

🕒 08:00 AM · PRE-MARKET



MORNING BRIEF

Macro developments and key signals before the trading session.

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🌐 US EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	51,564.70	+72.15 (0.14%)
S&P 500 derived	7,500.58	+80.48 (1.08%)
Nasdaq	26,517.93	+496.28 (1.91%)
Small Cap 2000 derived	2,979.77	+61.79 (2.12%)
S&P 500 VIX derived	16.86	+0.46 (2.8%)
S&P/TSX	34,969.26	-155.85 (-0.44%)

Source: Investing.com, Vietstock, ASEANSC Research

📺 ASEAN DIGITAL SECURITIES YOUTUBE CHANNEL

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FEATURED VIDEO

ASEAN Securities quick market update



YOUTUBE CHANNEL



ASEAN SHORTS

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🌐 GLOBAL NEWS



Managing conflicts of interest in securities brokerage: Lessons from more advanced emerging Asian markets — As stock markets mature, regulators tend to increase oversight, creating legal pressure for brokerage firms...

GLOBAL NEWS | 🕒 Updated at 15:34:42 · 19/06/2026



Singapore regains the title of the world's most competitive economy — Singapore returned to the top of IMD's 2026 global competitiveness ranking, supported by institutional quality and corporate efficiency...

GLOBAL NEWS | 🕒 Updated at 15:34:42 · 19/06/2026



Bank of England keeps policy rate unchanged at 3.75% — The BoE kept its benchmark rate unchanged, in line with market expectations, amid still-elevated inflation, a mild economic slowdown and continued energy-price pressure...

GLOBAL NEWS | Updated at 15:34:42 · 19/06/2026



Is the record 2026 IPO wave a market-top signal or a capital reallocation? — The wave of equity issuance worth hundreds of billions of USD in late 2025 and 2026 globally and in Vietnam has raised concerns that markets may be nearing a peak...

GLOBAL NEWS | Updated at 15:34:42 · 19/06/2026



Global gold falls toward USD4,200 as the Fed signals rate hikes — Gold prices declined on June 18 after the US Federal Reserve delivered a more hawkish policy message, lifting the US dollar...

GLOBAL NEWS | Updated at 15:34:42 · 19/06/2026



Oil prices were nearly flat — Oil prices moved only slightly on June 18 after US Vice President JD Vance said vessels carrying more than 12 million barrels of oil had passed through the strait...

GLOBAL NEWS | Updated at 15:34:42 · 19/06/2026



S&P 500 rebounds strongly on chip stocks, erasing the Fed-meeting shock — US equities gained on June 18 as investors rotated back into technology and semiconductor stocks, helping the market recover...

GLOBAL NEWS | Updated at 15:34:42 · 19/06/2026



US-Iran agreement helps US gasoline prices fall below USD4/gallon — Average US gasoline prices dropped below USD4/gallon for the first time in three months as global oil prices cooled following a US-Iran agreement...

GLOBAL NEWS | Updated at 15:34:42 · 19/06/2026

DOMESTIC NEWS

 Trade Now



Civil Aviation Authority requests planning review to avoid waste in Chu Lai Airport expansion

ECONOMY - INVESTMENT | 58 minutes ago



Use of intermediary companies to conceal corruption-related cash flows detected

MACRO | 2 hours ago



FDI mega projects must commit to a core-technology transfer roadmap

ECONOMY - INVESTMENT | 3 hours ago



Prime Minister Le Minh Hung meets Russian President Vladimir Putin

NEWS | Today



Sandbox for the special urban model

NEWS | Today



Low-cost cars from Indonesia rapidly enter Vietnam

NEWS | Today

CORPORATE NEWS

 Trade Now



Madame Nguyen Thi Nga re-elected to the Central Executive Committee of the Vietnam Women's Union, 14th tenure — The 14th National Women's Congress elected Nguyen Thi Nga, Chairwoman of BRG Group and Acting Chairwoman of the Vietnam Private Entrepreneurs Association...



ACV has a new chairman; Noi Bai T2 terminal reaches breakeven threshold — At the AGM on the morning of June 19, Airports Corporation of Vietnam's management (UPCoM: ACV) shared several notable updates...

