

08:00 AM · PRE-MARKET



MORNING BRIEF

Key macro developments and notable signals ahead of the trading session.

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Research Center

U.S. EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	50,063.46	+370.26 (0.75%)
S&P 500 derived	7,501.24	+56.99 (0.77%)
Nasdaq	26,635.22	+232.88 (0.88%)
Small Cap 2000 derived	2,863.09	+19.16 (0.67%)
S&P 500 VIX derived	18.25	+0.99 (5.74%)
S&P/TSX	34,268.27	+226.84 (0.67%)

Sources: Investing.com, Vietstock, ASEANSC compilation

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ASEAN Securities market quick take



KÊNH YOUTUBE



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INTERNATIONAL NEWS



South Korean stocks climb from 7,000 to 8,000 in seven sessions — South Korea's benchmark Kospi index surpassed the 8,000 mark for the first time on 15/05, only seven sessions after reaching 7,000. The move...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026



Honda posts its first loss in 70 years amid EV ambitions — The auto industry's sharp pullback from electric-vehicle plans has created another major casualty, as Honda recorded its first annual loss in...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026



U.S. businesses say they are ready to expand cooperation with China — The U.S. business community viewed positively China's continued efforts to promote high-level opening-up and expressed willingness to expand...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026



Japanese yen weakens too quickly after FX intervention — Rising oil prices amid Middle East instability were cited as a key driver of yen selling and U.S. dollar buying, pushing the currency...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026



Oil prices hover above USD 100/bbl — Oil prices held around USD 100/bbl on 14/05 after the White House said U.S. President Donald Trump and Chinese President Xi Jinping had...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026



Dow Jones gains more than 370 points, retakes 50,000 — U.S. equities advanced on 14/05, with the Dow Jones reclaiming the 50,000 level after positive earnings from Cisco Systems and...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026



Five key takeaways from the Trump–Xi summit — The U.S. and China agreed to deepen cooperation at a summit held in Beijing on 14/05. The meeting was...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026



Renminbi rises to a more than three-year high against the USD — China's renminbi strengthened to its highest level in more than three years against the U.S. dollar on 14/05, after the People's Bank of China...

INTERNATIONAL | Updated at 15:22:52 · 15/05/2026

DOMESTIC NEWS

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How are household businesses performing, based on VCCI's latest survey?

ECONOMY & INVESTMENT | 20 minutes ago



MOIT's new plan: who will receive support for installing rooftop solar?

ECONOMY & INVESTMENT | 3 hours ago



HCMC leads the country in the private-sector economic efficiency index

ECONOMY & INVESTMENT | 3 hours ago



Prime Minister asks for restrictions on new office construction and handling of surplus public properties before 25/5

MACRO | 4 hours ago



Samsung encouraged to expand research into core and leading technologies

NEWS | Today



Delayed flights: will refunds and compensation of up to VND 500,000 be enough to reassure passengers?

NEWS | Today

CORPORATE NEWS

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Long Thanh operating plan still unclear; SASCO guides for lower profit — Despite solid earnings and a long-term strategy targeting average revenue growth of 8%, Southern Airports Services JSC...

CORPORATE | Updated at 15:22:52 · 15/05/2026



EVF announces senior personnel appointments — On 15/5/2026, the Board of Directors of Electricity Finance JSC (EVF) officially announced and handed over appointment decisions...

CORPORATE | Updated at 15:22:52 · 15/05/2026



Next-generation aviation economic hub, with strong growth potential — As the Government targets double-digit growth over 2026–2030, Vietnam is viewed as a bright spot...

CORPORATE | Updated at 15:22:52 · 15/05/2026



LIX to pay a 17% cash dividend for 2025 — Lix Detergent JSC (HOSE: LIX) announced a 2025 cash dividend at a 17% ratio, equivalent to...

CORPORATE | Updated at 15:22:52 · 15/05/2026



Techcombank to spend nearly VND 5tn on 2025 dividends — Techcombank (HOSE: TCB) announced that the record date for its 2025 cash dividend payment is 20/05...

