

🕒 08:00 AM · PRE-MARKET



MORNING BRIEF

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

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🌐 US EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	51,032.46	+363.49 (0.72%)
S&P 500 derived	7,580.06	+16.43 (0.22%)
Nasdaq	26,972.62	+55.15 (0.2%)
Small Cap 2000 derived	2,919.34	-17.23 (-0.59%)
S&P 500 VIX derived	15.95	+0.63 (4.11%)
S&P/TSX	34,769.14	+251.44 (0.73%)

Source: Investing.com, Vietstock, compiled by ASEANSC

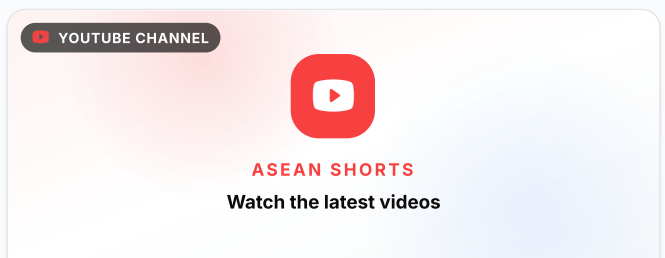
📺 ASEAN DIGITAL SECURITIES YOUTUBE CHANNEL

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FEATURED VIDEO

Quick Market Update from ASEAN Securities



ASEAN SHORTS

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ASEAN Digital Securities YouTube Shorts

🌐 INTERNATIONAL NEWS



Foreign funds hold only 0.1% market share in China after five years of regulatory easing — Global asset managers had high expectations for China's mutual fund market after Beijing relaxed foreign ownership rules, but their market share remains modest.



Former Chair Powell: The Fed is under mounting pressure — Jay Powell said the US Federal Reserve is undergoing a stress test that may affect its institutional independence and policy credibility.

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026



Is Pizza Hut about to be sold? — Yum Brands is in exclusive talks to sell Pizza Hut to private equity firm LongRange Capital, according to a source familiar with the matter...

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026



Warren Buffett's conglomerate acquires a homebuilder — Berkshire Hathaway announced an agreement to acquire homebuilder Taylor Morrison Home for USD 6.8bn, reinforcing investor interest in the US housing sector.

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026



WTI crude rises nearly 3% as Israel expands its campaign in Lebanon — Oil prices rose sharply on June 1 after Israel expanded its military campaign in Lebanon, raising concerns about regional supply risks.

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026



SoftBank to invest EUR 75bn in AI mega-infrastructure in France — SoftBank plans to deploy capital through 2031 to build data centres in France, marking a large-scale AI infrastructure push.

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026



Why is taxing the ultra-rich so difficult? — The ultra-rich hold record wealth, yet effective tax burdens remain a source of policy debate as attempts to raise taxes face political resistance.

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026



Europe increases reliance on US liquefied natural gas — Europe has increased energy imports from Norway, Algeria, Azerbaijan, Qatar and the US as it replaces Russian supply sources.

INTERNATIONAL NEWS

Updated at 15:36:53 · 01/06/2026

📍 DOMESTIC NEWS

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Vietnam and the Philippines upgrade ties to an enhanced strategic partnership

MACRO | 31 minutes ago



In three weeks, 28 intellectual property infringement cases were prosecuted

ECONOMY - INVESTMENT | 1 hours ago



When logistics remains stuck on roads

ECONOMY - INVESTMENT | 1 hours ago



100-year vision: HoREA proposes Ho Chi Minh City move toward a "20-minute city" model

MACRO | 3 hours ago



May 2026 PMI: New orders and purchasing activity return to growth

NEWS | Today



Bau Hien's "technology DNA" and the logic behind Vietnam SuperPort™

NEWS | Today

🏢 CORPORATE NEWS

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SeABank appoints an additional Deputy CEO — Southeast Asia Commercial Joint Stock Bank (SeABank, HOSE: SSB) officially appointed Vo Long Nhi (Andrew Vo) as Deputy CEO effective June 1, 2026...



TCX establishes VND 800bn subsidiary to participate in VIFC, signalling new moves in digital assets — TCX approved the establishment of a subsidiary with VND 800bn in charter capital

CORPORATE NEWS | Updated at 15:36:53 · 01/06/2026



TCI expects profit growth despite lower revenue plan, while doubling capital — Although TCI guides for a 41% YoY decline in 2026 revenue, the company still targets NPAT growth and plans to double capital.

