

🕒 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	50,687.07	-620.72 (-1.21%)
S&P 500 derived	7,553.68	-56.1 (-0.74%)
Nasdaq	26,853.98	-239.93 (-0.89%)
Small Cap 2000 derived	2,893.51	-38.45 (-1.31%)
S&P 500 VIX derived	16.44	+0.38 (2.37%)
S&P/TSX	34,801.54	-367.92 (-1.05%)

Source: Investing.com, Vietstock, compiled by ASEANSC

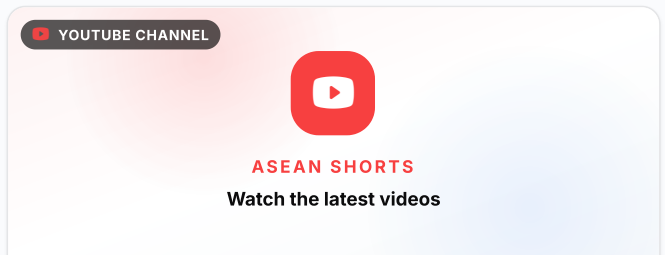
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FEATURED VIDEO

Quick Market Update from ASEAN Securities



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## 🌐 INTERNATIONAL NEWS



**Market and corporate update** — Details are provided in the source article.

INTERNATIONAL NEWS

Updated at 15:46:07 · 04/06/2026



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## DOMESTIC NEWS

 [Place Order](#)



**Market and economic update**

**NEWS** | 2 hours ago



**Market and economic update**

**ECONOMY - INVESTMENT** | 3 hours ago



**Market and economic update**

**MACRO** | 4 hours ago



**Market and economic update**

**NEWS** | Today



**Market and economic update**

**NEWS** | Today



**Market and economic update**

**NEWS** | Today

## CORPORATE NEWS

 [Place Order](#)



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# EVENTS CALENDAR

Upcoming corporate and macro events

07/2026

15

**TVM**

Cash dividend payment of VND 600/share

Dividend

06/2026

23

**SRC**

Cash dividend payment of VND 400/share

Dividend

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

12:00 PM · MID-SESSION



## MID-SESSION UPDATE

Morning market pulse, money flows and key index movements.

[Place Order](#)

[Research Center](#)

VN-INDEX

**1,831.55**

+0.69%

CHANGE

+12.54 pts

TRADING

12,907.7 bn | -4,005.4

VALUE

bn (-23.68%)

Advancers

140

Unchanged

62

Decliners

164

VN30

**1,982.29**

+0.39%

CHANGE

+7.69 pts

TRADING

8,486.0 bn | -2,866.7

VALUE

bn (-25.25%)

Advancers

19

Unchanged

1

Decliners

10

HNX-INDEX

**304.86**

-3.98%

CHANGE

-12.62 pts

TRADING

671.0 bn | -202.0 bn

VALUE

(-23.14%)

Advancers

Unchanged

Decliners

### MARKET RECAP

The VN-Index stayed in positive territory throughout the afternoon session and closed at the day's high, gaining nearly 13 points. This indicates that active buying demand dominated and market sentiment improved meaningfully. The advance was led by the VN30 basket, with 19 gainers, alongside strength in Seaports and Oil & Gas. However, market breadth remained less constructive, with 164 decliners on HOSE, while heavy foreign net selling of VND 5,791bn concentrated in large-cap names such as VIC, MWG and ACB. Notably, liquidity fell sharply versus the previous session, reflecting cautious sentiment and more selective capital deployment in a differentiated market. Investors should therefore focus on stock selection rather than expecting broad-based index confirmation.

## MARKET VIEW

Technically, the VN-Index is sending mixed signals as today's rebound was not sufficient to reverse the prevailing downtrend, with the index still closing below the MA10 and MA20 while momentum indicators such as RSI and MFI remained weak. Although buyers dominated the session and pushed the close near the intraday high, liquidity has yet to break out, leaving the short-term base case tilted toward range-bound trading before a clearer trend is confirmed. The optimal strategy is to maintain moderate portfolio exposure, avoid chasing rebounds and monitor the index's reaction around the 1,830–1,840 support zone and the 1,850–1,860 resistance zone. Short-term investors should prioritise stocks with idiosyncratic catalysts such as State divestment, economic development resolutions, market upgrade prospects or the offshore cycle. Medium- to long-term investors can use pullbacks toward medium-term support areas to accumulate fundamentally sound, liquid stocks in Banking, Securities, Retail, Public Investment and Oil & Gas.