CORPORATE | Updated at 15:22:52 · 15/05/2026



Breaking: FLC establishes an airline with VND 6tn charter capital — Only two weeks after launch, the new airline under the FLC ecosystem raised charter capital from VND 1.5tn to VND 6tn, signaling...

CORPORATE | Updated at 15:22:52 · 15/05/2026



EVENT CALENDAR

Upcoming corporate & macro events

06/2026

17

TMB

Cash dividend 2,842 VND/share

Dividend

06/2026

10

PGI

Cash dividend 1,200 VND/share

Dividend

06/2026

04

HHB

Cash dividend 1,200 VND/share

Dividend

06/2026

09

CCV

Cash dividend 6,316 VND/share

Dividend

06/2026

01

KGM

Cash dividend 420 VND/share

Dividend

06/2026

01

MTH

Cash dividend 800 VND/share

Dividend



MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

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Research Center

VN-INDEX ↘

1,921.60 -0.2%

CHANGE -3.86 điểm

TRADING VALUE VND 20,837.9bn | +VND 2,579.7bn (+14.13%)

Adv 120 Flat 62 Dec 187

VN30 ↘

2,050.58 -0.87%

CHANGE -18.04 điểm

TRADING VALUE VND 12,709.8bn | +VND 1,697.9bn (+15.42%)

Adv 9 Flat 0 Dec 21

HNX-INDEX ↗

257.42 +0.92%

CHANGE +2.35 điểm

TRADING VALUE VND 1,006.8bn | +VND 348.1bn (+52.85%)

Adv Flat Dec

MARKET RECAP

The VN-Index closed down 3.86 points, but the session still carried a constructive undertone as the index rebounded from its intraday low on stronger bargain-hunting demand in the second half of trading. Liquidity improved from the previous session, suggesting that cash flow remained willing to step in on pullbacks and helped the market regain a more balanced tone into the close. That said, pressure from the VN30 basket, with 21 decliners, and negative market breadth on HOSE capped the recovery. While Oil & Gas provided some support, weakness in Seafood and strong foreign net selling of VND 865bn, concentrated in large caps such as HPG, VHM and VIC, created material headwinds and prevented the market from breaking out today.

OUR VIEW

From a technical perspective, the VN-Index continues to preserve its primary uptrend after closing at 1,922, holding firmly above the MA10 and MA20, while RSI (69) and MFI (59) remain supportive, indicating that both price momentum and money flow are still improving. Although selling pressure increased in the latest session, the technical structure has yet to show a negative reversal signal. This supports our base case that the index could continue to trade sideways in a narrow range around the 1,920–1,930 support zone before retesting resistance at 1,940–1,950. In this context, short-term investors should maintain moderate equity exposure, avoid chasing prices, and trade around support/resistance zones, while prioritizing sectors with clear narratives such as state divestment, growth-supportive policy resolutions, the market-upgrade roadmap, and the offshore oil & gas cycle. For medium- to long-term investors, pullbacks toward support remain opportunities to accumulate fundamentally sound, liquid names in Banking, Brokerage, Retail, Public Investment and Oil & Gas.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOW — SIX SESSIONS

Today -865

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

Six-session cumulative net selling **-5.289**

Largest swing **-1.589**

Reversal session **T-1**

T-5

T-4

T-3

T-2

T-1

Today



Sources: Algo, ASEANSC compilation

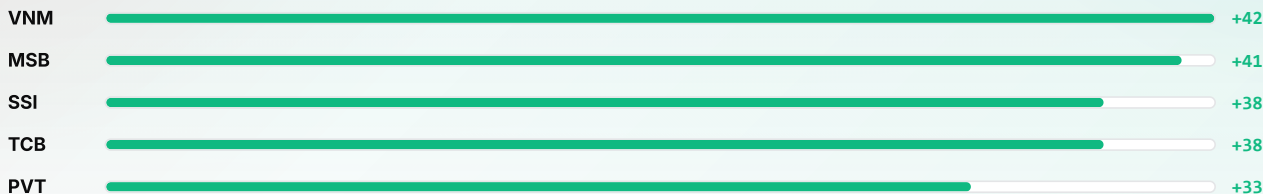
Key takeaway: Foreign investors recorded cumulative net selling of VND 5,289bn over six sessions, with net selling in 5 of the 6 sessions.

