

🕒 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	51,561.93	+874.86 (1.73%)
S&P 500 derived	7,584.31	+30.63 (0.41%)
Nasdaq	26,830.96	-23.02 (-0.09%)
Small Cap 2000 derived	2,935.86	+42.35 (1.46%)
S&P 500 VIX derived	15.74	+0.34 (2.21%)
S&P/TSX	35,217.06	+415.52 (1.19%)

Source: Investing.com, Vietstock, ASEANSC

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FEATURED VIDEO

Quick market updates from ASEAN Securities



YOUTUBE CHANNEL



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🌐 GLOBAL NEWS



HSBC Switzerland investigated in USD300mn Lebanon central bank scandal — French prosecutors have filed preliminary charges against HSBC's Swiss unit in an investigation involving the former Governor of Lebanon's central bank...



The madness of companies forcing employees to burn money on AI — The global technology boom is pushing large corporations toward an irrational management trend that uses token-resource spending as a measure of employee capability...

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026



South Korea: Second-longest current-account surplus streak on record — South Korea's current-account surplus reached USD28.29bn in April, down from the record USD37.93bn in March but still sharply higher...

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026



Could the Iran war push the world past peak oil demand? — Oil demand in China has declined sharply since the Iran-related conflict erupted, even though the world's second-largest economy has not entered a recession...

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026



Goldman Sachs delivers a bold forecast for SpaceX's AI business — SpaceX's targeted USD1.78tn valuation in its upcoming IPO is largely based on expectations that its AI business will post explosive growth in the coming years...

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026



WTI crude falls more than 3% — Oil prices dropped around 3% on June 4 after reports suggested US President Donald Trump did not want to restart a war...

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026



Gold gains more than 1%, returns to USD4,500 — Gold prices rose over 1% on June 4 as oil fell on expectations that the Iran-related conflict could soon end, thereby putting pressure...

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026



Rotation out of technology lifts Dow Jones nearly 900 points — The Dow Jones surged to a fresh record high on June 4, while the Nasdaq Composite underperformed as investors appeared to rotate...

GLOBAL NEWS | Updated at 15:42:39 · 05/06/2026

VIETNAM NEWS

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Vietnam charts its own path toward becoming a financial center

MACRO | 54 minutes ago



Ten sugar-industry biomass power plants idle for up to eight months a year

ECONOMY & INVESTMENT | 1 hour ago



LG to build semiconductor substrate plant in Hai Phong spanning the equivalent of 45 football fields

ECONOMY & INVESTMENT | 3 hours ago



Vietnam targets at least USD55bn in annual digital-technology export revenue by 2030

ECONOMY & INVESTMENT | 4 hours ago



Vietnam International Financial Center: Which products are needed to create a breakthrough?

NEWS | Today



Targeting full expansion of the North-South Expressway by 2030

NEWS | Today

CORPORATE NEWS

[Trade Now](#)



CMG appoints new CEO — CMC Corporation (HOSE: CMG) announced the appointment of Mr. Dang Tung Son as Chief Executive Officer and legal representative...

CORPORATE NEWS | Updated at 15:42:39 · 05/06/2026



Nam Tan Uyen sets lowest 2026 profit target in eight years — Nam Tan Uyen adopted a cautious 2026 business plan with NPAT of more than VND226bn, down 30% YoY and the lowest level since 2018...

CORPORATE NEWS | Updated at 15:42:39 · 05/06/2026



BAF approves issuance of 60 million shares — On June 4, BAF Vietnam Agriculture JSC (HOSE: BAF) announced a dividend-share and bonus-share issuance totaling more than...

CORPORATE NEWS | Updated at 15:42:39 · 05/06/2026



ASG targets 18% net profit growth — ASG Corporation's Board (HOSE: ASG) approved its 2026 business plan, targeting revenue growth of 13% and net profit growth of 18%...

CORPORATE NEWS | Updated at 15:42:39 · 05/06/2026



ESOP wave spreads across the Masan ecosystem — Masan Group's Board (HOSE: MSN) approved an employee stock option plan. However...

