

🕒 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	51,078.88	+46.42 (0.09%)
S&P 500 derived	7,599.96	+19.9 (0.26%)
Nasdaq	27,086.81	+114.19 (0.42%)
Small Cap 2000 derived	2,905.76	-13.58 (-0.47%)
S&P 500 VIX derived	16.14	+0.09 (0.56%)
S&P/TSX	34,734.89	-34.25 (-0.1%)

Source: Investing.com, Vietstock, compiled by ASEANSC

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## 🌐 INTERNATIONAL NEWS



**Corporate update** — Details are provided in the source article.

INTERNATIONAL NEWS

Updated at 17:34:56 · 02/06/2026



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 **DOMESTIC NEWS**

 **Place Order**



**Market and economic update**

**ECONOMY - INVESTMENT** | 2 hours ago



**Market and economic update**

**NEWS** | Today



**Market and economic update**

**NEWS** | Today



**Market and economic update**

**NEWS** | Today



**Market and economic update**

**NEWS** | Today



**Market and economic update**

**NEWS** | Today

 **CORPORATE NEWS**

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# EVENTS CALENDAR

Upcoming corporate and macro events

06/2026  
**30**  
**DCG**  
Cash dividend payment of VND 2,000/share  
Dividend

06/2026  
**29**  
**CCA**  
Cash dividend payment of VND 1,000/share  
Dividend

06/2026  
**23**  
**HII**  
Cash dividend payment of VND 300/share  
Dividend

06/2026  
**30**  
**NLG**  
Cash dividend payment of VND 500/share  
Dividend

06/2026  
**30**  
**GEE**  
Cash dividend payment of VND 500/share  
Dividend

07/2026  
**03**  
**TOT**  
Cash dividend payment of VND 700/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**

**1,826.47** **-0.98%**

CHANGE **-18.07 pts**

TRADING VALUE **16,355.4 bn | +4,858.6 bn (+42.26%)**

Advancers: 87 | Unchanged: 52 | Decliners: 226

**VN30**

**1,972.99** **-0.84%**

CHANGE **-16.72 pts**

TRADING VALUE **10,075.3 bn | +3,619.1 bn (+56.06%)**

Advancers: 3 | Unchanged: 1 | Decliners: 26

**HNX-INDEX**

**314.79** **+3.15%**

CHANGE **+9.61 pts**

TRADING VALUE **911.7 bn | +92.8 bn (+11.33%)**

Advancers: | Unchanged: | Decliners:

### MARKET RECAP

The VN-Index closed down more than 18 points as selling pressure intensified late in the session, fully erasing the earlier recovery attempt and pushing the index to close near the low end of its intraday range. Red dominated across the board with 226 decliners on HOSE, led by broad-based weakness in Real Estate, Steel, Construction and Oil & Gas, while the VN30 basket also weighed on sentiment as 26/30 constituents declined. Foreign investors remained negative, with net selling of VND 529bn concentrated in large-cap names such as HPG, HDB and ACB, adding another headwind to market sentiment. The only constructive signal was a clear improvement in liquidity versus the previous session, suggesting more active bottom-fishing demand, although this buying was still insufficient to offset sellers and reverse the intraday trend.

## 🌐 MARKET VIEW

The VN-Index is flashing clear signs of weakness after closing at 1,826 points, confirming a negative short-term setup as the index remains below both the MA10 and MA20, while momentum indicators also deteriorated in tandem with RSI at 39 and MFI at 34. As the index closed near the session low, selling pressure is clearly dominant, leaving a less constructive base case in which the index continues to retest nearby support zones in the next session before establishing a clearer trend. Against this backdrop, the optimal strategy for short-term investors is to prioritise risk management, reduce exposure on technical rebounds, avoid leverage and only consider new buying when bottoming signals emerge alongside improving liquidity. Focus should remain on stocks backed by idiosyncratic catalysts such as State divestment, economic development resolutions, market upgrade prospects or the offshore oil & gas cycle. Medium- to long-term investors can use pullbacks toward medium-term support zones to accumulate fundamentally sound stocks gradually, while avoiding highly volatile and illiquid segments.

