volatility to gradually accumulate sector leaders in Banking, Brokerage, Retail, Technology, and Public Investment that have solid fundamentals and attractive valuations.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET BUY/SELL OVER SIX SESSIONS

Today +196

Unit: VND bn · Green bars indicate net buying, red bars indicate net selling · The midline marks breakeven.

6-session cumulative net selling -4.617

Largest swing -1.589

Reversal session

Today



Source: Algo, ASEANSC compilation

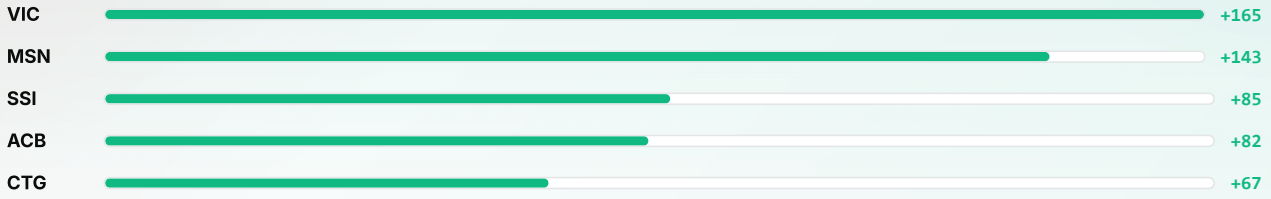
Key highlight: foreign investors net sold a cumulative VND4.617tn over six sessions, with net selling in 5/6 sessions.

FLOW LEADERS

TOP FOREIGN FLOW TICKERS

Top 5 notable foreign net-bought and net-sold tickers in the session.

TOP 5 NET BUYS



TOP 5 NET SELLS



15:30 PM · MARKET CLOSE



MARKET CLOSE

Daily market recap, trend view, and key data highlights.

Place order

Research Center

INDEX SUMMARY

| | | |
|---|---|---|
| <p>VN-INDEX </p> <p>1,925.46 +1.43%</p> <p>CHANGE +27.09 pts</p> <p>TRADING VALUE 18,148.7 bn -6,969.6 bn (-27.75%)</p> <p>Adv 165 Unch 76 Dec 128</p> | <p>VN30 </p> <p>2,068.62 +1.23%</p> <p>CHANGE +25.11 pts</p> <p>TRADING VALUE 11,037.8 bn -3,395.6 bn (-23.53%)</p> <p>Adv 24 Unch 2 Dec 4</p> | <p>HNX-INDEX </p> <p>255.07 +0.18%</p> <p>CHANGE +0.45 pts</p> <p>TRADING VALUE 653.9 bn -567.0 bn (-46.44%)</p> <p>Adv Unch Dec</p> |
|---|---|---|

MARKET RECAP

The VN-Index stayed in positive territory throughout the afternoon session and closed up more than 27 points at the day's high, confirming dominant active buying. The breakout was led by the VN30, with 24/30 constituents advancing, alongside broad-based support from real estate stocks and foreign investors' net buying of over VND196bn, concentrated in large-cap names such as VIC, MSN, and SSI. Although selling pressure remained visible in fertilizers and chemicals, and market liquidity fell sharply vs the previous session, suggesting that investors remained somewhat cautious, the index's close above its intraday average and the strong number of advancers on HOSE further reinforced the short-term recovery trend.