CORPORATE NEWS | Updated at 15:42:39 · 05/06/2026



DDG to move to UPCoM on June 25; targets a return to profitability in 2026 — The Hanoi Stock Exchange (HNX) announced that nearly 80 million DDG shares will move to UPCoM registration from June 25, 2026...

CORPORATE NEWS | Updated at 15:42:39 · 05/06/2026



EVENTS CALENDAR

Upcoming corporate and macro events

07/2026

15

BBM

Cash dividend of VND300/share

Dividend

07/2026

22

DHC

Cash dividend of VND1,000/share

Dividend

06/2026

29

DFC

Cash dividend of VND3,900/share

Dividend

06/2026

23

ACB

Cash dividend of VND700/share

Dividend

07/2026

03

IDP

Cash dividend of VND2,000/share

Dividend

07/2026

03

IDP

Cash dividend of VND8,000/share

Dividend



MID-SESSION UPDATE

Morning market pulse, money flows, and key index movements.

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VN-INDEX ▲

1,838.90 +0.4%

CHANGE +7.35 pts

TURNOVER VND12,209.0bn | - VND768.2bn (-5.92%)

Advancers
95

Unchanged
64

Decliners
203

VN30 ▲

1,986.28 +0.2%

CHANGE +3.99 pts

TURNOVER VND8,117.1bn | - VND354.7bn (-4.19%)

Advancers
10

Unchanged
3

Decliners
17

HNX-INDEX ▼

293.79 -3.63%

CHANGE -11.07 pts

TURNOVER VND719.7bn | +VND46.8bn (+6.95%)

Advancers

Unchanged

Decliners

MARKET RECAP

The VN-Index remained in positive territory for most of the session and closed 7.35 points higher, above the session average, indicating that buying demand retained the upper hand despite late-session volatility. The recovery was reinforced by VN30 leadership and foreign inflows, with foreign investors recording net buying of VND318bn, concentrated in large-cap names such as VIC, ACB, and FPT. However, market performance remained highly divergent as pullbacks in Power, Securities, and Industrial Parks capped the advance, leaving market breadth negative with 203 decliners on the HOSE. Turnover also eased slightly from the previous session, reflecting investor caution near resistance, although overall sentiment improved markedly from the preceding period.

OUR VIEW

From a technical perspective, the VN-Index remains neutral with a short-term downside bias, closing at 1,839 below MA10 and MA20, while RSI (44) and MFI (22) indicate weakening momentum and money flow. Although intraday demand improved and helped the index close above its opening level, limited breadth and confirmation suggest that the current rebound is not yet sustainable, leaving open the risk of a retest of nearby support. In our base case, the market is likely to trade sideways within a narrow range early in the next session before establishing a clearer direction later in the day. For short-term investors, we recommend maintaining moderate equity exposure, avoiding chasing rebounds, and trading within the 1,830–1,840 support zone and 1,850–1,860 resistance zone. Focus should remain on stocks with idiosyncratic catalysts, including State divestments, market upgrade prospects, economic development resolutions, and the offshore cycle. Medium- to long-term investors can gradually accumulate fundamentally sound, liquid names in Banking, Securities, Retail, Public Investment, and Oil & Gas on pullbacks toward medium-term support.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

Today +318

FOREIGN NET FLOWS OVER SIX SESSIONS

Unit: VND bn · Green bars indicate net buying; red bars indicate net selling · The center line marks breakeven.

Six-session cumulative net selling **-7.873**

Largest daily move **-5.743**

Reversal session **Today**

T-5

T-4

T-3

T-2

T-1

Today



Source: Algo, ASEANSC

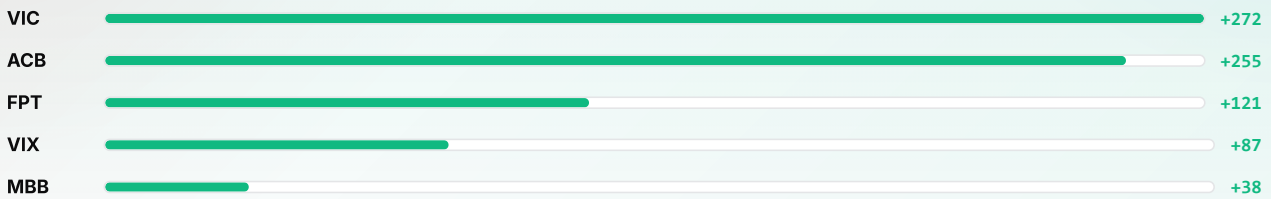
Key takeaway: Foreign investors recorded cumulative net selling of VND7,873bn over six sessions, with net selling in five of the six sessions.