FLOW LEADERS

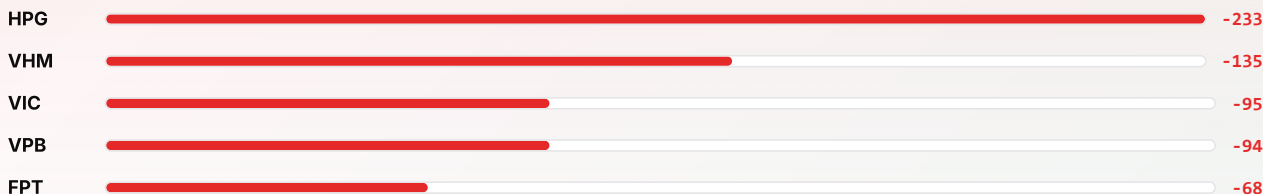
TOP FOREIGN TRADING

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

TOP 5 NET BOUGHT



TOP 5 NET SOLD



15:30 PM · MARKET CLOSE



MARKET CLOSE BRIEF

Market close recap, trend view and key data points of the day.

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INDEX SUMMARY

VN-INDEX ↘
1,921.60 -0.2%
 CHANGE -3.86 điểm
 TRADING VALUE VND 20,837.9bn | +VND 2,579.7bn (+14.13%)

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Adv 120

Flat 62

Dec 187

Adv 9

Flat 0

Dec 21

Adv

Flat

Dec

MARKET RECAP

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VN-INDEX PERFORMANCE OVER THE LATEST SIX SESSIONS

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

■ ADVANCERS
 ■ DECLINERS
 ■ FLAT

08/05

1,915.37

+6.36 điểm

+0.33%

11/05

1,895.50

-19.87 điểm

-1.04%

12/05

1,901.10

+5.6 điểm

+0.3%

13/05

1,898.37

-2.73 điểm

-0.14%

14/05

1,925.46

+27.09 điểm

+1.43%

15/05

1,921.60

-3.86 điểm

-0.2%

Strongest up session

+27.09 pts

Steepest down session

-19.87 pts

Six-session cumulative change

+12.59 điểm

FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions 1/6

FOREIGN NET FLOW — SIX SESSIONS

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

↓ Today -865

Six-session cumulative net selling

-5.289

Largest swing

-1.589

Reversal session

T-1

T-5

T-4

T-3

T-2

T-1

Today



-917



-1,248



-821



-1,589

+151



-865

Sources: Algo, ASEANSC compilation

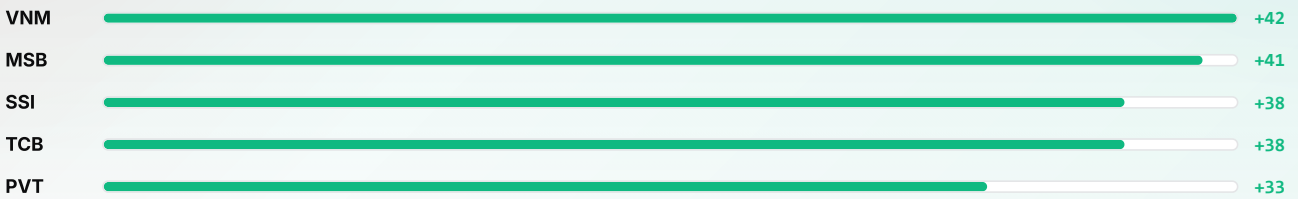
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FLOW LEADERS

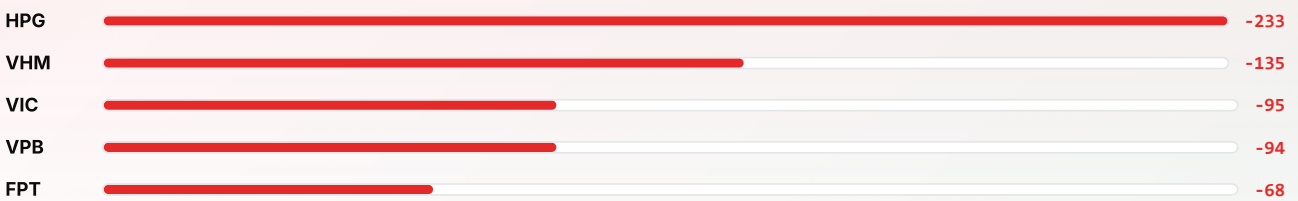
TOP FOREIGN TRADING

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

TOP 5 NET BOUGHT



TOP 5 NET SOLD



MONEY FLOW · HEATMAP

DOMESTIC-FOREIGN MONEY



FLOW HEATMAP

Tracks domestic and foreign flow priorities across major investment themes over a one-week observation window.

