

08:00 AM · PRE-MARKET



MORNING BRIEF

Macro developments and key signals before the trading session.

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Research Center

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	17.63	+0.85 (5.07%)
S&P/TSX	34,857.34	-111.92 (-0.32%)

Source: Investing.com, Vietstock, ASEANSC Research

ASEAN DIGITAL SECURITIES YOUTUBE CHANNEL

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ASEAN Securities quick market update



YOUTUBE CHANNEL



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GLOBAL NEWS



What happens if the Fed says less? — Major investors are warning that Fed Chair Kevin Warsh's preference for using fewer monetary-policy guidance tools could leave markets less prepared for policy shifts...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026



The U.S. and Iran outline a path toward a final agreement — The U.S. and Iran made progress in talks in Switzerland on June 22, aiming for a final agreement within 60 days...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026

**Policy room: From London to Southeast Asia —**

The Bank of England kept its policy rate unchanged at 3.75%, while central banks in Jakarta and Manila raised rates, highlighting diverging policy room across markets...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026

**India in no hurry to finalize trade deal with U.S. amid tariff hurdles —**

Despite early agreement on a preliminary framework, negotiations remain protracted due to differences over tariffs, market access, and implementation mechanisms...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026

**U.S. fines Bosch USD36mn for violating Huawei sanctions —**

During 2020–2024, Bosch carried out more than 100 shipments of sensors and software used in mobile phones, with total value exceeding USD70mn...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026

**Trump threatens to charge fees on vessels passing through the Strait of Hormuz —**

U.S. President Donald Trump said he would not charge maritime fees in the Strait of Hormuz during a 60-day ceasefire, but threatened separate charges afterward...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026

**Auto industry pays the price for rushing into the EV bet —**

Automakers' revenue remains high, but financial reports are increasingly marked by losses. Behind tens of billions of dollars in asset write-downs is a painful transition...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026

**HOT: Iran's military unexpectedly announces blockade of the Strait of Hormuz —**

On the evening of June 20 (Vietnam time), Iran's central military command announced a blockade of the Strait of Hormuz following Israeli attacks in the south...

GLOBAL NEWS | Updated at 15:36:32 · 22/06/2026

DOMESTIC NEWS

[Trade Now](#)

**UOB: Business confidence in Vietnam rebounds strongly as firms accelerate AI adoption and expand across ASEAN**

ECONOMY - INVESTMENT | 21 minutes ago

**Ministry of Home Affairs requests review and policy development for the silver economy to 2030, vision to 2045**

MACRO | 43 minutes ago

**Vietnam is one of the priority markets for the U.S. International Development Finance Corporation**

ECONOMY & INVESTMENT | 1 hours ago

**Techcombank CEO Jens Lottner: Vietnam continues to maintain its growth foundation amid global volatility**

MACRO | 2 hours ago

**From July 15, toll collection to resume on remaining North–South Expressway sections**

ECONOMY - INVESTMENT | 4 hours ago

**Trade deficit rises by USD2.8bn in just half a month**

NEWS | Today

CORPORATE NEWS

[Trade Now](#)

**CC1 raises nearly VND852bn from a private share placement —**
CC1 has completed a private share offering, raising nearly VND852bn to fund**Vinamilk to pay nearly VND3,900bn in final 2025 dividend; SCIC estimated to receive nearly VND1.4tn —**
Vietnam Dairy Products JSC (Vinamilk, HOSE: VNM) announced the record

infrastructure projects. At the same time, CC1 shares officially left...

CORPORATE NEWS | Updated at 15:36:32 · 22/06/2026



VinaPrint to spend VND10bn on dividends — VinaPrint JSC (UPCoM: VPR) announced the record date for its 2025 cash dividend. The ex-rights date is August 4.

CORPORATE NEWS | Updated at 15:36:32 · 22/06/2026

date for the remaining 2025 cash dividend. The ex-rights date is June 26.