### FOREIGN FLOW SPOTLIGHT

Net-buying sessions 0/6

## FOREIGN NET FLOWS OVER THE LAST SIX SESSIONS

Today -5.791

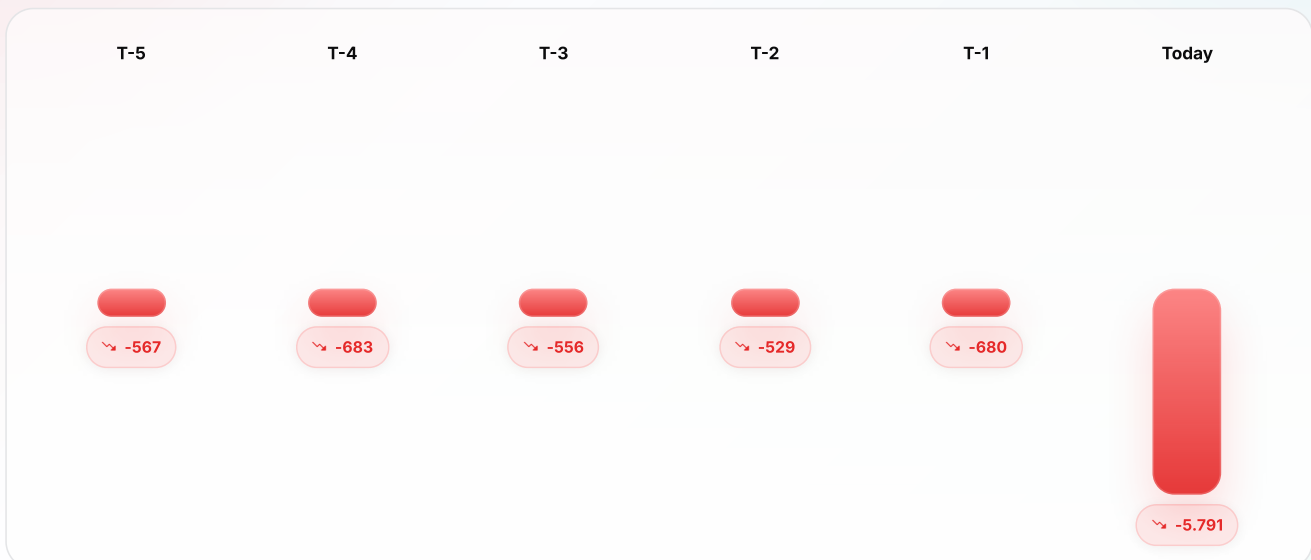
Unit: VND bn · Green bars indicate net buying; red bars indicate net selling · The midline marks the neutral level.

Cumulative six-session net selling -8.806

Largest outflow -5.791

Reversal session

None



Source: Algo, compiled by ASEANSC

Highlight: Foreign investors recorded cumulative net selling of VND 8,806bn 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	+255
SHB	+33
PLX	+18
VPI	+10
NVL	+9

### TOP 5 NET SELLS

VIC		-4.932
MWG		-95
ACB		-92
VPB		-82
VHM		-80

15:30 PM · MARKET CLOSE



# MARKET CLOSE

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

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[Research Center](#)