CORPORATE NEWS | Updated at 15:36:53 · 01/06/2026

to participate in VIFC-related activities while advancing its digital-asset strategy.



With accumulated losses near VND 880bn and high interest burden, An Giang Fisheries targets profitability in 2026 — The company faces accumulated losses of VND 878.6bn as of end-2025 and annual interest expenses above VND 30bn, but still targets a return to profit.

CORPORATE NEWS | Updated at 15:36:53 · 01/06/2026



Bidiphar launches a large-scale digital transformation project — Binh Dinh Pharmaceutical and Medical Equipment JSC (HOSE: DBD) and Citek officially launched a broad digital transformation project.

CORPORATE NEWS | Updated at 15:36:53 · 01/06/2026



REE receives guarantee for a VND 1.5tn loan for a wind power project in Vinh Long — REE approved a guarantee arrangement for a loan of over VND 1.5tn for the V1-3 wind power plant project.

CORPORATE NEWS | Updated at 15:36:53 · 01/06/2026



EVENTS CALENDAR

Upcoming corporate and macro events

07/2026

15

DTD

Cash dividend payment of VND 500/share

Dividend

07/2026

10

MND

Cash dividend payment of VND 780/share

Dividend

07/2026

06

DPG

Cash dividend payment of VND 600/share

Dividend

07/2026

14

NAP

Cash dividend payment of VND 650/share

Dividend

08/2026

05

CDG

Cash dividend payment of VND 1,100/share

Dividend

07/2026

27

BIO

Cash dividend payment of VND 1,100/share

Dividend

12:00 PM · MID-SESSION



MID-SESSION UPDATE

Morning market pulse, money flows and key index movements.

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VN-INDEX ↘

1,844.54 -1.02%

CHANGE -18.95 points

TRADING 11,446.1 bn | -3,345.2 bn (-22.62%)

VALUE

Advancers **165** | Unchanged **66** | Decliners **133**

VN30 ↘

1,989.71 -0.37%

CHANGE -7.35 points

TRADING 6,472.7 bn | -1,980.0 bn (-23.42%)

VALUE

Advancers **8** | Unchanged **3** | Decliners **19**

HNX-INDEX ↗

305.18 +3.47%

CHANGE +10.24 points

TRADING 816.8 bn | -18.0 bn (-2.15%)

VALUE

Advancers **10** | Unchanged **10** | Decliners **10**

↗ MARKET RECAP

The VN-Index closed down nearly 19 points as selling pressure intensified in the afternoon session, pushing the index to close near the low end of its intraday range and indicating that buyers' stabilisation efforts were not strong enough to reverse the intraday downtrend. Index pressure was driven by weakness in 19/30 VN30 constituents, declines in the Oil & Gas and Power sectors, and foreign net selling of VND 541bn concentrated in names such as ACB, MSB and VIC. Although the sharp drop in liquidity reflected broad-based caution, the market still showed some constructive signals as advancers outnumbered decliners on HOSE, while Real Estate and Securities provided partial support and helped cushion the overall correction.

🌐 MARKET VIEW

From a technical perspective, the VN-Index is flashing clearer signs of weakness after closing at 1,845 points with a long bearish candle and falling below both the MA10 and MA20. Momentum also deteriorated, with RSI easing to 43 and MFI to 34, confirming that selling pressure remains dominant. As the index closed near the session low, the base case is for further downside testing of nearby support zones, especially if demand does not recover quickly in the coming sessions. Against this backdrop, short-term investors should prioritise risk control, reduce exposure on technical rebounds and avoid leverage. New buying should only be considered when clearer bottoming signals emerge alongside a meaningful liquidity recovery, with focus on stocks backed by idiosyncratic stories such as State divestment, market upgrade prospects, economic development resolutions or the offshore cycle. For medium- to long-term investors, this correction may offer an opportunity to start phased accumulation at medium-term support zones, prioritising companies with solid fundamentals while avoiding highly volatile or illiquid segments.

📄 FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions **0/6**

📊 FOREIGN NET FLOWS OVER THE LAST SIX SESSIONS

↓ Today **-541**

Unit: VND bn · Green bars indicate net buying; red bars indicate net selling · The midline marks the neutral level.