## 📊 FOREIGN FLOW SPOTLIGHT

📈 Net-buying sessions 0/6

### 📊 FOREIGN NET FLOWS OVER THE LAST SIX SESSIONS

📉 Today -529

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

Cumulative six-session net selling -3,941

Largest outflow -833

Reversal session None



Source: Algo, compiled by ASEANSC

Highlight: Foreign investors recorded cumulative net selling of VND 3,941bn 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



FPT	+482
VHM	+65
MWG	+57
LPB	+30
SHB	+26

TOP 5 NET SELLS



HPG	<div style="width: 95%;"></div>	-124
HDB	<div style="width: 90%;"></div>	-122
ACB	<div style="width: 85%;"></div>	-117
CTG	<div style="width: 75%;"></div>	-105
VPB	<div style="width: 70%;"></div>	-103

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

<p><b>VN-INDEX</b> <span style="color:red">↘</span></p> <p><b>1,826.47</b> <span style="color:red">-0.98%</span></p> <p>CHANGE <span style="color:red">-18.07 pts</span></p> <p>TRADING VALUE <span style="color:green">16,355.4 bn   +4,858.6 bn (+42.26%)</span></p> <p> <span style="background-color:#e0f2f1; border-radius:50%; padding:2px 5px;">Advancers</span> 87             <span style="background-color:#fff9c4; border-radius:50%; padding:2px 5px; margin-left:10px;">Unchanged</span> 52             <span style="background-color:#ffe0b2; border-radius:50%; padding:2px 5px; margin-left:10px;">Decliners</span> 226         </p>	<p><b>VN30</b> <span style="color:red">↘</span></p> <p><b>1,972.99</b> <span style="color:red">-0.84%</span></p> <p>CHANGE <span style="color:red">-16.72 pts</span></p> <p>TRADING VALUE <span style="color:green">10,075.3 bn   +3,619.1 bn (+56.06%)</span></p> <p> <span style="background-color:#e0f2f1; border-radius:50%; padding:2px 5px;">Advancers</span> 3             <span style="background-color:#fff9c4; border-radius:50%; padding:2px 5px; margin-left:10px;">Unchanged</span> 1             <span style="background-color:#ffe0b2; border-radius:50%; padding:2px 5px; margin-left:10px;">Decliners</span> 26         </p>	<p><b>HNX-INDEX</b> <span style="color:green">↗</span></p> <p><b>314.79</b> <span style="color:green">+3.15%</span></p> <p>CHANGE <span style="color:green">+9.61 pts</span></p> <p>TRADING VALUE <span style="color:green">911.7 bn   +92.8 bn (+11.33%)</span></p> <p> <span style="background-color:#e0f2f1; border-radius:50%; padding:2px 5px;">Advancers</span> <span style="background-color:#fff9c4; border-radius:50%; padding:2px 5px; margin-left:10px;">Unchanged</span> <span style="background-color:#ffe0b2; border-radius:50%; padding:2px 5px; margin-left:10px;">Decliners</span> </p>
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📍 MARKET VIEW