## MARKET INDEX SUMMARY

<p><b>VN-INDEX</b> </p> <p><b>1,831.55</b> <span style="color: green;">+0.69%</span></p> <p>CHANGE <span style="color: green;">+12.54 pts</span></p> <p>TRADING VALUE <span style="color: red;">12,907.7 bn   -4,005.4 bn (-23.68%)</span></p> <p> <span style="color: green; border: 1px solid green; border-radius: 10px; padding: 2px;">Advancers 140</span> <span style="border: 1px solid gray; border-radius: 10px; padding: 2px; margin-left: 10px;">Unchanged 62</span> <span style="color: red; border: 1px solid red; border-radius: 10px; padding: 2px; margin-left: 10px;">Decliners 164</span> </p>	<p><b>VN30</b> </p> <p><b>1,982.29</b> <span style="color: green;">+0.39%</span></p> <p>CHANGE <span style="color: green;">+7.69 pts</span></p> <p>TRADING VALUE <span style="color: red;">8,486.0 bn   -2,866.7 bn (-25.25%)</span></p> <p> <span style="color: green; border: 1px solid green; border-radius: 10px; padding: 2px;">Advancers 19</span> <span style="border: 1px solid gray; border-radius: 10px; padding: 2px; margin-left: 10px;">Unchanged 1</span> <span style="color: red; border: 1px solid red; border-radius: 10px; padding: 2px; margin-left: 10px;">Decliners 10</span> </p>	<p><b>HNX-INDEX</b> </p> <p><b>304.86</b> <span style="color: red;">-3.98%</span></p> <p>CHANGE <span style="color: red;">-12.62 pts</span></p> <p>TRADING VALUE <span style="color: red;">671.0 bn   -202.0 bn (-23.14%)</span></p> <p> <span style="color: green; border: 1px solid green; border-radius: 10px; padding: 2px;">Advancers</span> <span style="border: 1px solid gray; border-radius: 10px; padding: 2px; margin-left: 10px;">Unchanged</span> <span style="color: red; border: 1px solid red; border-radius: 10px; padding: 2px; margin-left: 10px;">Decliners</span> </p>
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## MARKET RECAP

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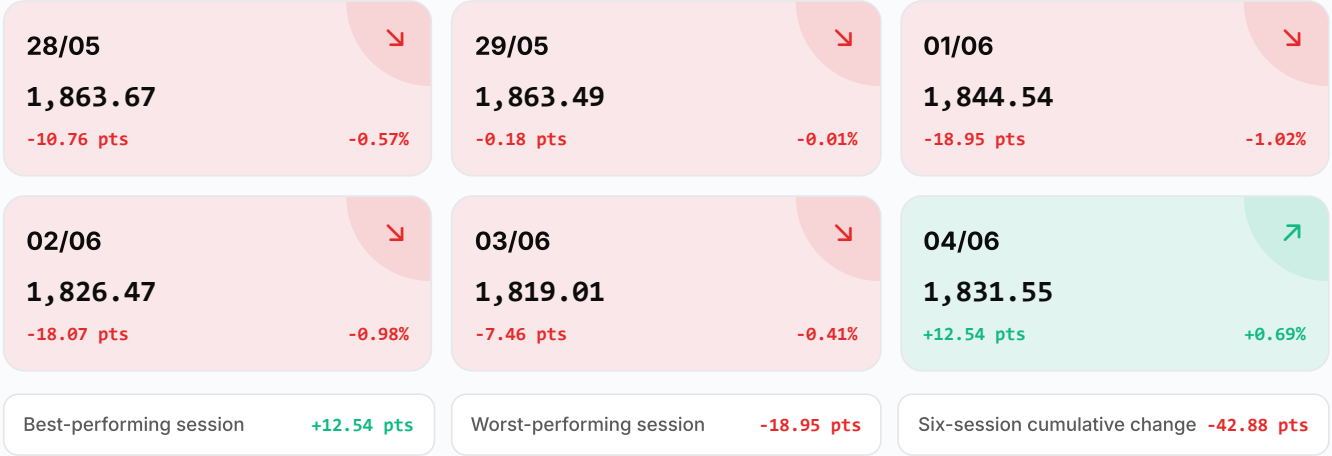
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Technically, the VN-Index is sending mixed signals as today's rebound was not sufficient to reverse the prevailing downtrend, with the index still closing below the MA10 and MA20 while momentum indicators such as RSI and MFI remained weak. Although buyers dominated the session and pushed the close near the intraday high, liquidity has yet to break out, leaving the short-term base case tilted toward range-bound trading before a clearer trend is confirmed. The optimal strategy is to maintain moderate portfolio exposure, avoid chasing rebounds and monitor the index's reaction around the 1,830–1,840 support zone and the 1,850–1,860 resistance zone. Short-term investors should prioritise stocks with idiosyncratic catalysts such as State divestment, economic development resolutions, market upgrade prospects or the offshore cycle. Medium- to long-term investors can use pullbacks toward medium-term support areas to accumulate fundamentally sound, liquid stocks in Banking, Securities, Retail, Public Investment and Oil & Gas.