CORPORATE NEWS | Updated at 15:36:32 · 22/06/2026



Thien Long Group unexpectedly halts Indonesia project: Reshaping its global expansion strategy? — On June 19, the Board of Directors of Thien Long Group JSC (HOSE: TLG) approved Resolution No. 08/2026/Board Resolution with two key decisions: changing the auditor...

CORPORATE NEWS | Updated at 15:36:32 · 22/06/2026



HAR AGM: Retaining earnings to resolve project bottlenecks — HAR's 2026 AGM approved a revenue target of VND60bn, 2.5x higher than...

CORPORATE NEWS | Updated at 15:36:32 · 22/06/2026



Decree 200 tightens management of offshore corporate bond issuance — Newly issued Decree 200/2026/Government Decree introduces stricter rules for international corporate bond offerings to strengthen...

CORPORATE NEWS | Updated at 15:36:32 · 22/06/2026



EVENTS CALENDAR

Upcoming corporate and macro events

08/2026

25

NBC

Cash dividend of VND600/share

Dividend

07/2026

30

CTR

Cash dividend of VND1,500/share

Dividend

07/2026

30

IBD

Cash dividend of VND500/share

Dividend

07/2026

15

ULG

Cash dividend of VND250/share

Dividend

07/2026

28

VPW

Cash dividend of VND202/share

Dividend

07/2026

22

VHM

Cash dividend of VND6,000/share

Dividend

12:00 PM · MID-SESSION



MID-SESSION UPDATE

Morning market pulse, money flow and key index moves.

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[Research Center](#)

VN-INDEX ↗

1,857.91 +1.83%

CHANGE +33.38 pts

TURNOVER 12,261.4bn | -3,141.0bn (-20.39%)

Advancers
133

Unchanged
49

Decliners
183

VN30 ↗

1,980.13 +0.84%

CHANGE +16.56 pts

TURNOVER 6,951.7bn | -2,127.8bn (-23.44%)

Advancers
15

Unchanged
3

Decliners
12

HNX-INDEX ↘

321.06 -1.16%

CHANGE -3.77 pts

TURNOVER 706.8bn | -160.6bn (-18.51%)

Advancers

Unchanged

Decliners

↗ MARKET RECAP

The VN-Index stayed in positive territory throughout today's session and closed up an impressive 33+ points near the intraday high, indicating that proactive demand was firmly in control. Gains were led by the Vingroup complex and supported by positive spillovers from Power, Oil & Gas, and Banking. Foreign investors also helped reinforce market sentiment through net buying in key large-cap names such as VIC, BID, and VHM. However, the market picture was not uniformly strong, as turnover declined noticeably, reflecting persistent caution, while correction pressure in Seaports and Industrial Parks caused market breadth to tilt toward decliners. This highlighted clear divergence despite the strong recovery in the headline index.

🌐 OUR VIEW

The VN-Index is showing a cautious technical recovery signal after closing near 1,858 points, establishing a neutral posture above MA10 and MA20 with RSI(14) improving to 57, although actual money flow remains divergent as reflected by a modest MFI of 40. While buyers currently hold the short-term advantage and have helped the index sustain its rebound, the lack of confirmation between price action and momentum suggests that the uptrend is not yet firmly established. Investors should therefore closely monitor the index's reaction around the 1,870–1,880 resistance zone for trend confirmation. Under our base case, the market is likely to move sideways in a narrow range early in the session before establishing a clearer direction toward the close. The optimal strategy is to maintain a medium portfolio weighting, avoid chasing rallies, and trade tactically within the 1,850–1,880 range, with priority given to groups with idiosyncratic catalysts such as State divestments, market upgrade prospects, economic development resolutions, and the offshore oil & gas cycle. Medium- to long-term investors may use pullbacks toward medium-term support zones to accumulate fundamentally sound and liquid stocks in Banking, Securities, Retail, Public Investment, and Oil & Gas.

