

🕒 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	51,307.79	+228.91 (0.45%)
S&P 500 derived	7,609.78	+9.82 (0.13%)
Nasdaq	27,093.90	+7.09 (0.03%)
Small Cap 2000 derived	2,931.96	+26.2 (0.9%)
S&P 500 VIX derived	16.10	+0.33 (2.09%)
S&P/TSX	35,169.46	+434.57 (1.25%)

Source: Investing.com, Vietstock, compiled by ASEANSC

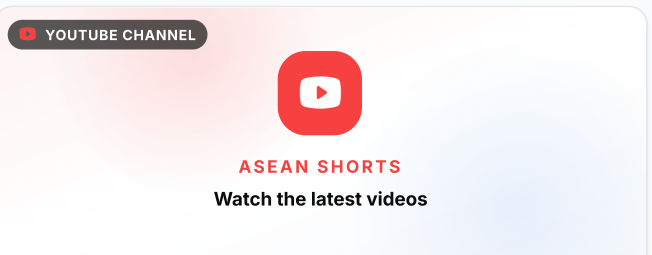
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Quick Market Update from ASEAN Securities



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🌐 INTERNATIONAL NEWS



Corporate update — Details are provided in the source article.

INTERNATIONAL NEWS

Updated at 15:38:52 · 03/06/2026



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DOMESTIC NEWS

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Market and economic update

ECONOMY - INVESTMENT | 21 minutes ago



Market and economic update

ECONOMY - INVESTMENT | 26 minutes ago



Market and economic update

ECONOMY - INVESTMENT | 1 hours ago



Market and economic update

MACRO | 3 hours ago



Market and economic update

ECONOMY - INVESTMENT | 4 hours ago



Market and economic update

ECONOMY - INVESTMENT | 4 hours ago

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

1,819.01

-0.41%

CHANGE

-7.46 pts

TRADING

16,869.2 bn | +452.9

VALUE

bn (+2.76%)

Advancers

173

Unchanged

62

Decliners

133

VN30

1,974.60

+0.08%

CHANGE

+1.61 pts

TRADING

11,376.0 bn | +1,321.3

VALUE

bn (+13.14%)

Advancers

20

Unchanged

3

Decliners

7

HNX-INDEX

317.48

+0.85%

CHANGE

+2.69 pts

TRADING

870.6 bn | -42.9 bn

VALUE

(-4.7%)

Advancers

Unchanged

Decliners

MARKET RECAP

The VN-Index closed down more than 7 points but showed constructive signals as buying demand improved notably in the second half of the afternoon session, helping the index recover from its intraday low and finish above its session average. Bottom-fishing flows entered actively on pullbacks, creating a firmer support base, further reinforced by positive breadth as advancers outnumbered decliners on HOSE and 20/30 VN30 constituents closed in green. Market liquidity edged higher, suggesting improving trading sentiment, while Securities, Oil & Gas, Power and Steel provided leadership. However, the rebound remained constrained by weakness in several large-cap stocks and foreign net selling of VND 519bn, concentrated mainly in ACB, VHM and VIC, leaving the market in a tug-of-war as it attempted to find equilibrium.

MARKET VIEW

From a technical perspective, the VN-Index moving around the MA10 and MA20, together with still-mixed signals from RSI and MFI, suggests that the short-term trend remains range-bound. In the coming sessions, the index is likely to continue testing the nearby 1,810–1,820 support zone before establishing a clearer direction. If pressure from large-cap stocks eases and money flows remain broad-based, the market could soon regain a more balanced setup. In the current context, short-term investors should not assess the market solely through index movements, but should also monitor breadth, sector flows and relative strength at the stock level. The appropriate strategy is to avoid chasing technical rebounds, maintain moderate exposure and prioritise stocks that hold constructive price bases and have idiosyncratic catalysts such as State divestment, market upgrade prospects, growth-supportive policies or the offshore cycle. Medium- to long-term investors can use volatility to accumulate fundamentally sound, liquid stocks gradually, especially those less exposed to the correction in heavyweight names.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 0/6