CORPORATE NEWS | Updated at 15:34:42 · 19/06/2026



NVL seeks shareholder approval to issue more than VND1.7bn shares for debt restructuring — Novaland is seeking shareholder approval to add a plan to offer nearly 800.7mn shares to existing shareholders to support remedies for related issues...

CORPORATE NEWS | Updated at 15:34:42 · 19/06/2026



ACV estimates 1H pretax profit at nearly VND5.9tn, fulfilling 84% of its plan — At the AGM on the morning of June 19, Airports Corporation of Vietnam's management (UPCoM: ACV) said the company had achieved 84% of its plan...

CORPORATE NEWS | Updated at 15:34:42 · 19/06/2026



WinMart+ reaches 5,000 stores, accelerating modernization of Vietnam's retail infrastructure — On June 18, 2026, WinMart+ officially opened its 5,000th store nationwide in Meo Vac commune, Tuyen Quang province, marking a meaningful milestone...

CORPORATE NEWS | Updated at 15:34:42 · 19/06/2026



SGN AGM: Tough period is over; Long Thanh contribution expected from 2027 — On the morning of June 18, Saigon Ground Services JSC's 2026 AGM (SAGS, HOSE: SGN) was held as the global aviation sector continued to face...

CORPORATE NEWS | Updated at 15:34:42 · 19/06/2026



EVENTS CALENDAR

Upcoming corporate and macro events

08/2026

25**BDW**

Cash dividend payment of 1,250 VND/share

Dividend

08/2026

12**HDW**

Cash dividend payment of 820 VND/share

Dividend

08/2026

04**UDL**

Cash dividend payment of 5,000 VND/share

Dividend

07/2026

20**VBC**

Cash dividend payment of 1,800 VND/share

Dividend

08/2026

06**DNE**

Cash dividend payment of 600 VND/share

Dividend

07/2026

31**ADS**

Cash dividend payment of 1,000 VND/share

Dividend

12:00 PM · MID-SESSION



MID-SESSION UPDATE

Morning market pulse, money flow and key index moves.

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VN-INDEX



VN30



HNX-INDEX



1,824.53 -0.32%

CHANGE -5.94 pts

GTGD VND15,339.0bn | VND+1,134.6bn (+7.99%)

Advancers 84 Unchanged 66 Decliners 205

1,963.57 -0.19%

CHANGE -3.65 pts

GTGD VND9,098.5bn | VND+904.5bn (+11.04%)

Advancers 7 Unchanged 3 Decliners 20

324.83 -3.37%

CHANGE -11.33 pts

GTGD VND863.3bn | VND+66.4bn (+8.33%)

Advancers Unchanged Decliners

MARKET RECAP

VN-Index closed nearly 6 points lower, but intraday trading still showed a notable recovery effort as bottom-fishing demand strengthened in the second half, allowing the index to finish above its intraday average level. Although liquidity improved slightly and several sectors ended in positive territory, the market remained under correction pressure from weakness in the VN30, where 20 stocks declined, alongside heavy foreign net selling of nearly VND1,633bn concentrated in large caps such as VHM, FPT and STB. Market breadth also leaned negative with 205 decliners, especially in seaports, industrial property, oil & gas and insurance, indicating that cautious sentiment still prevailed despite domestic money flow attempting to support the index during pullbacks.

OUR VIEW

From a technical perspective, VN-Index is moving in a neutral state after closing at 1,825 pts, positioned between MA10 and MA20, while RSI(14) stood at 48. This reflects rising selling pressure, but not yet enough to break the short-term support structure. With money flow weakening as shown by MFI at 33, the market is likely to remain range-bound around 1,820–1,830 pts before a clearer trend is established. The optimal strategy is to maintain a medium portfolio weighting and avoid chasing rebounds. Short-term investors should trade around the 1,820–1,830 support zone and the 1,840–1,850 resistance zone, prioritizing stocks with specific catalysts such as state divestment, market-upgrade expectations, economic-development resolutions or the offshore cycle. Meanwhile, medium- and long-term investors may use pullbacks toward support zones to accumulate gradually in fundamentally solid and liquid sectors such as banks, securities, retail, public investment and oil & gas.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOWS OVER SIX SESSIONS