📊 FOREIGN FLOW SPOTLIGHT

📈 Net-buying sessions 2/6

📊 FOREIGN NET FLOWS OVER SIX SESSIONS

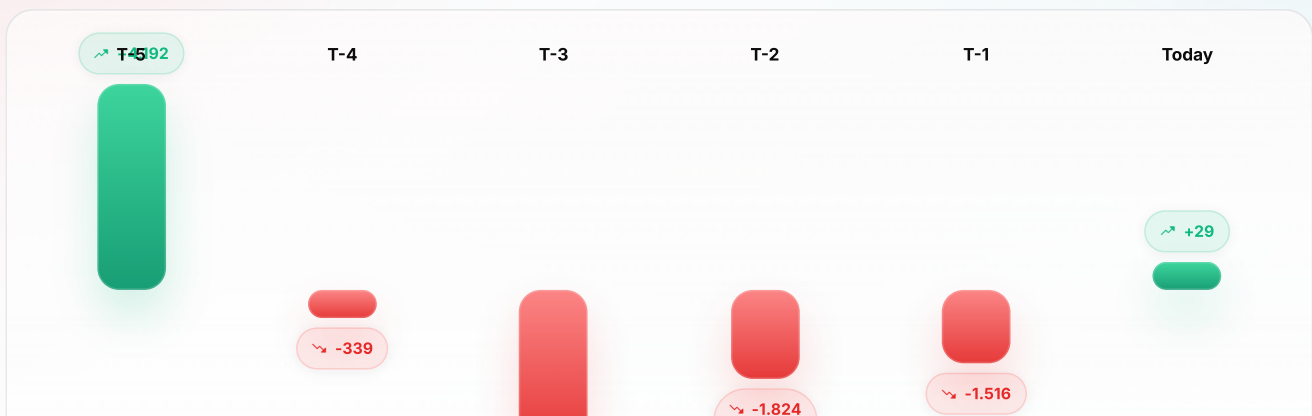
📈 Today +29

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

Six-session cumulative net selling **-2.586**

Largest swing **+4.192**

Reversal session **Today**



-3.128

Source: Algo, ASEANSC Research

Key takeaway: Foreign investors recorded cumulative net selling of VND2,586bn over six sessions, with net selling in four of the six sessions.

FLOW LEADERS

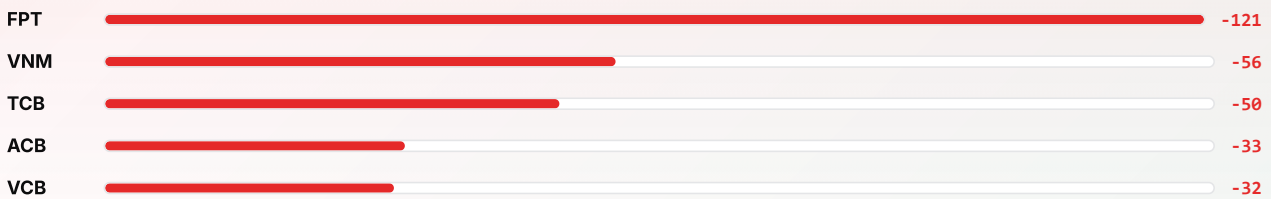
TOP FOREIGN FLOW TICKERS

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

VN-INDEX

1,857.91

+1.83%

CHANGE

+33.38 pts

TURNOVER

12,261.4bn | -3,141.0bn (-20.39%)

Advancers 133

Unchanged 49

Decliners 183

VN30

1,980.13

+0.84%

CHANGE

+16.56 pts

TURNOVER

6,951.7bn | -2,127.8bn (-23.44%)

Advancers 15

Unchanged 3

Decliners 12

HNX-INDEX

321.06

-1.16%

CHANGE

-3.77 pts

TURNOVER

706.8bn | -160.6bn (-18.51%)

Advancers

Unchanged

Decliners

MARKET RECAP

The VN-Index stayed in positive territory throughout today's session and closed up an impressive 33+ points near the intraday high, indicating that proactive demand was firmly in control. Gains were led by the Vingroup complex and supported by positive spillovers from Power, Oil & Gas, and Banking. Foreign investors also helped reinforce market sentiment through net buying in key large-cap names such as VIC, BID, and VHM. However, the market picture was not uniformly strong, as turnover declined noticeably, reflecting persistent caution, while correction pressure in Seaports and Industrial Parks caused market breadth to tilt toward decliners. This highlighted clear divergence despite the strong recovery in the headline index.