FLOW LEADERS

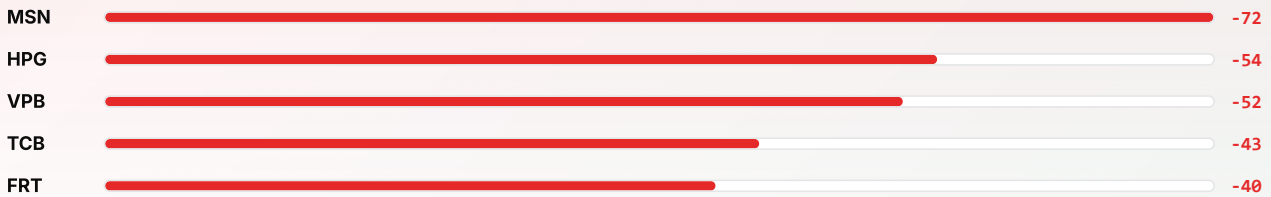
TOP FOREIGN TRADES

Top five net-bought and net-sold stocks during the session.

TOP 5 NET BUYS



TOP 5 NET SELLS



15:30 PM · MARKET CLOSE



MARKET CLOSE

Session recap, market outlook, and key data highlights.

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MARKET SNAPSHOT

<p>VN-INDEX</p> <p>1,838.90</p> <p>CHANGE +0.4% +7.35 pts</p>	<p>VN30</p> <p>1,986.28</p> <p>CHANGE +0.2% +3.99 pts</p>	<p>HNX-INDEX</p> <p>293.79</p> <p>CHANGE -3.63% -11.07 pts</p>
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TURNOVER VND12,209.0bn | - VND768.2bn (-5.92%)

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Unchanged
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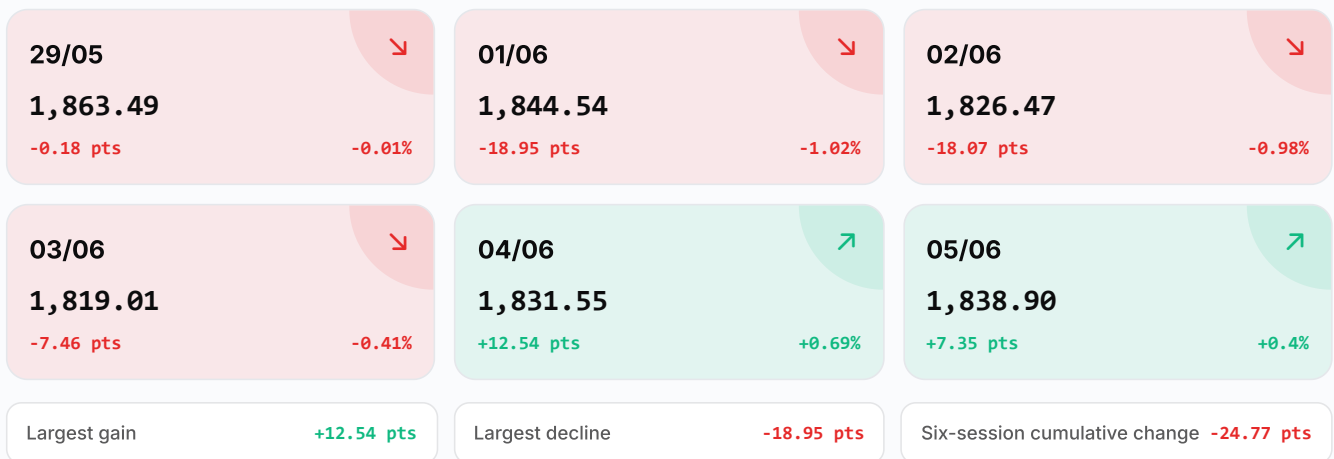
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VN-INDEX PERFORMANCE OVER THE LAST SIX SESSIONS