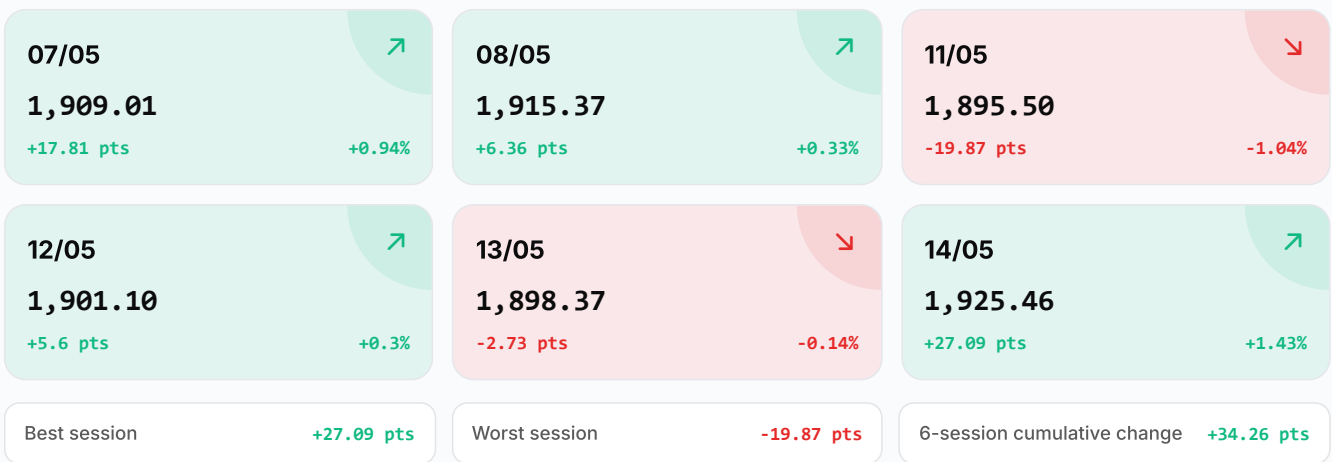
MARKET VIEW

From a technical perspective, the VN-Index is further consolidating a convincing uptrend after closing at 1,925 points, firmly above its MA10 and MA20, while RSI (70) and MFI (58) point to improving upward momentum and healthier money flow. With buyers clearly dominating the session, our constructive scenario is for the index to extend gains and test the 1,940–1,950 resistance zone in the coming sessions. In this context, short-term investors should prioritize buying on pullbacks rather than chasing strength, while taking partial profits near resistance and focusing on stocks with distinct narratives such as State divestment, private-sector development, market upgrade, or the offshore cycle. Medium- to long-term investors can use market volatility to gradually accumulate sector leaders in Banking, Brokerage, Retail, Technology, and Public Investment that have solid fundamentals and attractive valuations.

VN-INDEX MOVEMENTS OVER THE LATEST SIX SESSIONS

Each tile represents a recent session | Showing closing level and change vs the previous session

■ GAINERS
 ■ LAGGARDS
 ■ FLAT



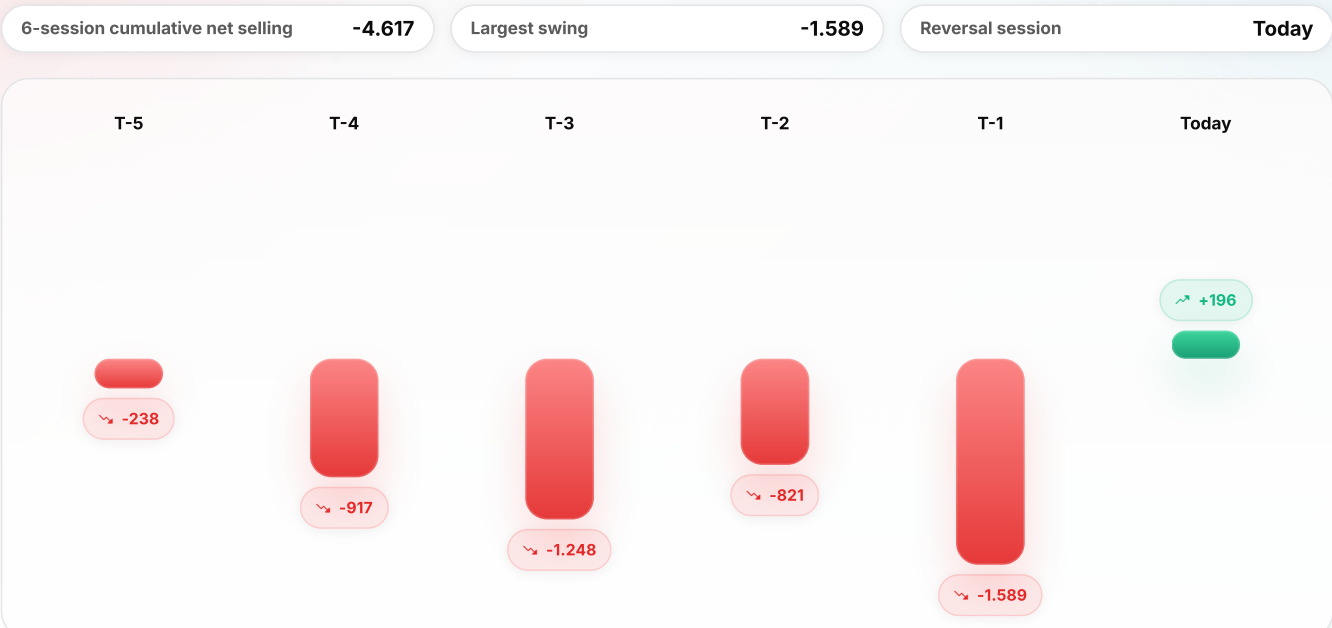
FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET BUY/SELL OVER SIX SESSIONS