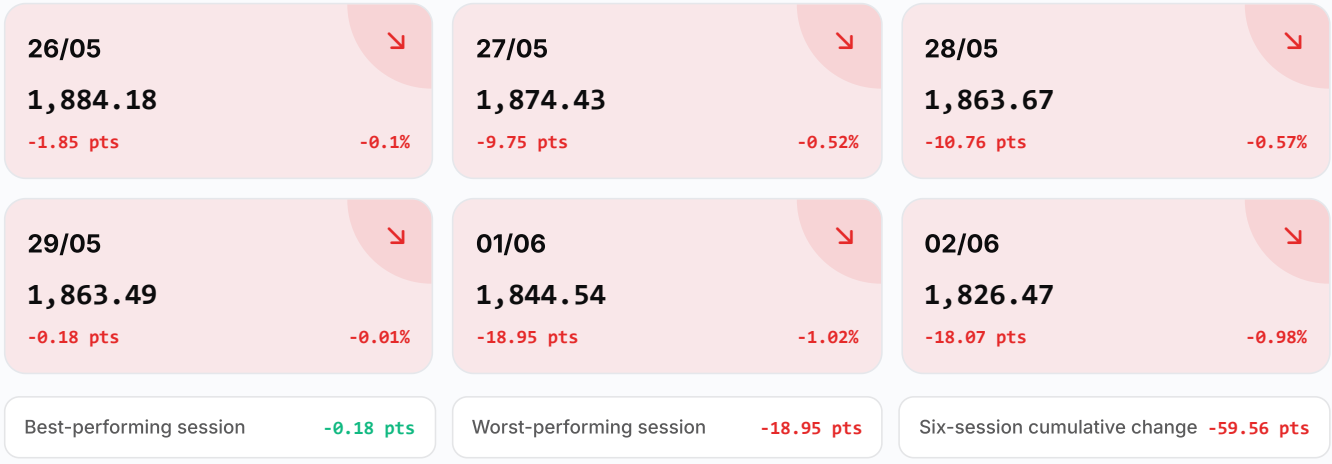
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### VN-INDEX PERFORMANCE OVER THE LAST SIX SESSIONS

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

● ADVANCERS ● DECLINERS ● FLAT



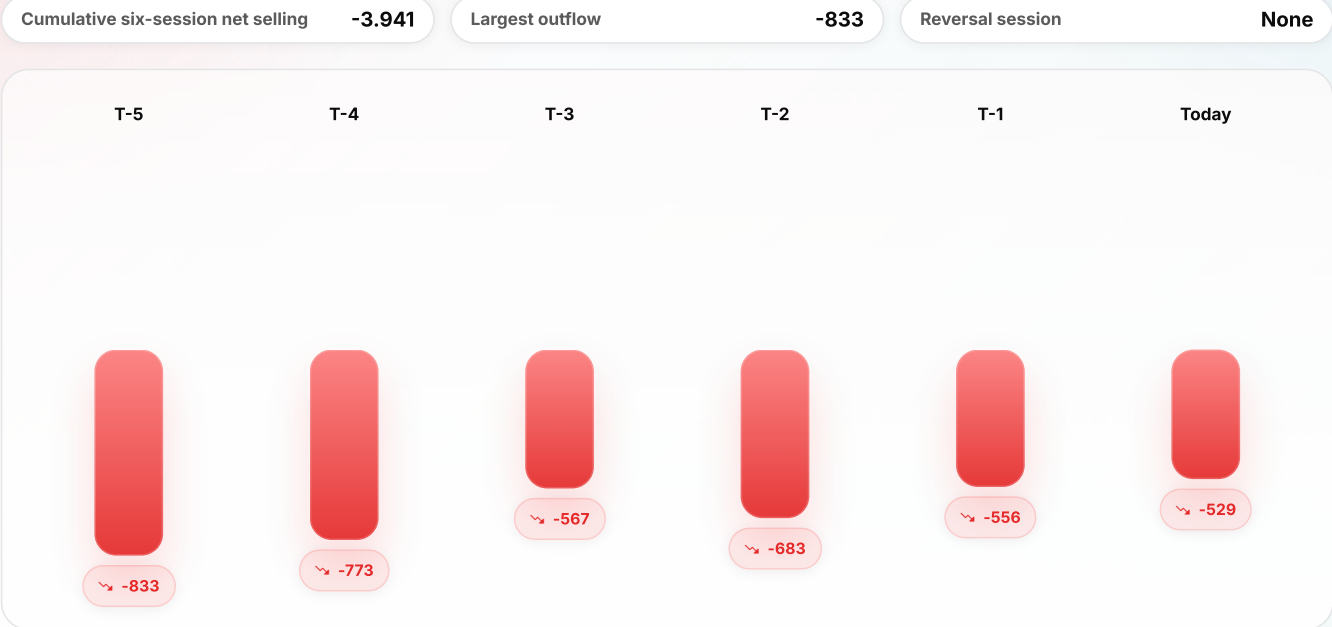
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### FOREIGN NET FLOWS OVER THE LAST SIX SESSIONS