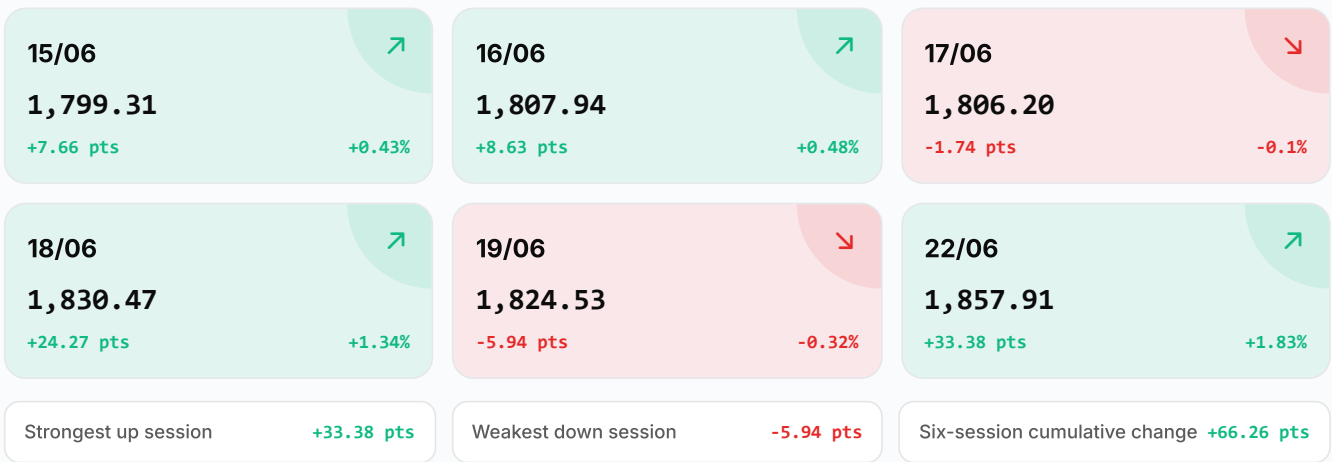
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VN-INDEX MOVEMENT OVER THE LAST SIX SESSIONS

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

● ADVANCERS ● DECLINERS ● SIDEWAYS



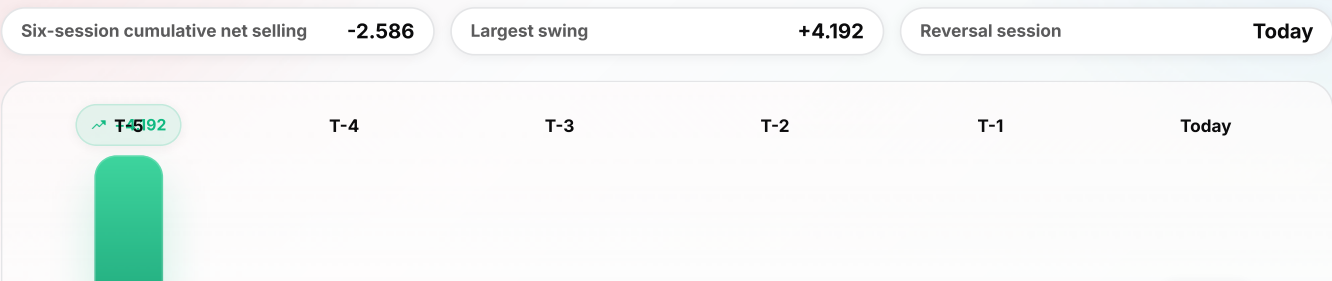
FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions 2/6

FOREIGN NET FLOWS OVER SIX SESSIONS

↑ Today +29

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



+29

-339

-3.128

-1.824

-1.516

Source: Algo, ASEANSC Research

Key takeaway: Foreign investors recorded cumulative net selling of VND2,586bn over six sessions, with net selling in four of the six sessions.