Each tile represents one session | Closing level and change versus the previous session

● ADVANCERS ● DECLINERS ● FLAT



FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

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Today +318

Six-session cumulative net selling -7.873

Largest daily move -5.743

Reversal session Today



Source: Algo, ASEANSC

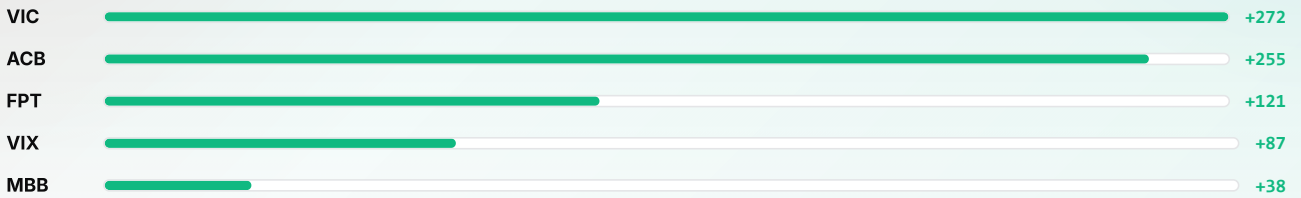
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FLOW LEADERS

TOP FOREIGN TRADES

Top five net-bought and net-sold stocks during the session.

TOP 5 NET BUYS



TOP 5 NET SELLS





DOMESTIC-FOREIGN FLOW HEATMAP

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

TIME FRAME

01/06/2026 – 05/06/2026 (1 week)

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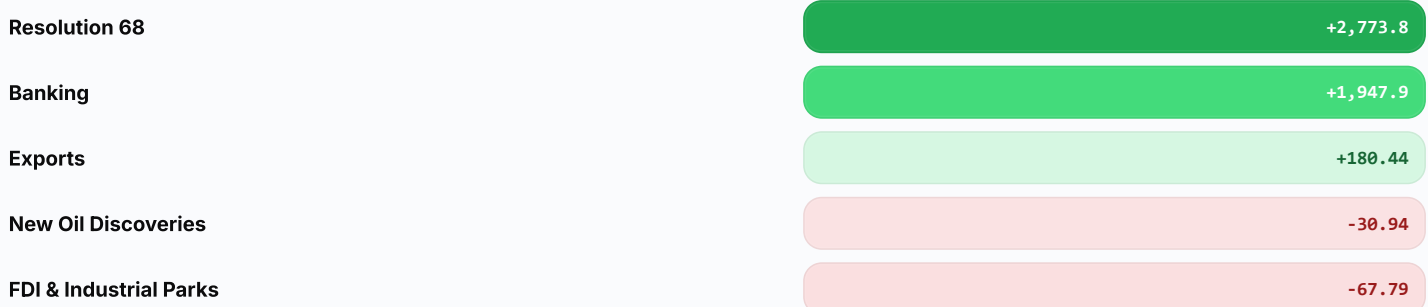
Foreign Flow Heatmap