FOREIGN NET FLOWS OVER THE LAST SIX SESSIONS

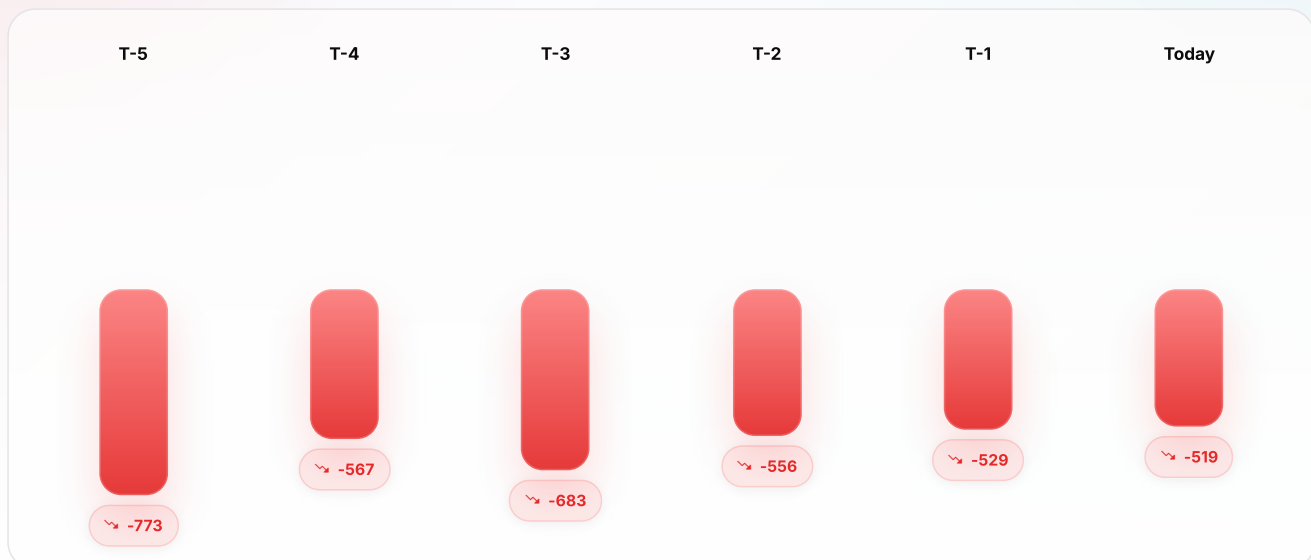
Today -519

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

Cumulative six-session net selling -3,627

Largest outflow -773

Reversal session None



Source: Algo, compiled by ASEANSC

Highlight: Foreign investors recorded cumulative net selling of VND 3,627bn 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	+562
SHB	+89
VIX	+54
NVL	+45
MBB	+23

TOP 5 NET SELLS



ACB	-390
VHM	-208
VIC	-163
VPB	-86
TCB	-84

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>VN-INDEX </p> <p>1,819.01 -0.41%</p> <p>CHANGE -7.46 pts</p> <p>TRADING VALUE 16,869.2 bn +452.9 bn (+2.76%)</p> <p>Advancers: 173 Unchanged: 62 Decliners: 133</p>	<p>VN30 </p> <p>1,974.60 +0.08%</p> <p>CHANGE +1.61 pts</p> <p>TRADING VALUE 11,376.0 bn +1,321.3 bn (+13.14%)</p> <p>Advancers: 20 Unchanged: 3 Decliners: 7</p>	<p>HNX-INDEX </p> <p>317.48 +0.85%</p> <p>CHANGE +2.69 pts</p> <p>TRADING VALUE 870.6 bn -42.9 bn (-4.7%)</p> <p>Advancers: Unchanged: Decliners:</p>
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MARKET RECAP

The VN-Index closed down more than 7 points but showed constructive signals as buying demand improved notably in the second half of the afternoon session, helping the index recover from its intraday low and finish above its session average. Bottom-fishing flows entered actively on pullbacks, creating a firmer support base, further reinforced by positive breadth as advancers outnumbered decliners on HOSE and 20/30 VN30 constituents closed in green. Market liquidity edged higher, suggesting improving trading sentiment, while Securities, Oil & Gas, Power and Steel provided leadership. However, the rebound remained constrained by weakness in several large-cap stocks and foreign net selling of VND 519bn, concentrated mainly in ACB, VHM and VIC, leaving the market in a tug-of-war as it attempted to find equilibrium.