## 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 -5.791

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



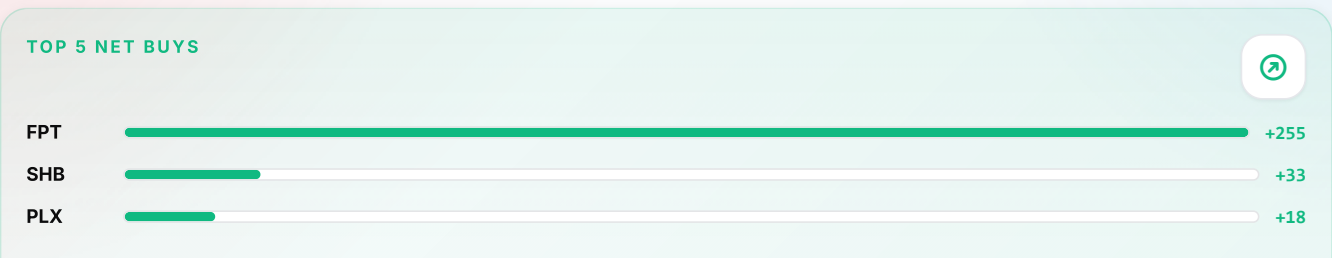
Source: Algo, compiled by ASEANSC

Highlight: Foreign investors recorded cumulative net selling of VND 8,806bn 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.



VPI	<div style="width: 100%;"><div style="width: 10%;"></div></div>	+10
NVL	<div style="width: 100%;"><div style="width: 10%;"></div></div>	+9

TOP 5 NET SELLS



VIC	<div style="width: 100%;"><div style="width: 95%;"></div></div>	-4.932
MWG	<div style="width: 100%;"><div style="width: 10%;"></div></div>	-95
ACB	<div style="width: 100%;"><div style="width: 10%;"></div></div>	-92
VPB	<div style="width: 100%;"><div style="width: 10%;"></div></div>	-82
VHM	<div style="width: 100%;"><div style="width: 10%;"></div></div>	-80

MONEY FLOW · HEATMAP

# DOMESTIC VS. FOREIGN FLOW HEATMAP



TIME FRAME  
29/05/2026 – 04/06/2026 (1 week)

[Place Order](#)

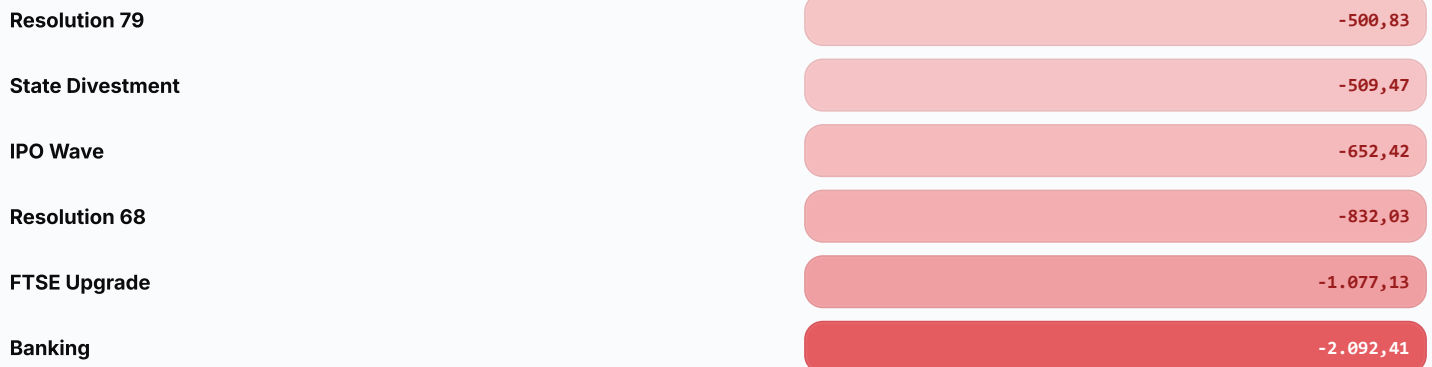
[Research Center](#)

