

🕒 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	51,712.71	+148.01 (0.29%)
S&P 500 derived	7,472.79	-27.79 (-0.37%)
Nasdaq	26,166.60	-351.33 (-1.32%)
Small Cap 2000 derived	3,004.40	+24.63 (0.83%)
S&P 500 VIX derived	20.26	+2.98 (17.25%)
S&P/TSX	35,002.18	+144.84 (0.42%)

Source: Investing.com, Vietstock, ASEANSC Research

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🌐 GLOBAL NEWS



South Korean stocks tumble more than 9% from record high, triggering circuit breaker — South Korean stocks fell sharply from record highs as



JD.com boss: Robots will eventually replace 700,000 delivery workers — The head of one of China's largest e-commerce groups warned that

investors took profits in major semiconductor names, amid growing concerns...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026

hundreds of thousands of delivery workers could eventually be replaced by...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026



SpaceX loses USD400bn in market value as IPO fever reverses — Shares of Elon Musk's SpaceX shed USD400bn in market value in the June 22 session, marking another sharp bout of volatility after...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026



US eases Iran oil sanctions for 60 days — The US partially eased sanctions on Iran's oil sector after talks between Washington and Tehran showed signs of progress...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026



New US tariff strategy: winners, losers and unknowns — As the temporary 10% tariff imposed broadly under President Trump is set to expire at the end of July, markets are reassessing the potential winners, losers and remaining uncertainties...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026



Global gold rebounds as prospect of US-Iran peace drags oil prices lower — Gold prices rose nearly 1% on June 22 as progress in peace talks weighed on oil prices and supported demand for defensive assets...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026



Brent crude drops more than 3% after US allows Iranian crude exports — Oil prices fell sharply at the start of the week after the US Treasury temporarily allowed Iranian crude exports, easing supply concerns...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026



Wall Street closes in the red as SpaceX plunges 16% — US stocks ended the June 22 session in negative territory as technology stocks came under pressure, while SpaceX shares dropped sharply in private-market trading...

GLOBAL NEWS | Updated at 15:33:03 · 23/06/2026

📍 DOMESTIC NEWS

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Vietnam International Financial Center (VIFC): Not the next Dubai

MACRO | 4 minutes ago



Ministry of Industry and Trade urgently asks local authorities to update power-demand needs for charging stations

ECONOMY - INVESTMENT | 4 hours ago



Carbon traceability in seafood: Vietnamese shrimp faces stringent European checks

ECONOMY - INVESTMENT | 4 hours ago



Building a high-quality FDI stronghold

NEWS | Today



Gia Lai approves investors for 10 energy projects worth more than VND13.5tn

NEWS | Today



General Secretary and State President To Lam: Institutions must become a resource for development

NEWS | Today

🏢 CORPORATE NEWS

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C69 seeks to raise VND300bn for M&A — C69 plans to offer up to 30mn shares to raise charter



Pacific Airlines accumulated losses exceed VND10.6tn; Vietnam Airlines considers full

capital and supplement funding for M&A and business expansion activities...

CORPORATE NEWS | Updated at 15:33:03 · 23/06/2026

divestment — Pacific Airlines remains deeply loss-making, prompting Vietnam Airlines to consider fully divesting its stake...

CORPORATE NEWS | Updated at 15:33:03 · 23/06/2026



G36 contributes capital to establish a company worth more than VND700bn in Gia Lai — Corporation 36 decided to contribute capital to establish a new enterprise in Gia Lai, expanding its investment footprint...

CORPORATE NEWS | Updated at 15:33:03 · 23/06/2026



BCM injects another VND200bn into Becamex Binh Dinh — The BOD of Becamex Group (HOSE: BCM) approved an additional capital injection into Becamex Binh Dinh...

CORPORATE NEWS | Updated at 15:33:03 · 23/06/2026



Billionaire Tran Dinh Long teams up with businessman Tran Dang Khoa to establish a VND2tn wind-power company — Hoa Phat Group JSC (HOSE: HPG) has taken a notable step into the renewable-energy sector...