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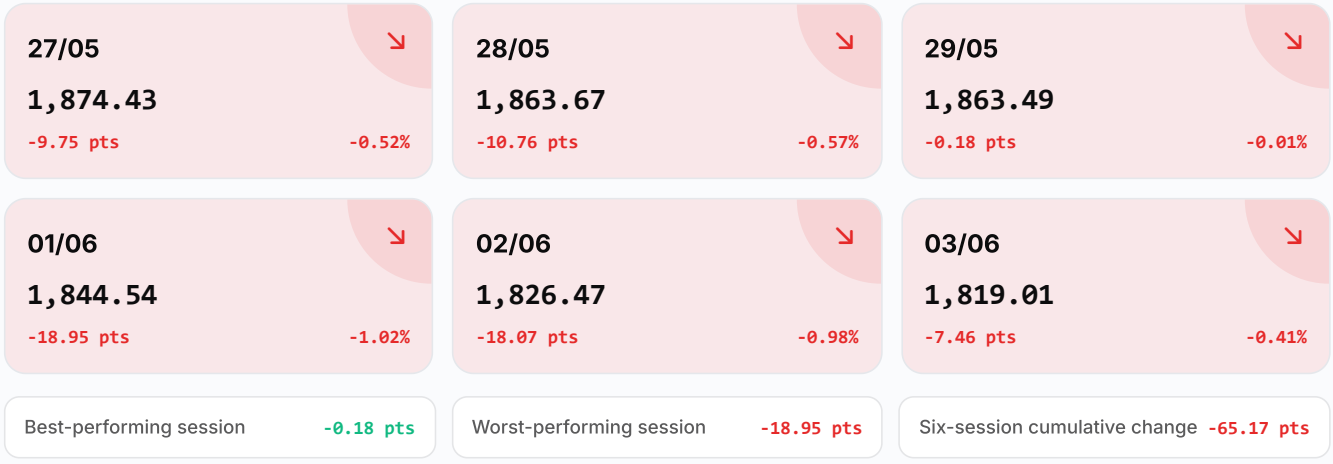
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prospects, growth-supportive policies or the offshore cycle. Medium- to long-term investors can use volatility to accumulate fundamentally sound, liquid stocks gradually, especially those less exposed to the correction in heavyweight names.

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



FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions 0/6

FOREIGN NET FLOWS OVER THE LAST SIX SESSIONS

↓ Today -519

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FLOW LEADERS

TOP FOREIGN TRADES

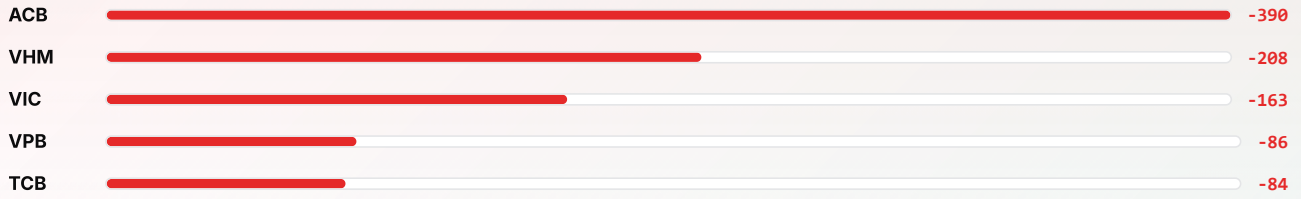
Top five net-buying and net-selling stocks in the session.

TOP 5 NET BUYS





TOP 5 NET SELLS



MONEY FLOW · HEATMAP

DOMESTIC VS. FOREIGN FLOW HEATMAP

TIME FRAME
28/05/2026 – 03/06/2026 (1 week)