🕒 1 WEEK



Domestic Flow Heatmap

🕒 1 WEEK



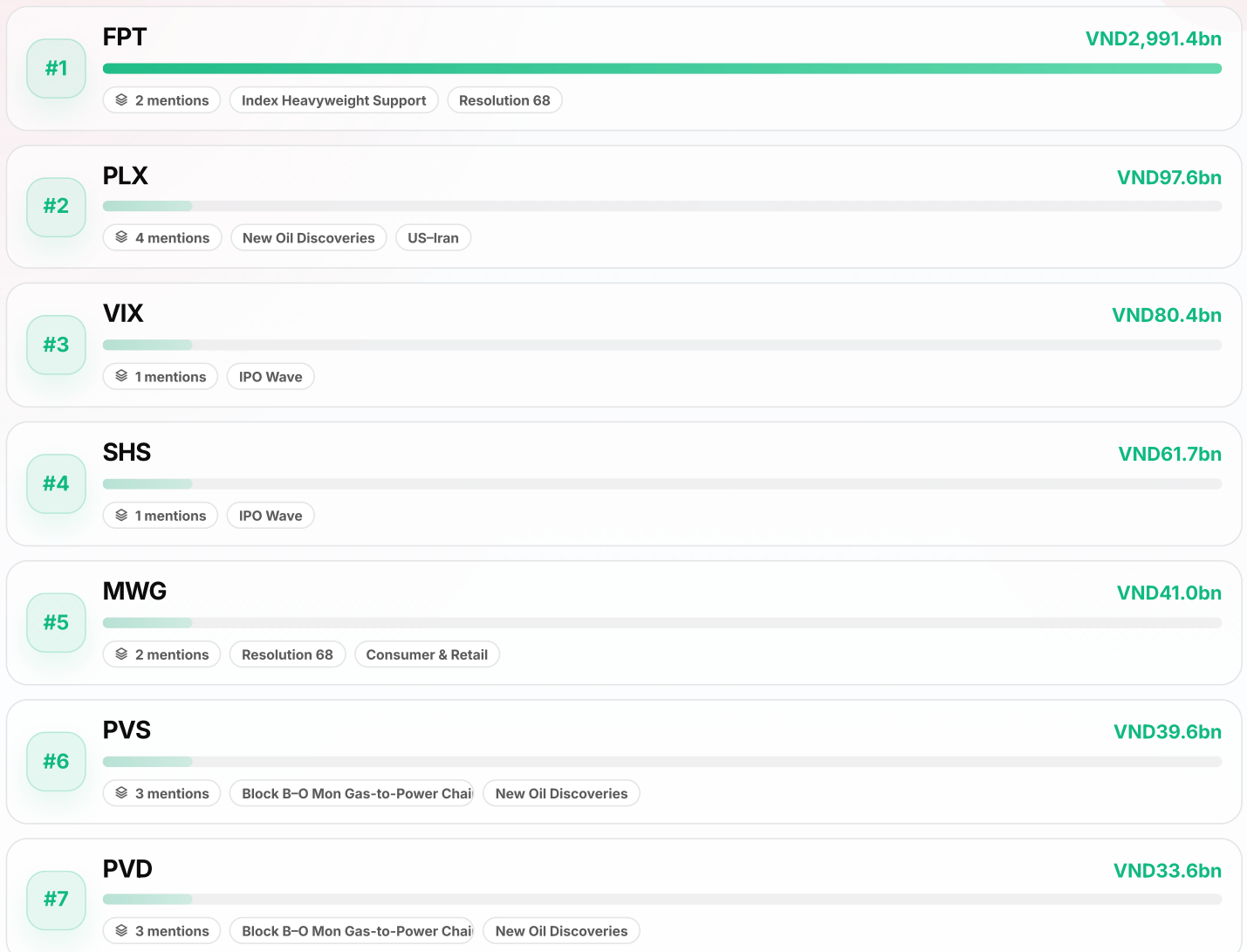


Strongly Negative Strongly Positive

Top Foreign Inflows

TICKER RANKING

Ranks stocks by the cumulative value of appearances in TOP_BUY clusters on the foreign sheet.



SAB

VND30.3bn

#8

1 mentions FTSE Upgrade

BVH

VND28.8bn

#9

4 mentions Index Heavyweight Support Resolution 79

POW

VND24.0bn

#10

5 mentions Power Block B-O Mon Gas-to-Power Chair

Top Domestic Inflows

TICKER RANKING

Ranks stocks by the cumulative value of appearances in TOP_BUY clusters on the domestic sheet.

ACB

VND6,750.8bn

#1

2 mentions Resolution 68 Banking

PLX

VND1,220.0bn

#2

4 mentions New Oil Discoveries Resolution 79

FPT

VND942.0bn

#3

2 mentions Resolution 68 Index Heavyweight Support

VJC

VND864.0bn

#4

2 mentions Resolution 68 FTSE Upgrade

VCB

VND813.0bn

#5

5 mentions Banking Resolution 79

GVR

VND273.0bn

#6

3 mentions Resolution 79 State Divestments

GEX

VND256.7bn

#7

1 mentions FTSE Upgrade

GMD

VND245.8bn

#8

1 mentions Exports

HDB

VND215.5bn

#9

1 mentions Banking

VND

VND204.2bn

#10

DISCLAIMER

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