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Highlight: Foreign investors recorded cumulative net selling of VND 3,941bn 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



MONEY FLOW · HEATMAP



# DOMESTIC VS. FOREIGN FLOW HEATMAP

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

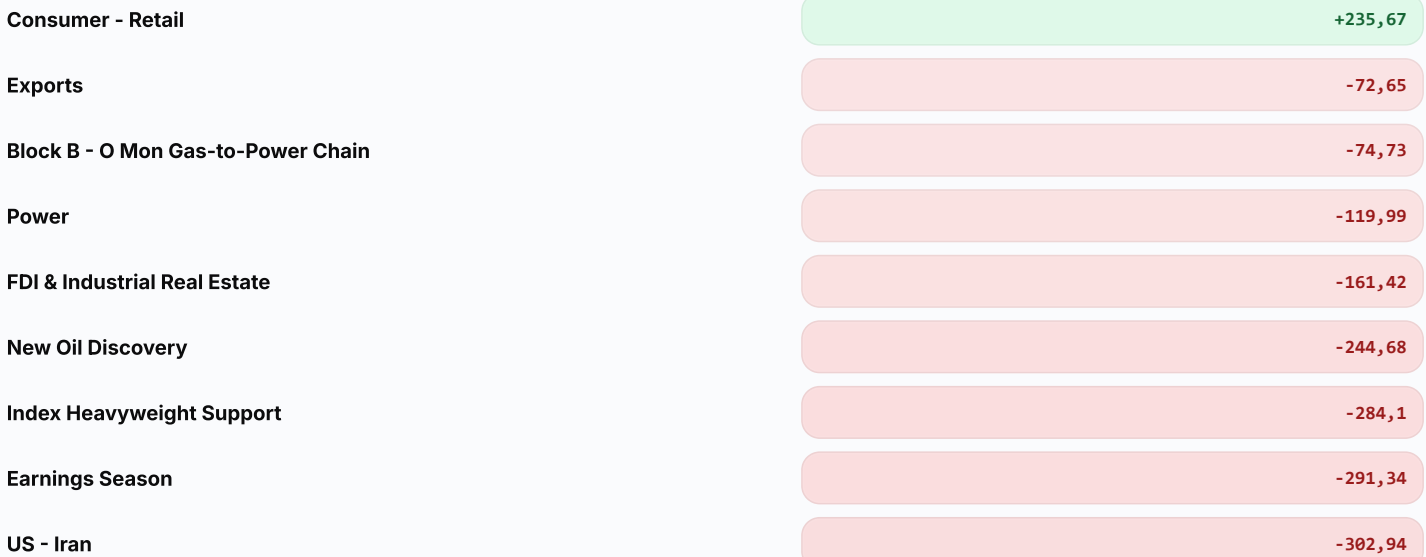
TIME FRAME  
27/05/2026 – 02/06/2026 (1 week)