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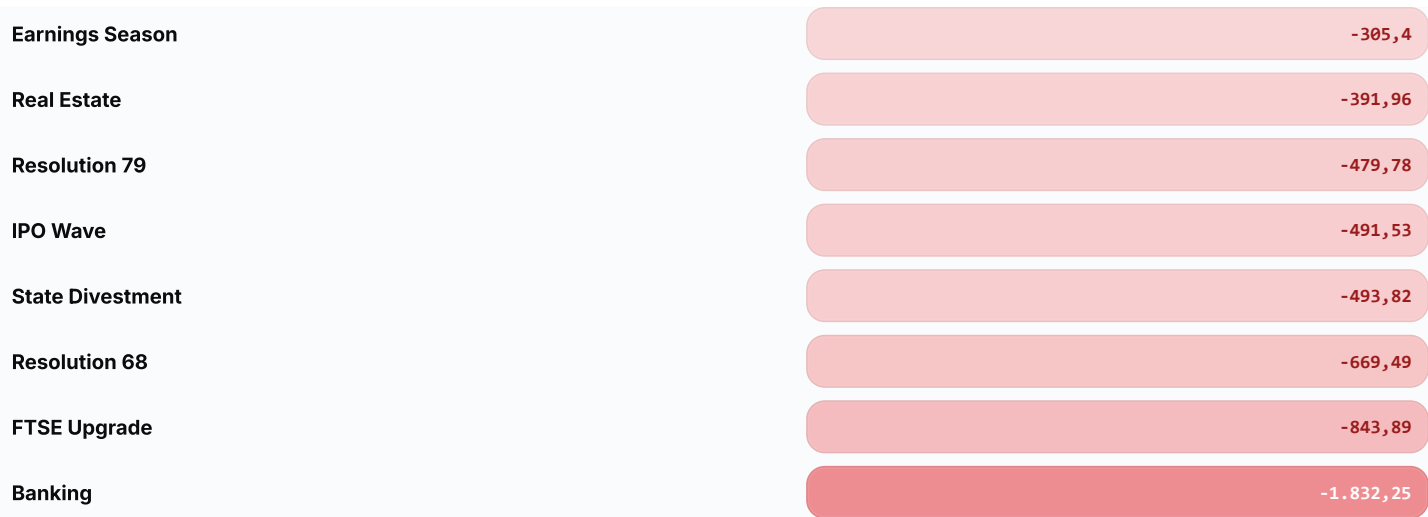
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A one-week view of domestic and foreign flow preferences across key investment themes.