CORPORATE NEWS | Updated at 15:33:03 · 23/06/2026



DGC explains 2025 audited financial statements, postpones AGM date — On June 22, Duc Giang Chemicals Group JSC (HOSE: DGC) announced the record date for its AGM and explained its audited financial statements...

CORPORATE NEWS | Updated at 15:33:03 · 23/06/2026



EVENTS CALENDAR

Upcoming corporate and macro events

08/2026

10

CDP

Cash dividend of VND500/share

Dividend

07/2026

10

BHH

Cash dividend of VND700/share

Dividend

08/2026

25

NBC

Cash dividend of VND600/share

Dividend

08/2026

06

ADP

Cash dividend of VND700/share

Dividend

07/2026

30

CTR

Cash dividend of VND1,500/share

Dividend

07/2026

30

IBD

Cash dividend of VND500/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 

1,869.04 +0.6%

CHANGE +11.13 pts

TURNOVER 19,058.1bn | +6,752.6bn
(+54.88%)

Advancers 99 **Unchanged** 61 **Decliners** 210


VN30 

1,995.12 +0.76%

CHANGE +14.99 pts

TURNOVER 12,223.8bn | +5,294.4bn
(+76.41%)

Advancers 13 **Unchanged** 4 **Decliners** 13

HNX-INDEX 

326.38 +1.66%

CHANGE +5.32 pts

TURNOVER 1,121.4bn | +413.4bn
(+58.39%)

Advancers **Unchanged** **Decliners**

 **MARKET RECAP**

VN-Index closed up more than 11 pts, staying in positive territory for most of the session, but gains narrowed notably toward the close as profit-taking pressure intensified at elevated prices, leaving the index in the lower half of its intraday range. Although liquidity improved meaningfully and foreign investors recorded strong net buying of VND1,764bn, concentrated in index heavyweights such as VIC, LPB and BID, market breadth remained negative with 210 decliners on the HOSE. Divergence was pronounced as Oil & Gas, Real Estate, Steel and Securities corrected simultaneously, while the index's advance was driven mainly by support from 13 VN30 constituents, indicating that although cash flow improved, investor caution still prevailed amid profit-taking pressure.

 **OUR VIEW**

VN-Index is sending a neutral signal after forming a Spinning Top candle at 1,869 pts, reflecting a tug-of-war between supply and demand while the index remains above MA10 and MA20. Although price momentum is supported by RSI(14) at 60, late-session selling pressure and a neutral MFI reading of 49 suggest that short-term correction risk remains if the index fails to break above resistance at 1,880–1,890 or loses support at 1,860–1,870. Under a base case of continued range-bound trading in the next session, short-term investors should keep equity exposure at a prudent level, avoid chasing strength and trade within the range, while focusing on sectors with idiosyncratic catalysts such as State divestments, economic-development resolutions, the market-upgrade roadmap and the new offshore oil & gas cycle. Medium- to long-term investors may use pullbacks toward support zones to accumulate fundamentally sound, liquid stocks in Banks, Securities, Retail and Public Investment.