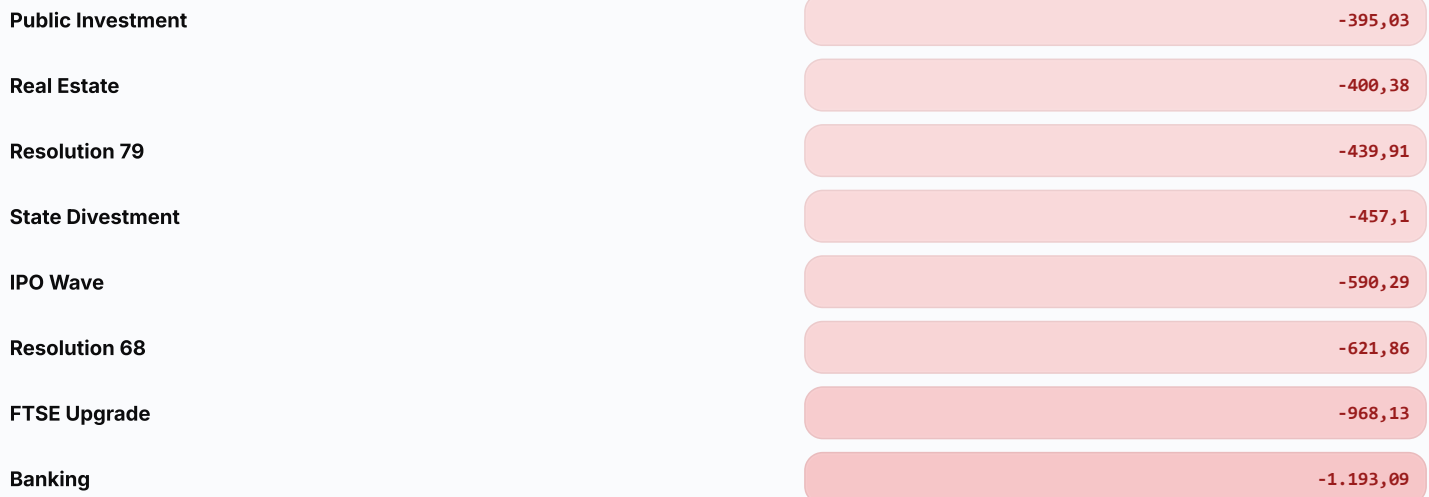
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## Foreign Flow Heatmap