Foreign Flow Heatmap

1 WEEK





Domestic Flow Heatmap

1 WEEK



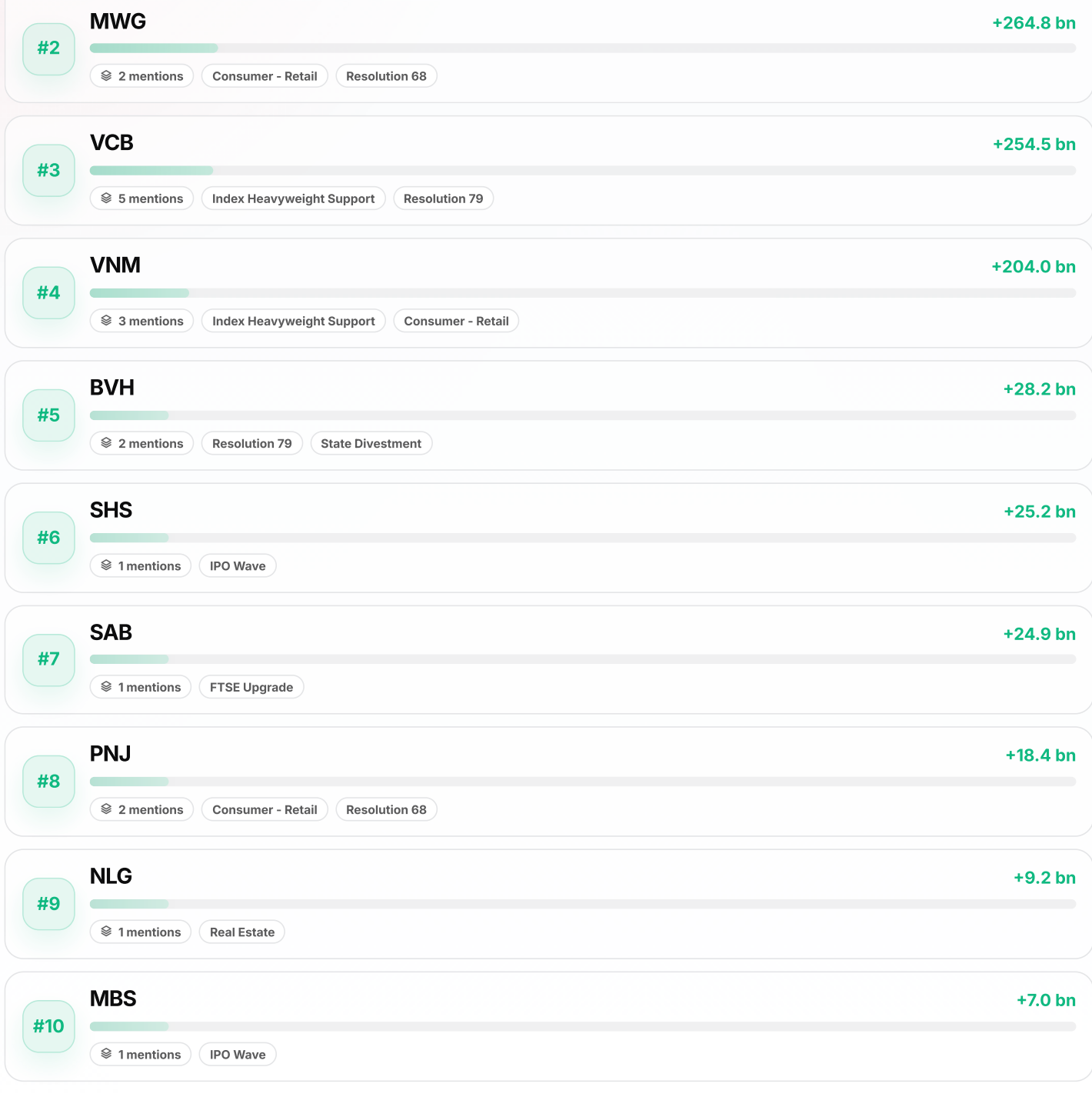
Strong Negative Strong Positive

Top Foreign Flows

TICKER RANKING

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

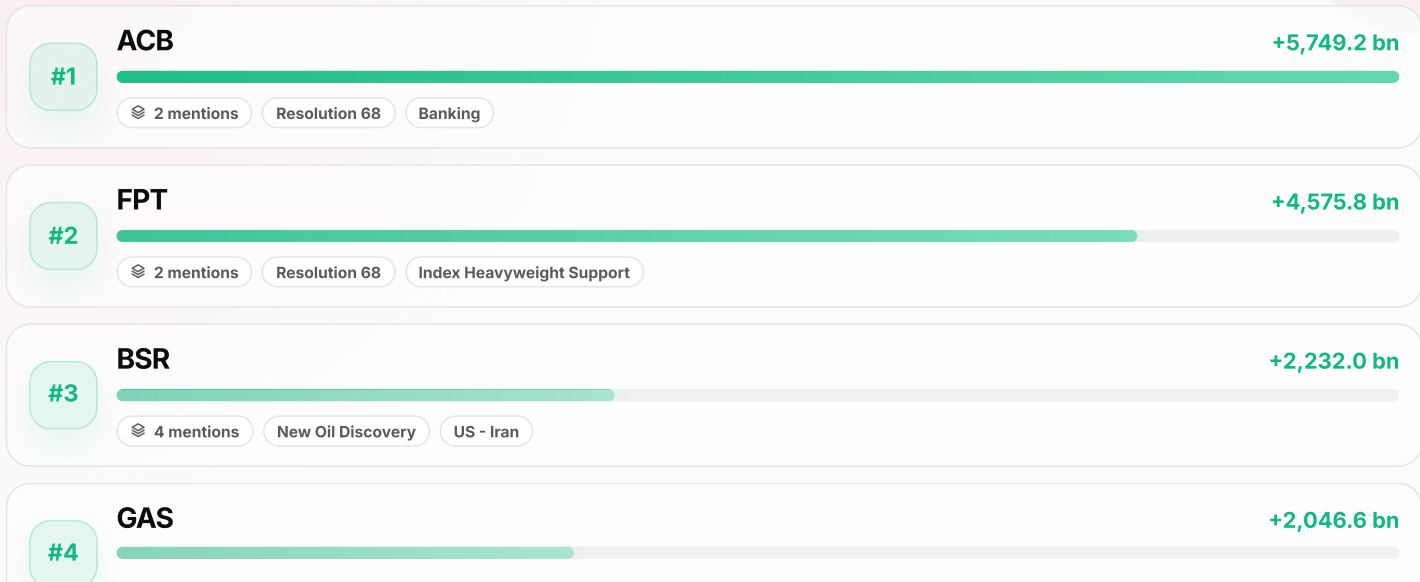




Top Domestic Flows

TICKER RANKING

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



6 mentions New Oil Discovery US - Iran

PVS

+474.6 bn

#5

3 mentions New Oil Discovery US - Iran

VIX

+453.2 bn

#6

1 mentions IPO Wave

PLX

+183.8 bn

#7

2 mentions Resolution 79 State Divestment

IDC

+104.4 bn

#8

1 mentions FDI & Industrial Real Estate

GVR

+91.8 bn

#9

1 mentions Index Heavyweight Support

BVH

+71.1 bn

#10

1 mentions FTSE Upgrade

DISCLAIMER

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