 **FOREIGN FLOW SPOTLIGHT**

 Net buying sessions **0/6**

 **FOREIGN NET FLOWS OVER SIX SESSIONS**

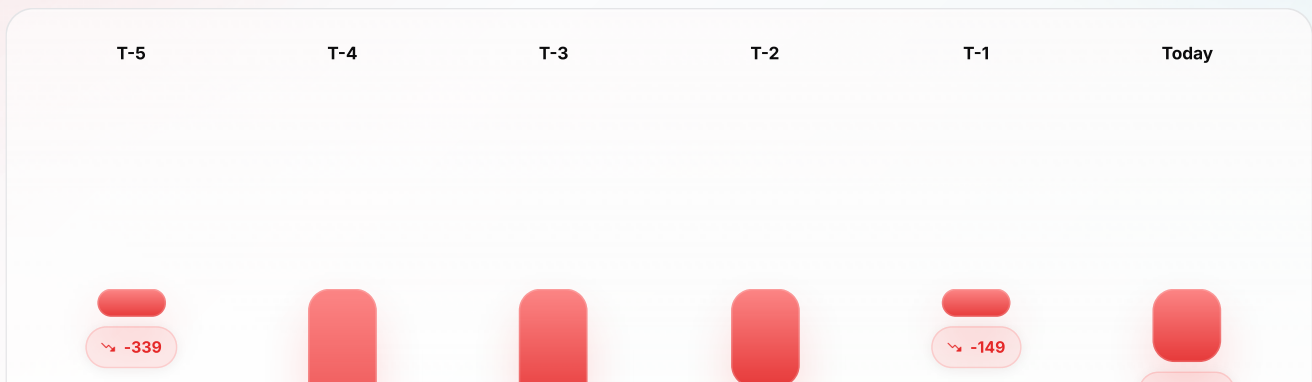
 Today **-1.119**

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

Six-session cumulative net selling **-8.075**

Largest swing **-3.128**

Reversal session **None**



-3.128

-1.824

-1.516

-1.119

Source: Algo, ASEANSC Research

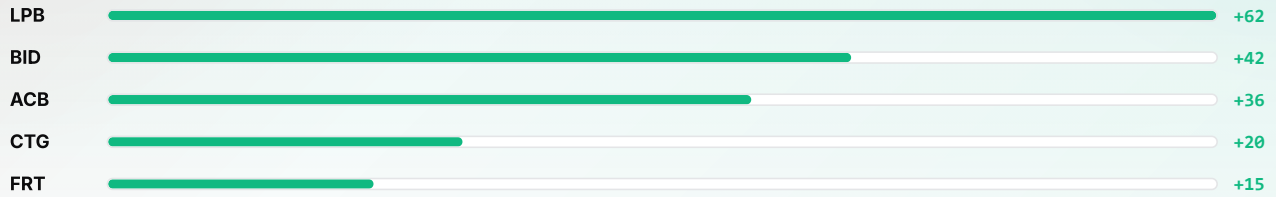
Key takeaway: Foreign investors recorded cumulative net selling of VND8,075bn over six sessions, with net selling in all 6 sessions.

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

VN-INDEX

1,869.04

+0.6%

CHANGE +11.13 pts

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Advancers 99

Unchanged 61

Decliners 210

VN30

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Advancers 13

Unchanged 4

Decliners 13

HNX-INDEX

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Advancers

Unchanged

Decliners

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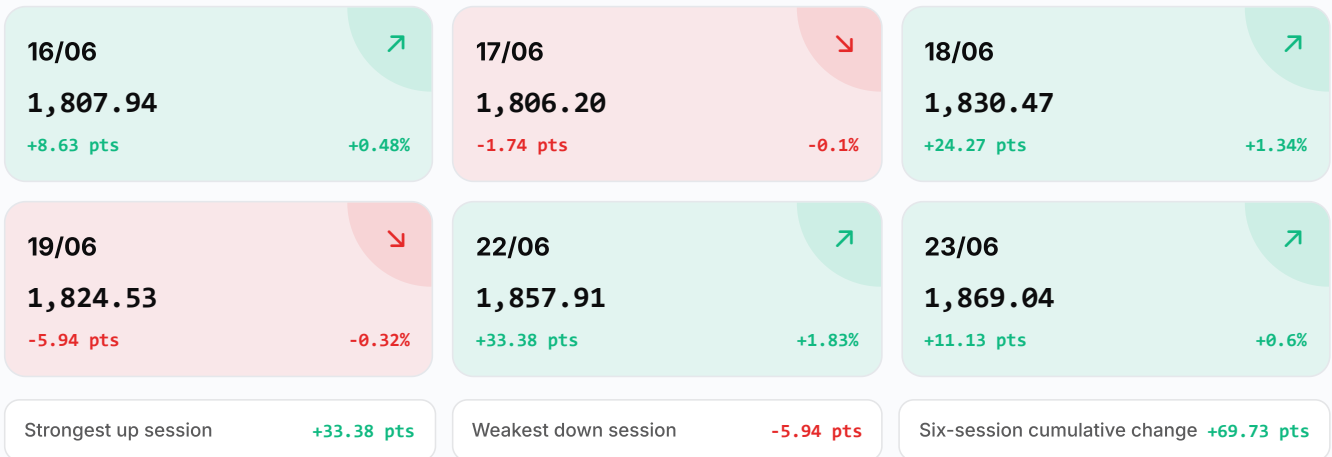
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VN-INDEX MOVEMENT OVER THE LAST SIX SESSIONS