Cumulative six-session net selling **-5.323**

Largest outflow **-1.926**

Reversal session **None**



-1.926

Source: Algo, compiled by ASEANSC

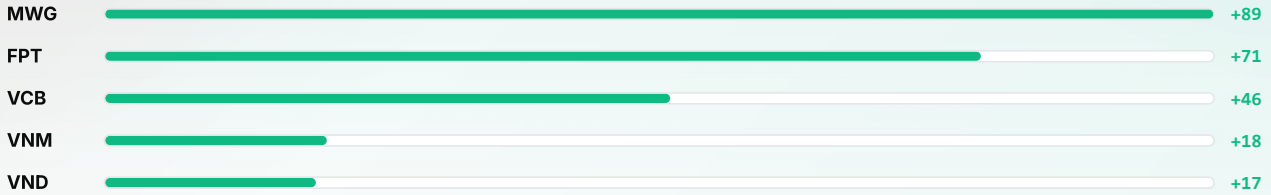
Highlight: Foreign investors recorded cumulative net selling of VND 5,323bn over six sessions, with net selling in all six sessions.

FLOW LEADERS

TOP FOREIGN TRADES

Top five net-buying and net-selling stocks in the session.

TOP 5 NET BUYS



TOP 5 NET SELLS



15:30 PM · MARKET CLOSE



MARKET CLOSE

Session recap, trend assessment and key market data of the day.

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MARKET INDEX SUMMARY

VN-INDEX ↘
1,844.54 -1.02%
CHANGE -18.95 points
TRADING VALUE 11,446.1 bn | -3,345.2 bn (-22.62%)

Advancers: 165
Unchanged: 66
Decliners: 133

VN30 ↘
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CHANGE -7.35 points
TRADING VALUE 6,472.7 bn | -1,980.0 bn (-23.42%)

Advancers: 8
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HNX-INDEX ↗
305.18 +3.47%
CHANGE +10.24 points
TRADING VALUE 816.8 bn | -18.0 bn (-2.15%)

Advancers
Unchanged
Decliners

MARKET RECAP

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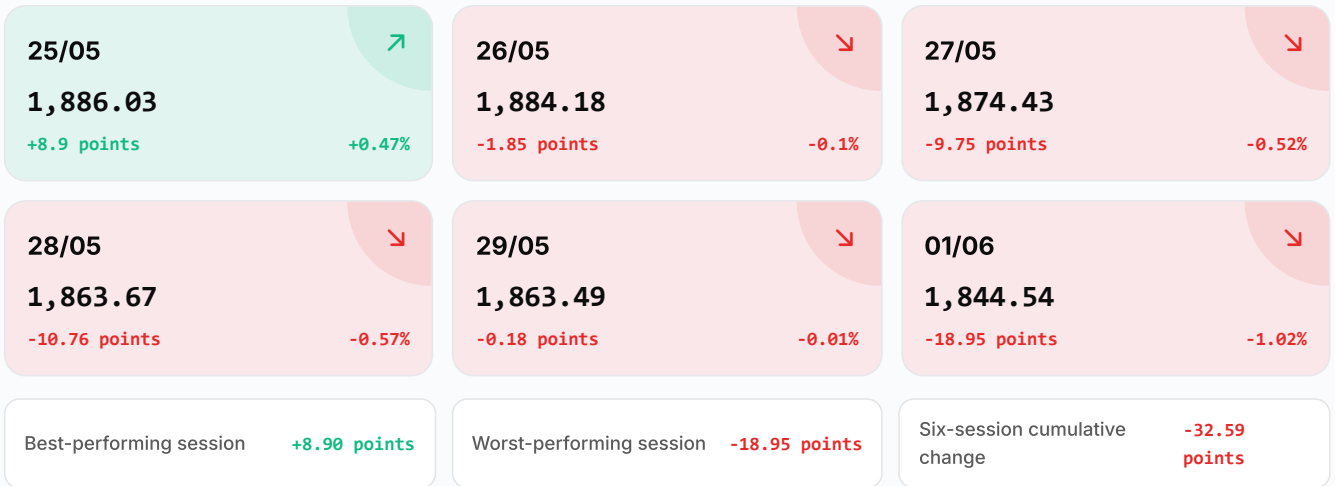
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VN-INDEX PERFORMANCE OVER THE LAST SIX SESSIONS

Each tile represents one recent session | Showing closing level and change vs. the preceding session

UP DOWN FLAT



FOREIGN FLOW SPOTLIGHT

Net-buying sessions 0/6

FOREIGN NET FLOWS OVER THE LAST SIX SESSIONS

Today -541

Unit: VND bn · Green bars indicate net buying; red bars indicate net selling · The midline marks the neutral level.