Today +196

Unit: VND bn · Green bars indicate net buying, red bars indicate net selling · The midline marks breakeven.

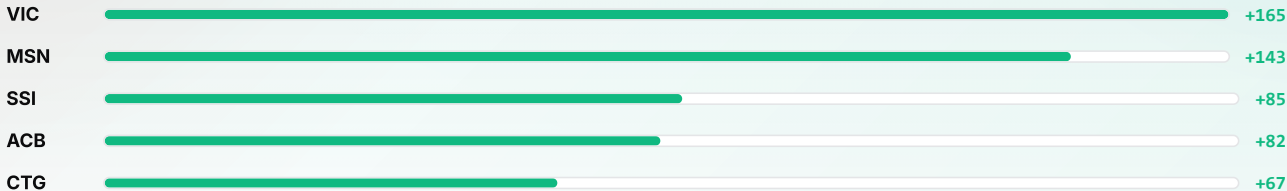


FLOW LEADERS

TOP FOREIGN FLOW TICKERS

Top 5 notable foreign net-bought and net-sold tickers in the session.

TOP 5 NET BUYS



TOP 5 NET SELLS



MONEY FLOW HEATMAP

DOMESTIC & FOREIGN MONEY-FLOW HEATMAP

A one-week view of domestic and foreign flow preferences across key investment themes.

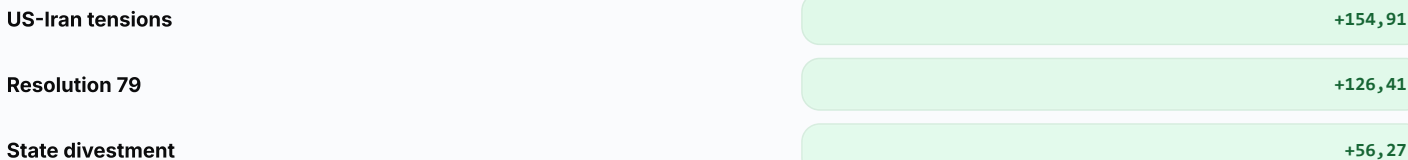
TIME FRAME
May 8, 2026 – May 14, 2026 (1 week)