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

● ADVANCERS ● DECLINERS ● SIDEWAYS



FOREIGN FLOW SPOTLIGHT

Net buying sessions 0/6

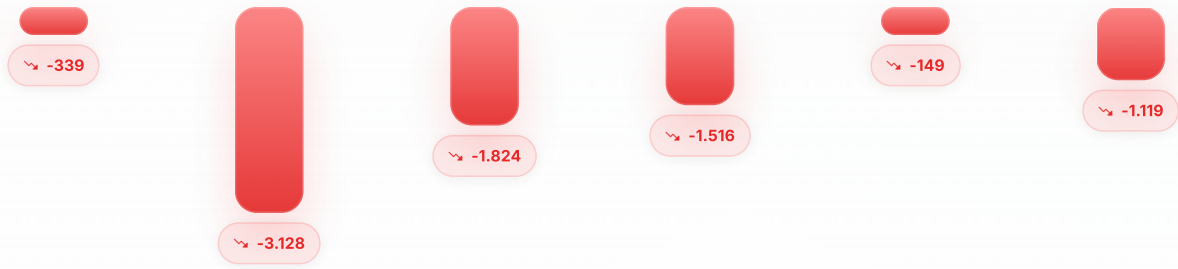
FOREIGN NET FLOWS OVER SIX SESSIONS

Today -1.119

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

Six-session cumulative net selling: -8.075 | Largest swing: -3.128 | Reversal session: None

T-5 T-4 T-3 T-2 T-1 Today



Source: Algo, ASEANSC Research

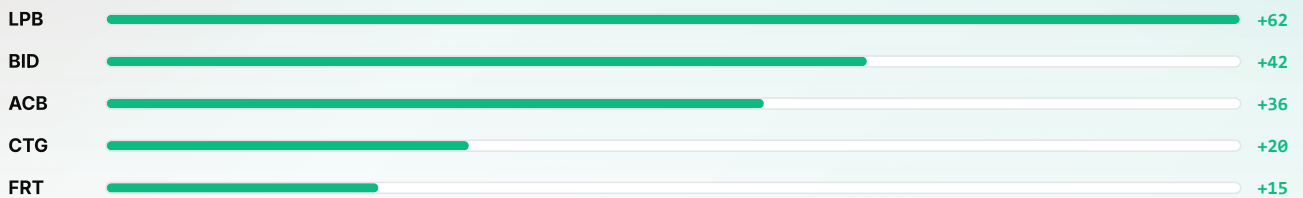
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FLOW LEADERS

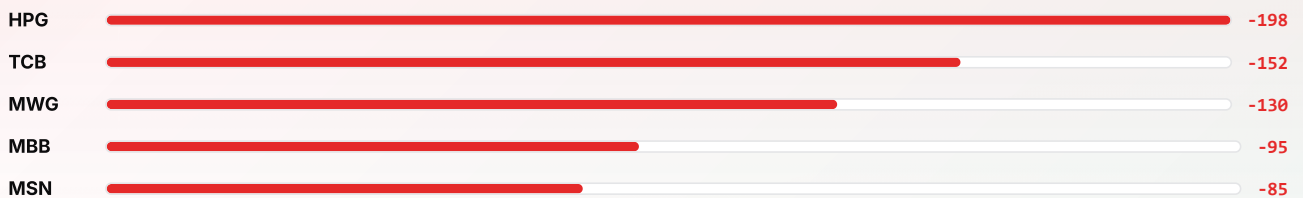
TOP FOREIGN FLOW TICKERS

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
June 17, 2026 – June 23, 2026 (1 week)