Today -1.516

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

Six-session cumulative net selling -3.097

Largest swing +4.192

Reversal session T-4



Source: Algo, ASEANSC Research

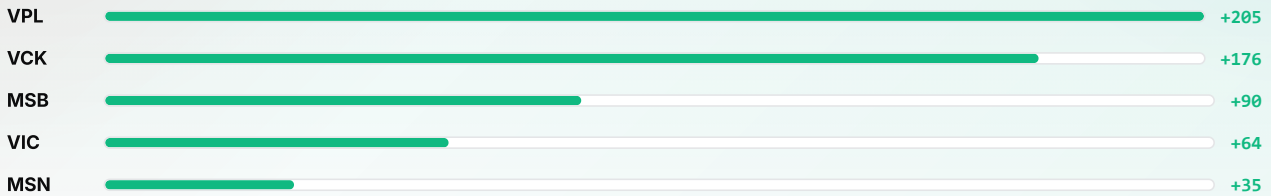
Key takeaway: Foreign investors posted cumulative net selling of VND3,097bn over six sessions, with net selling in 5/6 sessions.

 FLOW LEADERS

 TOP FOREIGN FLOW TICKERS

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

TOP 5 NET BUYS



TOP 5 NET SELLS



 15:30 PM · MARKET CLOSE



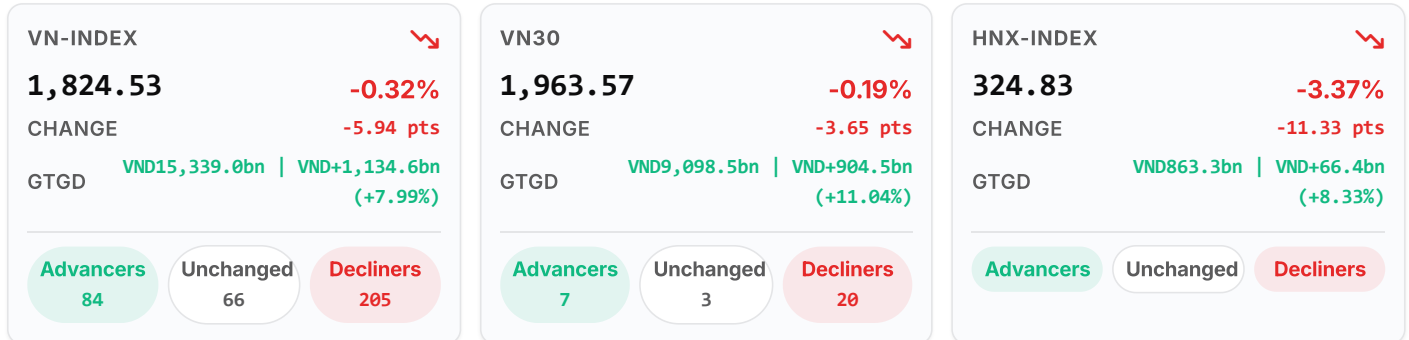
MARKET CLOSE

Session wrap, trend view and key market data of the day.

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INDEX SUMMARY



 MARKET RECAP

VN-Index closed nearly 6 points lower, but intraday trading still showed a notable recovery effort as bottom-fishing demand strengthened in the second half, allowing the index to finish above its intraday average level. Although liquidity improved slightly and several sectors ended in positive territory, the market remained under correction pressure from weakness in the VN30, where 20 stocks declined, alongside heavy foreign net selling of nearly VND1,633bn concentrated in large caps such as VHM, FPT and STB. Market breadth also leaned negative with 205 decliners, especially in seaports, industrial property, oil & gas and insurance, indicating that cautious sentiment still prevailed despite domestic money flow attempting to support the index during pullbacks.