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

## Foreign Flow Heatmap

1 WEEK

Index Heavyweight Support	<div style="width: 100%;"><div style="width: 234.63%;"></div></div>	+234,63
Exports	<div style="width: 100%;"><div style="width: -63.41%;"></div></div>	-63,41
Power	<div style="width: 100%;"><div style="width: -93.76%;"></div></div>	-93,76
Block B - O Mon Gas-to-Power Chain	<div style="width: 100%;"><div style="width: -108.44%;"></div></div>	-108,44
FDI & Industrial Real Estate	<div style="width: 100%;"><div style="width: -162.5%;"></div></div>	-162,5
New Oil Discovery	<div style="width: 100%;"><div style="width: -179.99%;"></div></div>	-179,99
Public Investment	<div style="width: 100%;"><div style="width: -183.45%;"></div></div>	-183,45
Consumer - Retail	<div style="width: 100%;"><div style="width: -260.4%;"></div></div>	-260,4
US - Iran	<div style="width: 100%;"><div style="width: -262.67%;"></div></div>	-262,67
Earnings Season	<div style="width: 100%;"><div style="width: -324.91%;"></div></div>	-324,91
Real Estate	<div style="width: 100%;"><div style="width: -474.02%;"></div></div>	-474,02



### 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.

#1

FPT

+2,690.6 bn

🗨️ 2 mentions

Index Heavyweight Support

Resolution 68

#2	<b>BVH</b>	+62.8 bn	4 mentions	Index Heavyweight Support	Resolution 79
#3	<b>VCB</b>	+51.5 bn	5 mentions	Index Heavyweight Support	Resolution 79
#4	<b>SAB</b>	+29.5 bn	1 mentions	FTSE Upgrade	
#5	<b>SHS</b>	+25.3 bn	1 mentions	IPO Wave	
#6	<b>PVS</b>	+17.4 bn	3 mentions	Block B - O Mon Gas-to-Power Cha	New Oil Discovery
#7	<b>CTD</b>	+8.6 bn	1 mentions	Public Investment	
#8	<b>VIX</b>	+4.2 bn	1 mentions	IPO Wave	
#9	<b>HVN</b>	+4.1 bn	1 mentions	State Divestment	
#10	<b>MBS</b>	+3.1 bn	1 mentions	IPO Wave	

## Top Domestic Flows

TICKER RANKING

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

#1	<b>ACB</b>	+9,688.0 bn	2 mentions	Resolution 68	Banking
#2	<b>FPT</b>	+3,705.4 bn	2 mentions	Resolution 68	Index Heavyweight Support
#3	<b>GAS</b>	+1,818.0 bn	6 mentions	New Oil Discovery	US - Iran
#4	<b>VIX</b>	+1,512.1 bn			

1 mentions IPO Wave

#5

**BSR**

+1,434.4 bn

4 mentions New Oil Discovery US - Iran

#6

**PLX**

+1,322.0 bn

4 mentions New Oil Discovery US - Iran

#7

**HDB**

+875.0 bn

2 mentions Resolution 68 Banking

#8

**GVR**

+273.8 bn

1 mentions Index Heavyweight Support

#9

**VJC**

+253.8 bn

1 mentions FTSE Upgrade

#10

**GEX**

+236.7 bn

1 mentions FTSE Upgrade

## DISCLAIMER

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