Cumulative six-session net selling -5.323 Largest outflow -1.926 Reversal session None

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



-1.926



-833



-773



-567



-683



-541

Source: Algo, compiled by ASEANSC

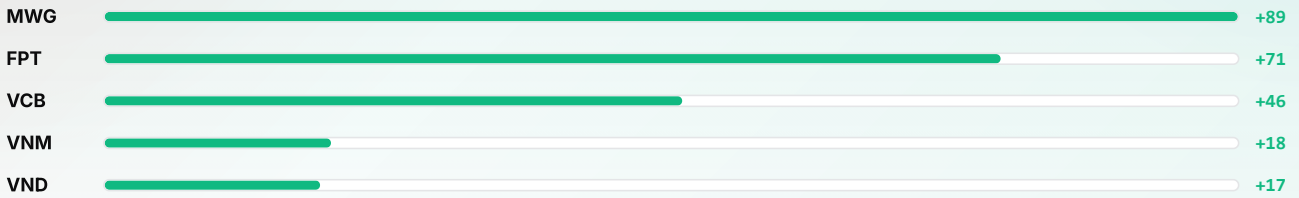
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FLOW LEADERS

TOP FOREIGN TRADES

Top five net-buying and net-selling stocks in the session.

TOP 5 NET BUYS



TOP 5 NET SELLS



MONEY FLOW · HEATMAP

DOMESTIC VS. FOREIGN FLOW HEATMAP



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

TIME FRAME

26/05/2026 – 01/06/2026 (1 week)

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Heatmap Foreign Flows

1 WEEK

Consumer - Retail	+180,71
Block B - O Mon Gas-to-Power Chain	-26,94
Power	-65,65
Exports	-138,41
FDI & Industrial Real Estate	-139,72
Earnings Season	-196,37
New Oil Discovery	-244,29
US - Iran	-292,71
Resolution 79	-331,43
State Divestment	-340,37
Public Investment	-416,95
Banking	-423,66
IPO Wave	-448,49
Real Estate	-544,24
Index Heavyweight Support	-717,75
Resolution 68	-821,62
FTSE Upgrade	-1.070,91