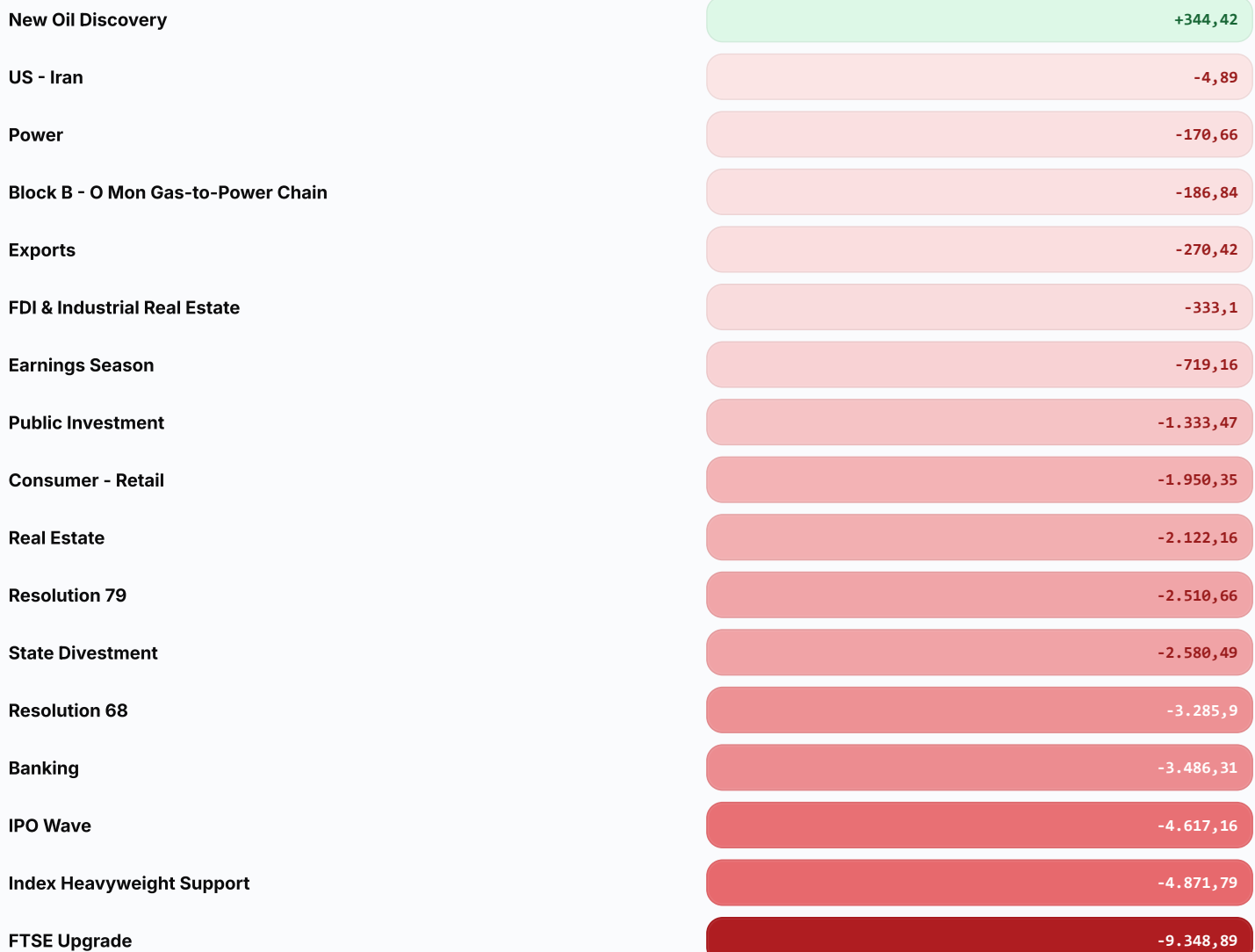
1 WEEK





### Domestic Flow Heatmap

📅 1 WEEK



Strong Negative Strong Positive

### Top Foreign Flows

🔍 TICKER RANKING

Ticker ranking based on cumulative values appearing in TOP\_BUY clusters in the foreign sheet.



**VCB****+628.5 bn**

#2


 5 mentions Index Heavyweight Support Resolution 79
**MWG****+418.0 bn**

#3


 2 mentions Consumer - Retail Resolution 68
**VNM****+228.3 bn**

#4


 3 mentions Consumer - Retail Index Heavyweight Support
**PVS****+114.3 bn**

#5


 3 mentions Block B - O Mon Gas-to-Power Cha New Oil Discovery
**PNJ****+46.2 bn**

#6


 2 mentions Consumer - Retail Resolution 68
**BCM****+33.0 bn**

#7


 3 mentions FDI & Industrial Real Estate Resolution 79
**BVH****+24.2 bn**

#8


 2 mentions Resolution 79 State Divestment
**SAB****+14.8 bn**

#9


 1 mentions FTSE Upgrade
**NLG****+12.1 bn**

#10


 1 mentions Real Estate
**Top Domestic Flows**

TICKER RANKING

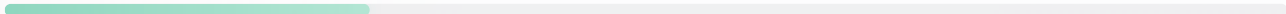
Ticker ranking based on cumulative values appearing in TOP\_BUY clusters in the domestic sheet.

**ACB****+3,734.0 bn**

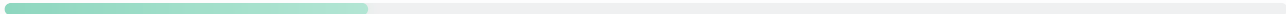
#1


 2 mentions Resolution 68 Banking
**GAS****+1,060.8 bn**


#2


 6 mentions New Oil Discovery US - Iran
**BSR****+1,057.2 bn**

#3


 4 mentions New Oil Discovery US - Iran
**TCB****+678.9 bn**

#4



3 mentions Resolution 68 Banking

FPT

+664.4 bn

#5

2 mentions Resolution 68 Index Heavyweight Support

PVS

+178.5 bn

#6

3 mentions New Oil Discovery US - Iran

BVH

+94.2 bn

#7

3 mentions Resolution 79 State Divestment

IDC

+38.3 bn

#8

1 mentions FDI & Industrial Real Estate

KDH

+27.8 bn

#9

1 mentions Real Estate

NT2

+18.6 bn

#10

1 mentions Power

## DISCLAIMER

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