TIME FRAME
11/05/2026 – 15/05/2026 (1 week)

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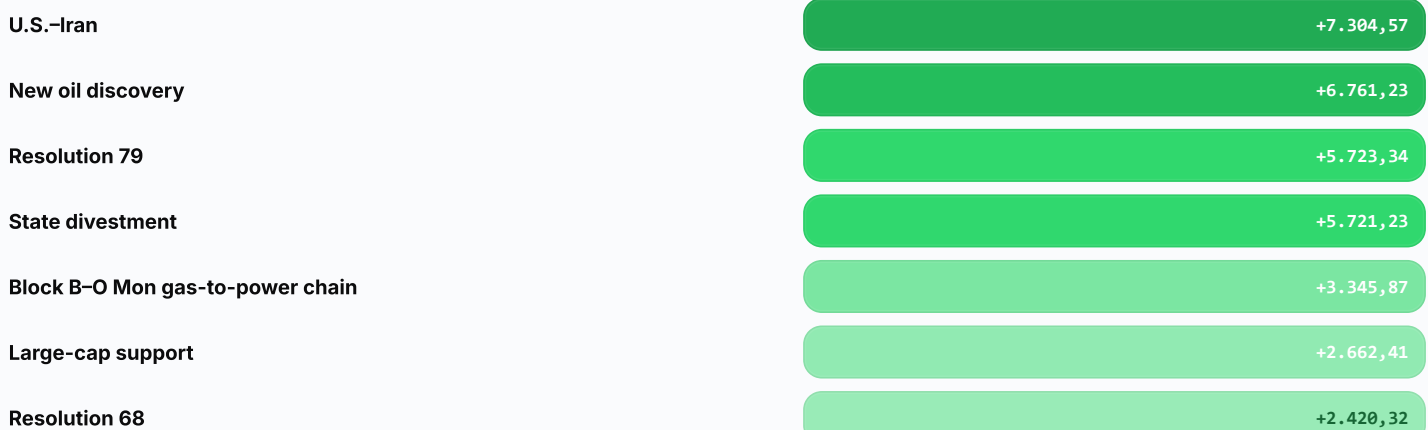
Foreign flow heatmap