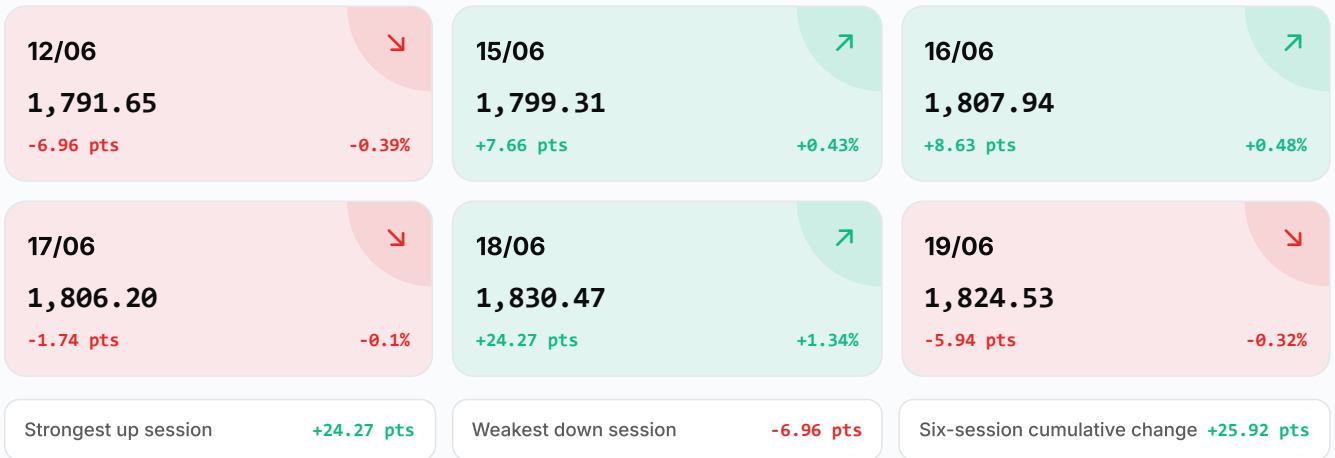
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VN-INDEX MOVEMENT OVER THE LAST SIX SESSIONS

Each tile represents one recent session | Showing close and change versus the previous session

■ ADVANCERS
 ■ DECLINERS
 ■ SIDEWAYS



FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOWS OVER SIX SESSIONS

Today -1.516

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

Six-session cumulative net selling **-3.097**
 Largest swing **+4.192**
 Reversal session **T-4**



-482

-339

-3.128

-1.824

-1.516

Source: Algo, ASEANSC Research

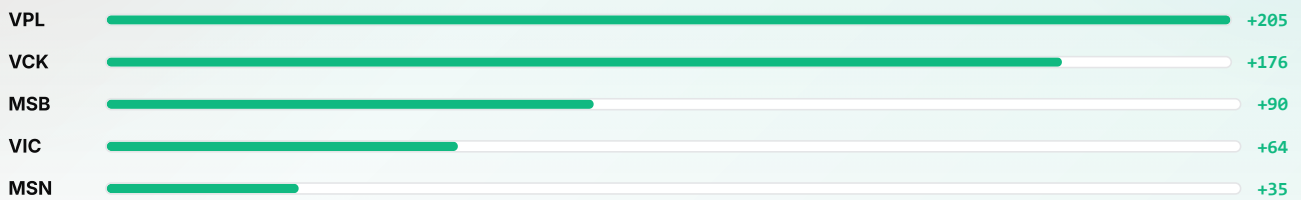
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FLOW LEADERS

TOP FOREIGN FLOW TICKERS

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TOP 5 NET BUYS



TOP 5 NET SELLS



MONEY FLOW · HEATMAP

DOMESTIC-FOREIGN MONEY FLOW HEATMAP

TIME FRAME 15/06/2026 - 19/06/2026 (1 week)

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Ranking domestic and foreign money-flow priorities across key investment themes over a one-week observation window.