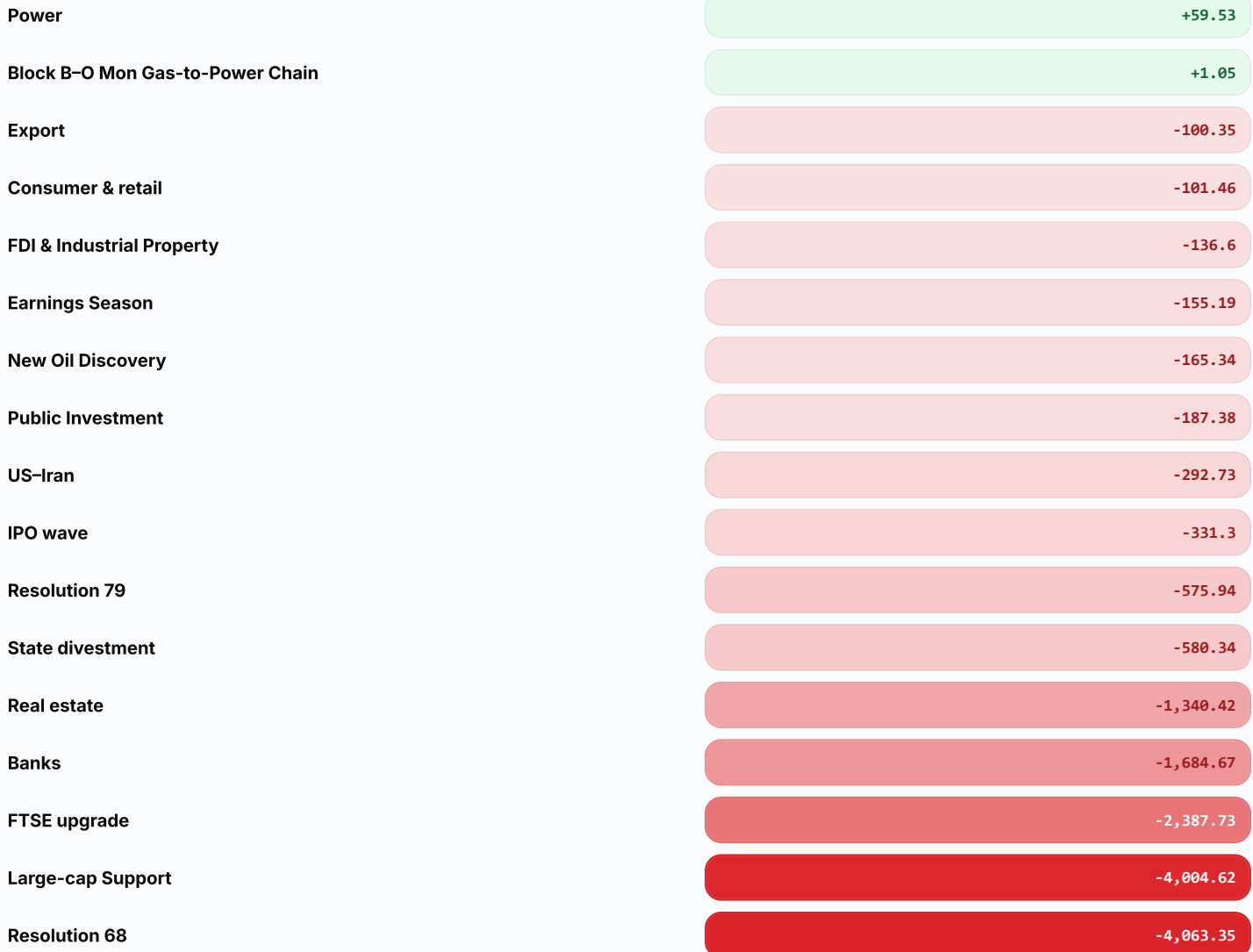
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Ranking domestic and foreign money-flow priorities across key investment themes over a one-week observation window.