Heatmap Domestic Flows

1 WEEK

New Oil Discovery	+1.581,06
US - Iran	+1.336,11

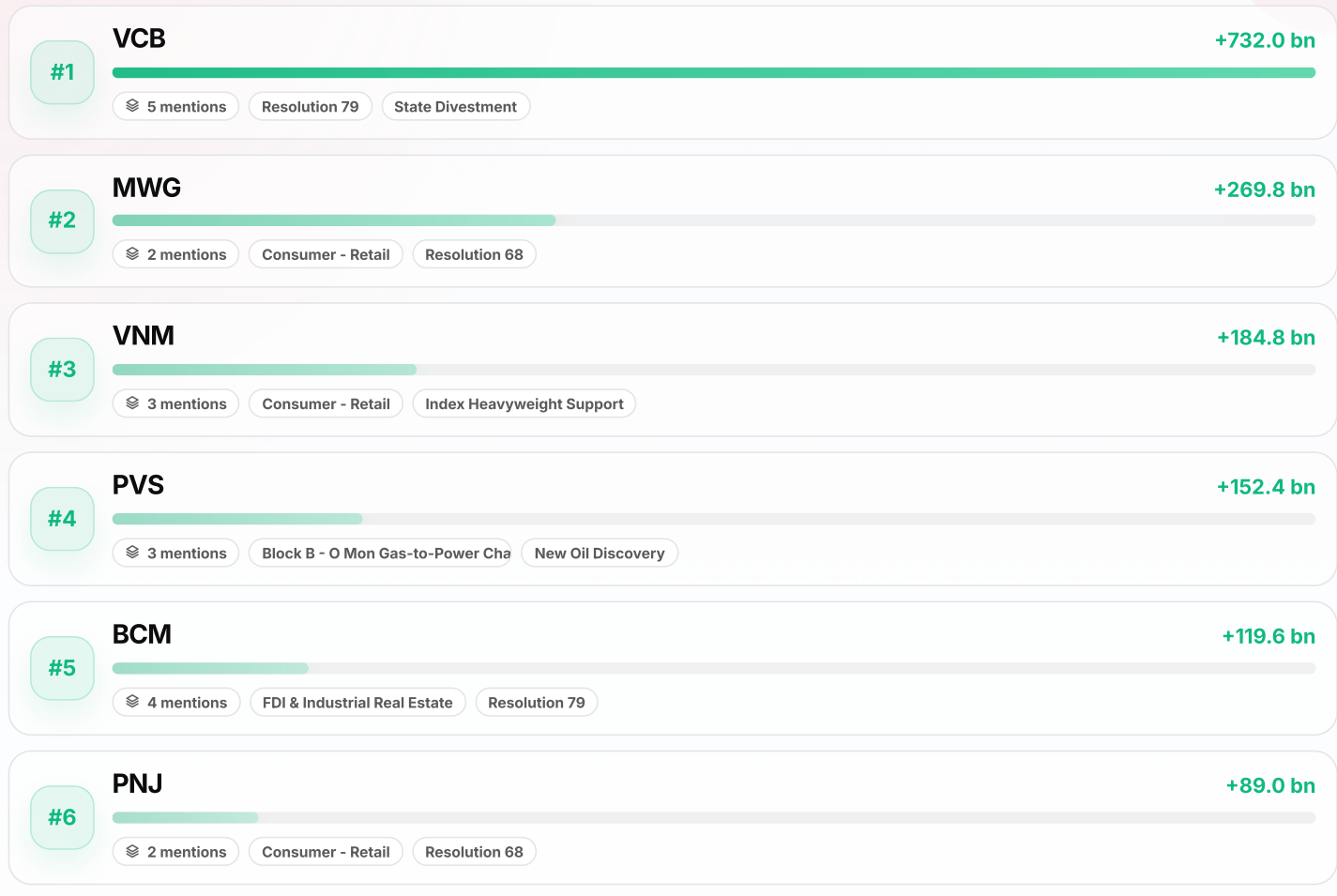


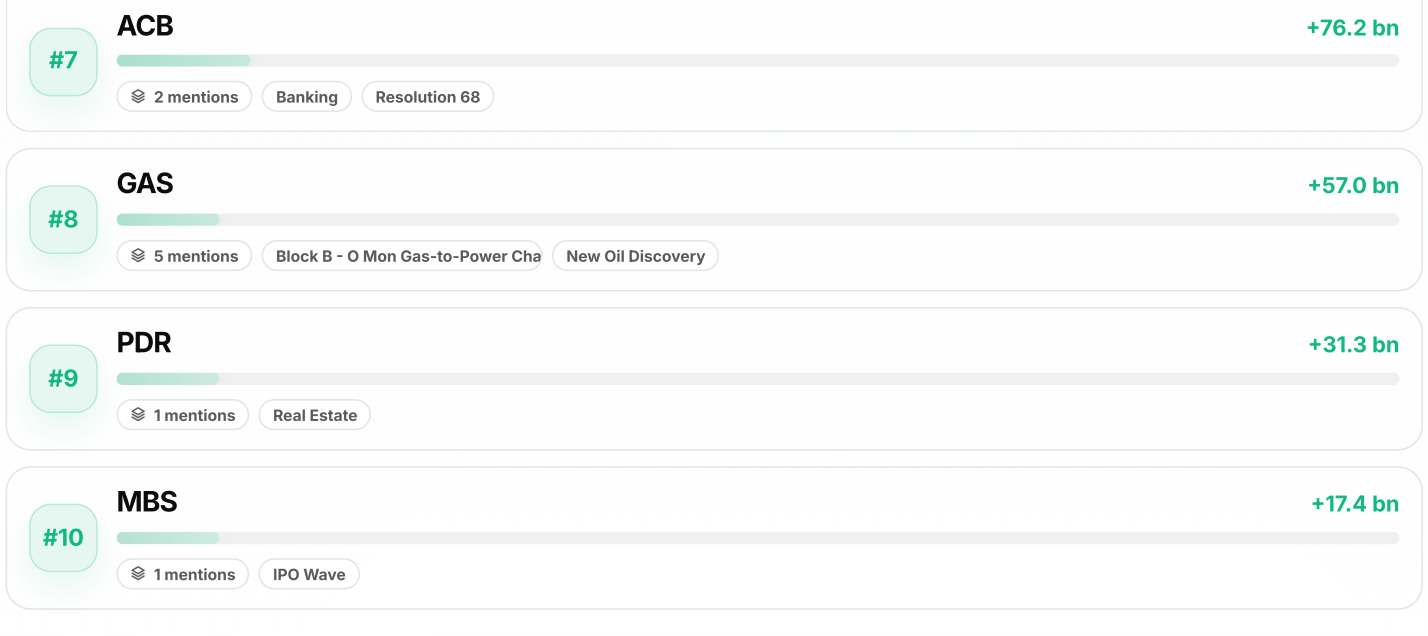
Strong Negative Strong Positive

Top Foreign Flows

TICKER RANKING

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