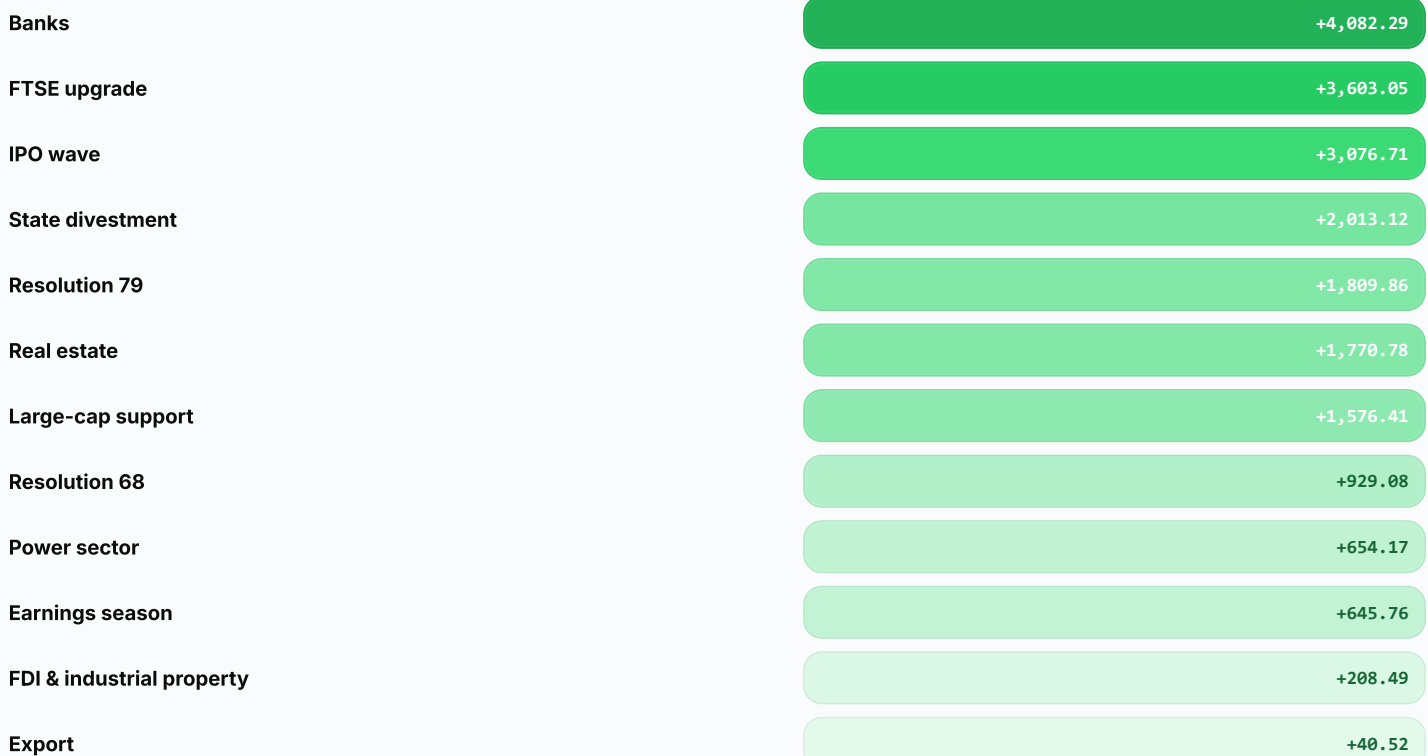
Foreign Money Flow Heatmap

📅 1 WEEK



Domestic Money Flow Heatmap

📅 1 WEEK



Block B – O Mon gas-to-power chain

-50.04

New oil discovery

-314.88

US-Iran

-555.27

Consumer & retail

-587.67

Public investment

-1,046.94

Strong negative  Strong positive

Top foreign-flow tickers

TICKER RANKING

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

#1

HPG

+VND585.4bn

2 mentions

Public investment

FTSE upgrade

#2

MWG

+VND500.0bn

2 mentions

Consumer & retail

Resolution 68

#3

POW

+VND211.2bn

4 mentions

Power sector

Block B – O Mon gas-to-power chain

#4

TCX

+VND188.8bn