🌐 1 WEEK



Domestic flow heatmap

🏠 1 WEEK



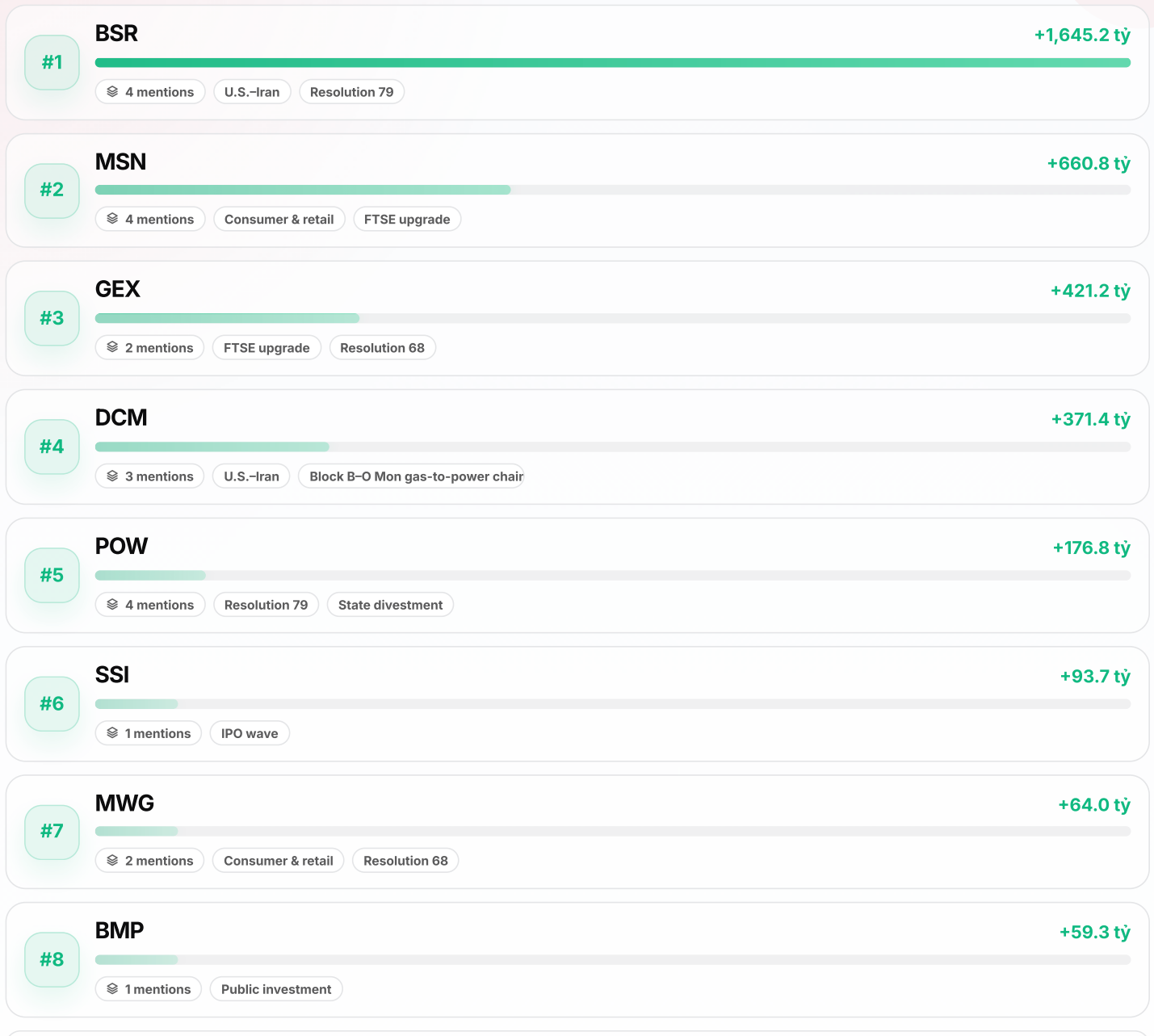


Strong negative Strong positive

Top foreign-flow tickers

TICKER RANKING

Ticker ranking based on cumulative values appearing in TOP_BUY clusters from the foreign-flow sheet.



GVR**+47.1 tÿ**

#9

3 mentions

Resolution 79

State divestment

PHR**+45.2 tÿ**

#10

1 mentions

FDI & industrial real estate

Top domestic-flow tickers

TICKER RANKING

Ticker ranking based on cumulative values appearing in TOP_BUY clusters from the domestic-flow sheet.

BSR**+12,736.4 tÿ**

#1

4 mentions

U.S.-Iran

New oil discovery

GAS**+7,927.8 tÿ**

#2

6 mentions

U.S.-Iran

New oil discovery

FPT**+4,475.4 tÿ**

#3

2 mentions

Large-cap support

Resolution 68

GEX**+4,122.8 tÿ**

#4

2 mentions

Resolution 68

FTSE upgrade

BID**+2,847.2 tÿ**

#5

4 mentions

Resolution 79

State divestment

PVS**+2,428.8 tÿ**

#6

3 mentions

U.S.-Iran

New oil discovery

TCB**+1,157.4 tÿ**

#7

2 mentions

Resolution 68

Banking

HCM**+718.8 tÿ**

#8

2 mentions

IPO wave

FTSE upgrade

PVD**+614.9 tÿ**

#9

1 mentions

Block B-O Mon gas-to-power chair

DCM**+543.3 tÿ**

#10

1 mentions

FTSE upgrade

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