FLOW LEADERS

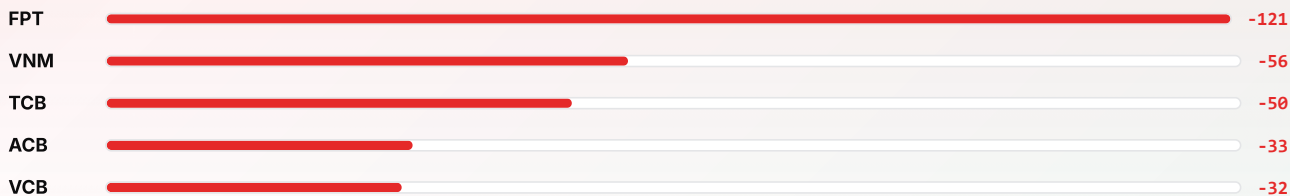
TOP FOREIGN FLOW TICKERS

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

TOP 5 NET BUYS



TOP 5 NET SELLS



MONEY FLOW · HEATMAP

DOMESTIC-FOREIGN MONEY FLOW HEATMAP



TIME FRAME 16/06/2026 – 22/06/2026 (1 week)

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Ranking domestic and foreign money-flow priorities across key investment themes over a

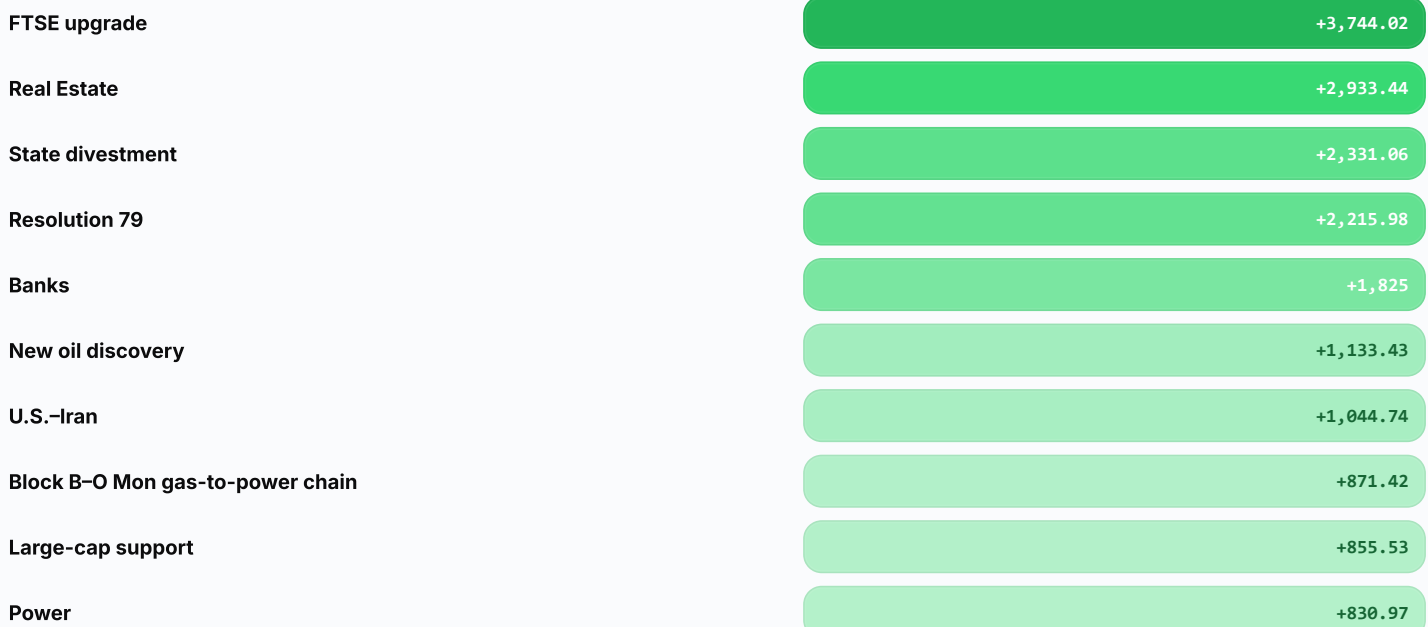
Foreign Money Flow Heatmap

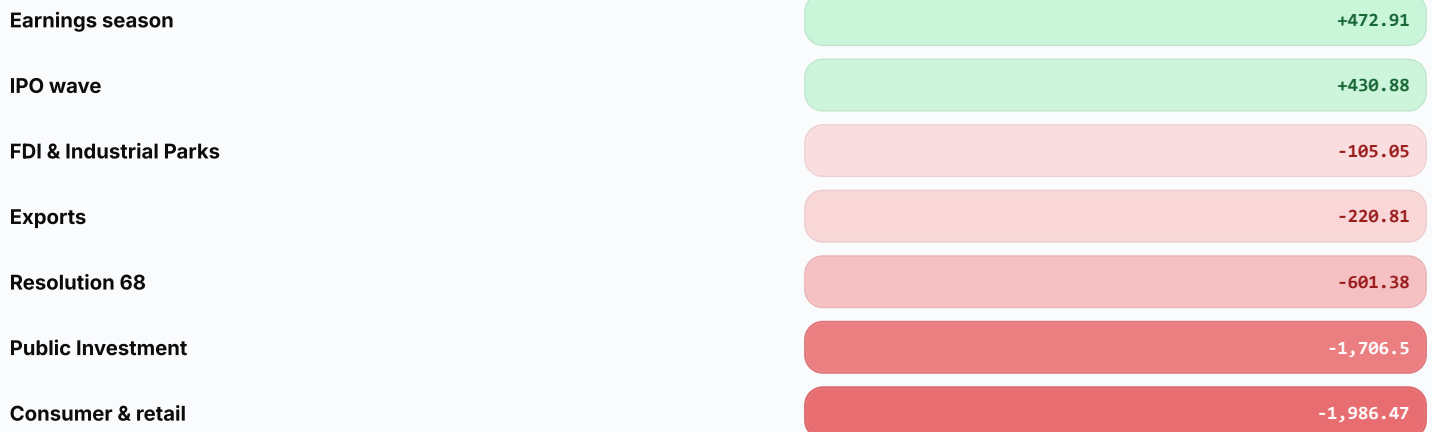
📅 1 WEEK