2 mentions

IPO wave

FTSE upgrade

#5

PVS

+VND186.3bn

3 mentions

Block B – O Mon gas-to-power chain

New oil discovery

#6

GAS

+VND174.0bn

5 mentions

New oil discovery

US-Iran

#7

PVD

+VND171.3bn

3 mentions

Block B – O Mon gas-to-power chain

New oil discovery

#8

GMD

+VND170.0bn

2 mentions

Export

Resolution 68

#9

PNJ

+VND166.0bn

2 mentions

Consumer & retail

Resolution 68

#10

VCK

+VND155.6bn

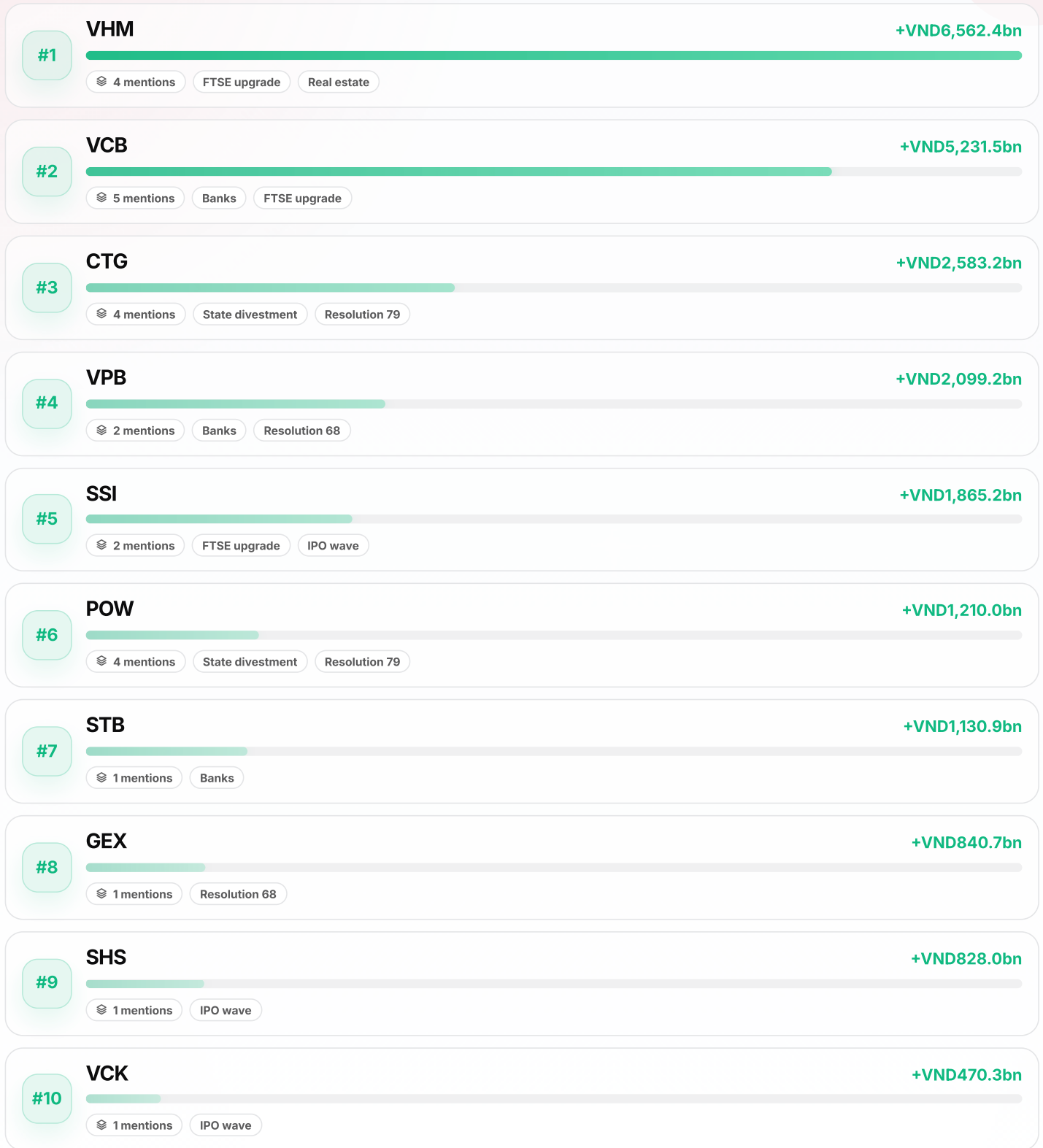
1 mentions

IPO wave

Top domestic-flow tickers

TICKER RANKING

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



DISCLAIMER

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