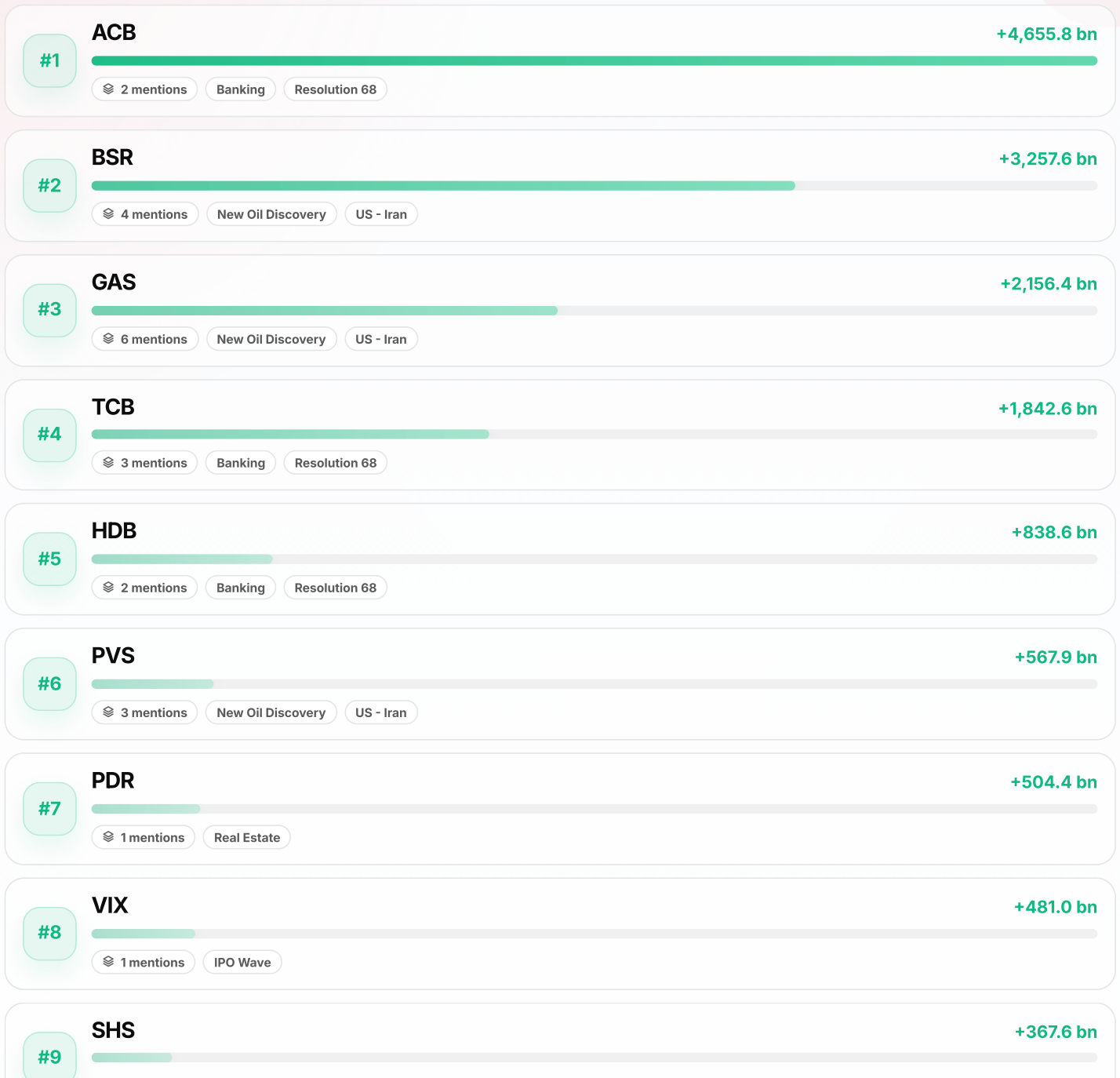




Top Domestic Flows

TICKER RANKING

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



1 mentions

IPO Wave

HPG

+288.8 bn

#10

2 mentions

Public Investment

FTSE Upgrade

DISCLAIMER

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