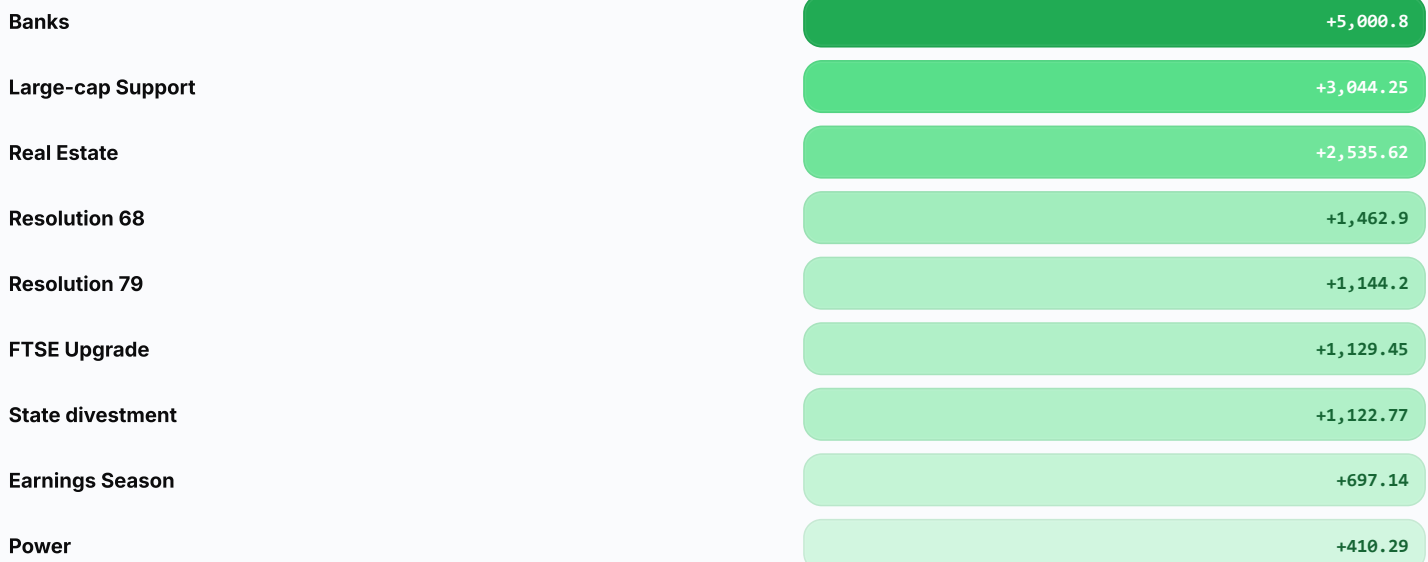
Foreign Money Flow Heatmap

📅 1 WEEK



Domestic Money Flow Heatmap

🏠 1 WEEK



Block B-O Mon Gas-to-Power Chain

+186.09

New oil discovery

-40.53

U.S.-Iran

-107.43

Export

-139.69

FDI & Industrial Property

-235.35

Public Investment

-2,003.38

Consumer & Retail

-2,790.16

IPO wave

-4,146.7

Strong negative  Strong positive

Top foreign-flow tickers

 LOGIN REQUIRED

Without login: only top-10 ranking is shown. Log in to ASC to view ticker details and open the trading board.

#1

#2

#3

#4

#5

#6

#7

#8

#9

#10



Log in to view top foreign money-flow names

Detailed tickers are hidden for visitors who are not logged in to an ASC account.

 Log in

Top domestic-flow tickers

 LOGIN REQUIRED

Without login: only top-10 ranking is shown. Log in to ASC to view ticker details and open the trading board.

#1

#2

#3

#4

#5

#6

#7

#8

#9

#10



Log in to view top domestic money-flow names

Detailed tickers are hidden for visitors who are not logged in to an ASC account.

 Log in

DISCLAIMER

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