Domestic Money Flow Heatmap

📅 1 WEEK



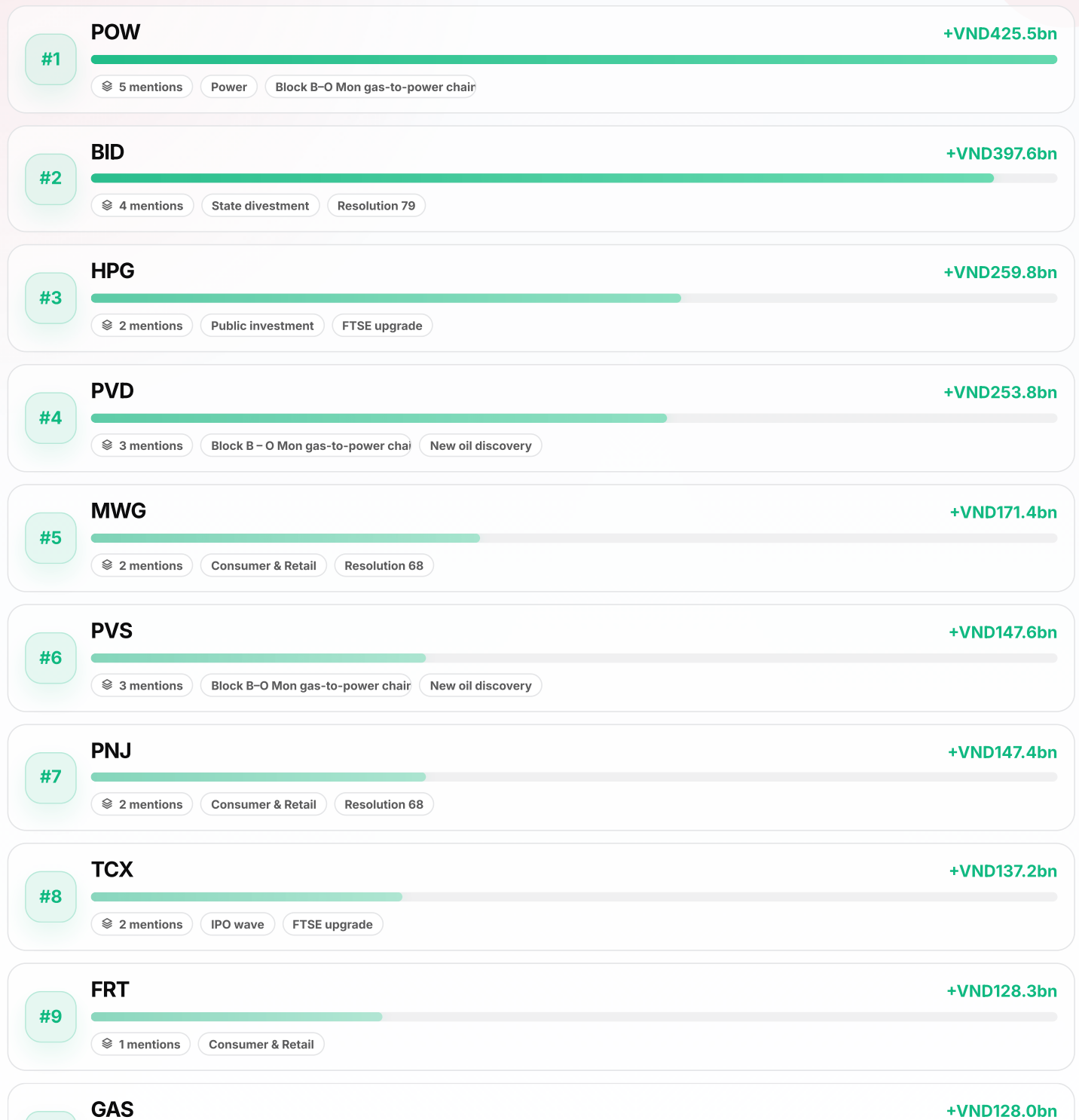


Strong negative  Strong positive

Top foreign-flow tickers

TICKER RANKING

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



#10

5 mentions

New oil discovery

US-Iran

Top domestic-flow tickers

TICKER RANKING

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

#1

VHM

+VND13,398.8bn

4 mentions

FTSE upgrade

Real estate

#2

VCB

+VND4,099.0bn

5 mentions

FTSE upgrade

State divestment

#3

CTG

+VND1,891.6bn

4 mentions

State divestment

Resolution 79

#4

BSR

+VND1,547.6bn

4 mentions

State divestment

Resolution 79

#5

GEX

+VND1,519.2bn

2 mentions

FTSE upgrade

Resolution 68

#6

VPB

+VND1,227.8bn

2 mentions

Banks

Resolution 68

#7

PVS

+VND1,150.8bn

3 mentions

New oil discovery

U.S.-Iran

#8

PVD

+VND1,073.1bn

3 mentions

New oil discovery

U.S.-Iran

#9

POW

+VND728.0bn

2 mentions

Block B-O Mon gas-to-power chair

Power

#10

STB

+VND664.8bn

1 mentions

Banks

DISCLAIMER

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