Place order

Research Center

Foreign Flow Heatmap

1 WEEK





Domestic Flow Heatmap

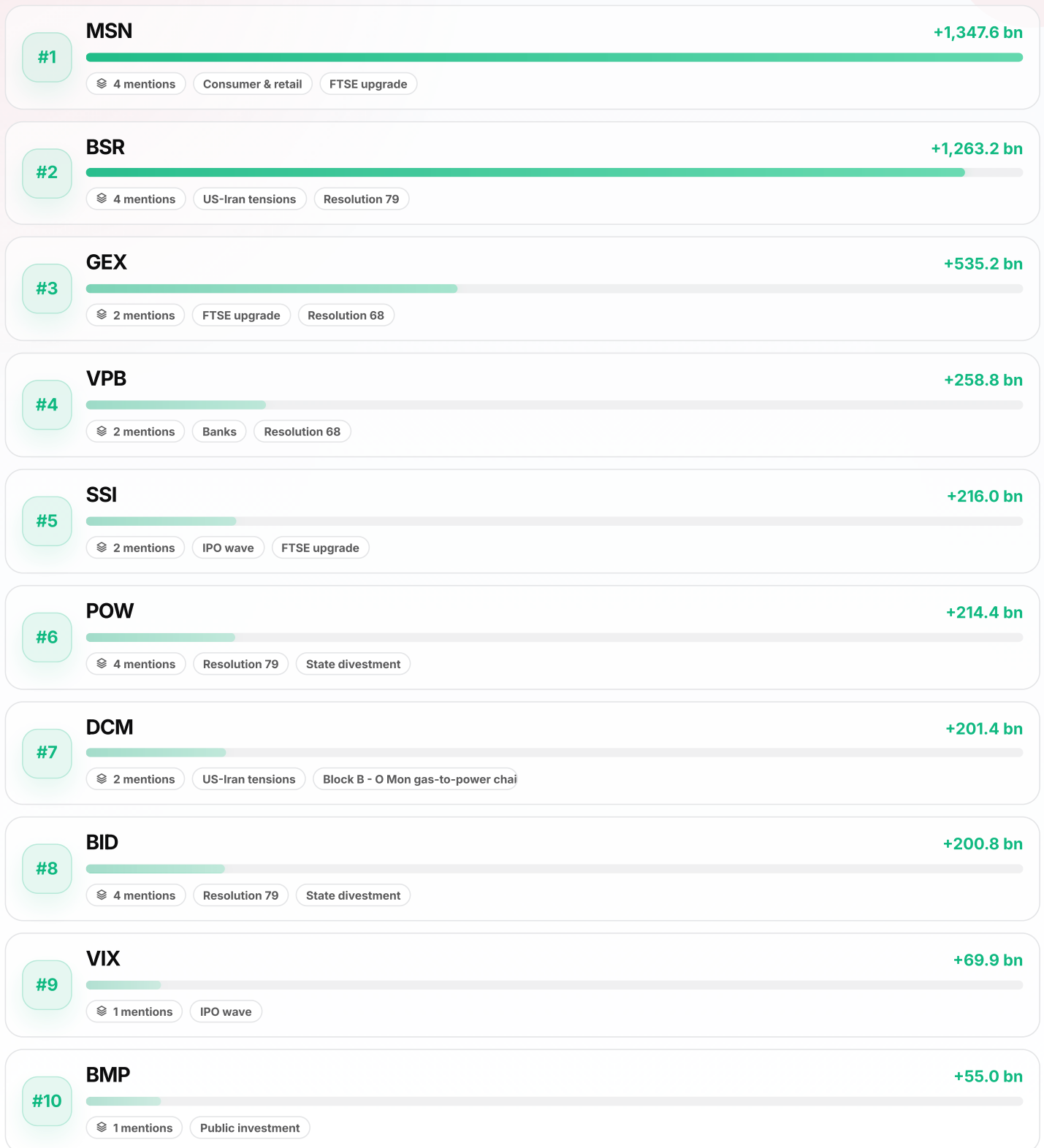
📅 1 WEEK



Top foreign flow

TICKER RANKING

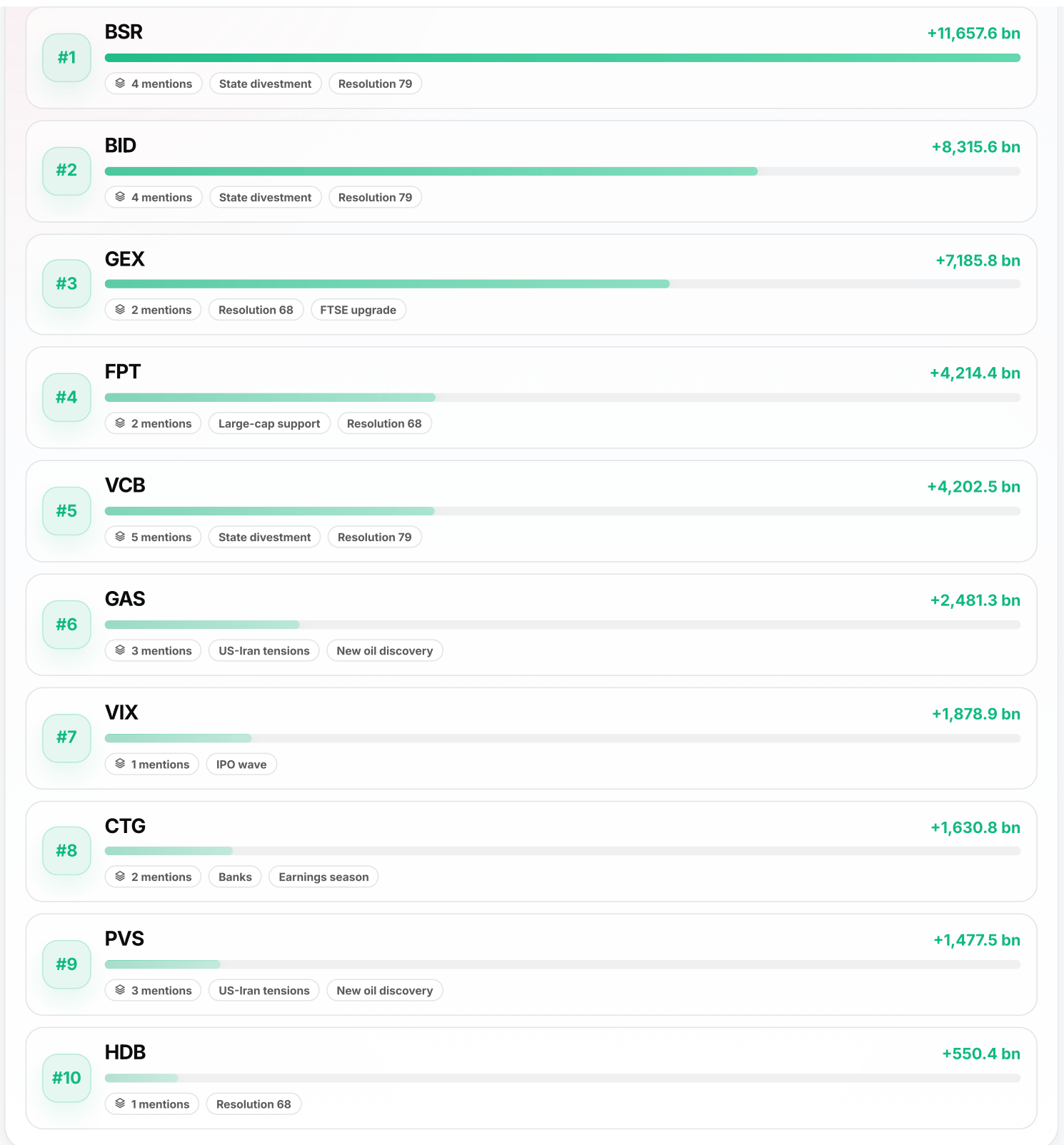
Ticker ranking by cumulative values appearing in the TOP_BUY clusters in the foreign sheet.



Top domestic flow

TICKER RANKING

Ticker ranking by cumulative values appearing in the TOP_BUY clusters in the domestic sheet.



! DISCLAIMER

This market report contains subjective views based on sources believed to be reliable and on detailed, prudent analysis. ASEANSC does not guarantee the absolute accuracy or completeness of these information sources. This report is prepared solely for informational purposes and is not intended to provide any specific offer or recommendation to buy or sell securities. Investors should treat this report as a reference source when making investment decisions and shall bear full responsibility for their own decisions. The views and estimates expressed in our assessment are valid as of the report date and may change without prior notice. This report is copyrighted by ASEANSC. Any reproduction, transfer, or modification without ASEANSC's consent is unlawful.

HEAD OFFICE

Floors 4, 5, 6, 7 – No. 3 Dang Thai Than,
Cua Nam Ward, Hanoi.

Tel: 024 6275 8668

Order hotline: **024 6275 8888**

HO CHI MINH CITY BRANCH

Floor 2 - No. 77-79 Pho Duc Chinh,
Ben Thanh Ward, Ho Chi Minh City.

Tel: 028 3933 0308

Order hotline: **028 3933 0309**



 **DOWNLOAD APP NOW**