

08:00 AM · PRE-MARKET



MORNING BRIEF

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

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Research Center

US EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	50,866.78	-695.15 (-1.35%)
S&P 500 derived	7,383.74	-200.57 (-2.64%)
Nasdaq	25,709.43	-1121.53 (-4.18%)
Small Cap 2000 derived	2,833.50	-101.83 (-3.47%)
S&P 500 VIX derived	19.90	-1.67 (-7.74%)
S&P/TSX	34,413.45	-803.61 (-2.28%)

Source: Investing.com, Vietstock, ASEANSC

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GLOBAL NEWS



Foreign investors flee the world's best-performing stock market — South Korea has been one of the world's strongest equity markets this year, but the overheated rally is now forcing many foreign funds to...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026



Trump pressures new Fed Chair, calls for rate cuts — US President Donald Trump publicly opposed the prospect of the Federal Reserve raising interest rates, just days after a positive jobs report...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026



Oil prices rise more than 3% as Iran-Israel conflict escalates — Oil prices surged on June 8 as Middle East tensions continued to intensify following military operations between Iran and Israel...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026



Kospi plunges more than 8%; South Korea triggers circuit breaker — Renewed tensions between Iran and Israel raised concerns that the US-Iran ceasefire could collapse, while markets remained highly volatile...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026



Boeing pledges after-sales support for China's 200-aircraft order — China will face no obstacles in accessing components required for the agreement, provided those parts are...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026



100 days of the Iran conflict: How have global markets and the economy changed? — The Middle East conflict entered its 100th day, continuing to drive major volatility across most asset classes, from equities and bonds to...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026



Paradox in the world's greenest country: Rural opposition to solar power — Once viewed as a model for the green transition, Denmark — one of the countries with the world's highest shares of renewable electricity — is now...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026



A rare event hits global financial markets — A rare development emerged across global financial markets as gold, US equities, Bitcoin, and oil all plunged in a single session...

GLOBAL NEWS | Updated at 15:31:39 · 08/06/2026

VIETNAM NEWS

 Trade Now



Proposal to upgrade over 80 km of Cao Lanh-Rach Soi Expressway by Q1 2028

ECONOMY & INVESTMENT | 48 minutes ago



Entire North-South Expressway proposed for expansion to six lanes, with construction targeted for 2027

ECONOMY & INVESTMENT | 57 minutes ago



From seaports and airports to an International Financial Center: How much value should Vietnam retain?

MACRO | 2 hours ago



HCMC: From national economic engine to an Asian benchmark city

ECONOMY & INVESTMENT | 4 hours ago



Government calls for focused removal of bottlenecks to drive double-digit economic growth in 2026

NEWS | Today



Leaders of Laos and Timor-Leste arrive in Hanoi ahead of AFF 2026

NEWS | Today



Dien May Xanh's 5M revenue rises 33% — Dien May Xanh Investment JSC (DMX) reported 5M 2026 cumulative revenue of more than VND54.6tn, up 33% YoY...

CORPORATE NEWS | Updated at 15:31:39 · 08/06/2026



EVNGENCO3 reschedules its 2026 AGM — Under a resolution announced on June 5, Power Generation Corporation 3 (EVNGENCO3, HOSE: PGV) postponed its AGM by one week from the previous plan.

CORPORATE NEWS | Updated at 15:31:39 · 08/06/2026



NKG resumes stock dividend after four years — Nam Kim Steel JSC (HOSE: NKG) will issue nearly 44.8 million shares to pay a 10% stock dividend for 2025. The ex-rights date is June 17.

CORPORATE NEWS | Updated at 15:31:39 · 08/06/2026



Vietjet shareholders to receive over 177 million new shares — Vietjet Aviation JSC (HOSE: VJC) announced June 16 as the ex-rights date for its 2025 stock dividend.

CORPORATE NEWS | Updated at 15:31:39 · 08/06/2026



TCBS appoints new CEO — Techcom Securities (TCBS, HOSE: TCX) relieved Ms. Nguyen Thi Thu Hien of her CEO role and reassigned her as Deputy Chair...

CORPORATE NEWS | Updated at 15:31:39 · 08/06/2026



Johnathan Hanh Nguyen-linked company plans record cash dividend of over 46% — Southern Airports Services JSC (SASCO, UPCoM: SAS), chaired by Mr. Johnathan Hanh Nguyen, plans to pay a record cash dividend...

CORPORATE NEWS | Updated at 15:31:39 · 08/06/2026



EVENTS CALENDAR

Upcoming corporate and macro events

07/2026

07

STD

Cash dividend of VND500/share

Dividend

06/2026

24

SBT

Cash dividend of VND4,536/share

Dividend

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



MID-SESSION UPDATE

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

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[Research Center](#)

VN-INDEX

1,790.53

-2.63%

CHANGE

-48.37 pts

TURNOVER

VND15,919.5bn |
+VND3,667.6bn (+29.93%)

Advancers
66

Unchanged
52

Decliners
250

VN30

1,936.81

-2.49%

CHANGE

-49.47 pts

TURNOVER

VND9,358.8bn |
+VND1,257.9bn (+15.53%)

Advancers
2

Unchanged
1

Decliners
27

HNX-INDEX

298.36

+1.56%

CHANGE

+4.57 pts

TURNOVER

VND966.3bn |
+VND245.2bn (+34%)

Advancers

Unchanged

Decliners

MARKET RECAP

The VN-Index fell by more than 48 points amid weakness across global equity markets and closed near the session low. Market breadth deteriorated sharply, with 250 decliners on the HOSE. The VN30 was the main drag, with 27 of 30 constituents closing in negative territory, amid broad-based weakness in cyclical sectors including Steel, Seafood, Securities, and Industrial Parks. Foreign investors also exerted pressure through net selling of VND651bn, concentrated in large-cap names such as FPT, VHM, and MSN. Cautious sentiment prevailed despite a meaningful improvement in turnover from the previous session. The index closing in the lower half of its intraday range indicates that buying demand was insufficient to reverse the trend, with supply continuing to outweigh demand in the near term.

OUR VIEW

From a technical perspective, the VN-Index is showing clear signs of weakness after closing at 1,791, confirming a short-term downtrend as the index fell below MA10 and MA20, while RSI (34) and MFI (24) both remained negative. With selling pressure dominant and the index finishing near the session low, a continued retest of nearby support is our base case for the coming sessions, particularly if buying demand fails to improve quickly. Against this backdrop, short-term investors should prioritize risk management by reducing exposure into technical rebounds, avoiding leverage, and considering new positions only after a clear bottoming signal emerges alongside recovering liquidity. Focus should remain on stocks with idiosyncratic catalysts such as State divestments, market upgrade prospects, economic development resolutions, or the offshore cycle. Medium- to long-term investors may use pullbacks toward medium-term support to gradually accumulate fundamentally sound stocks, while avoiding highly volatile and illiquid sectors to preserve portfolio resilience.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOWS OVER SIX SESSIONS

Today -626

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

Six-session cumulative net selling **-7.818**

Largest daily move **-5.743**

Reversal session **T-1**

T-5

T-4

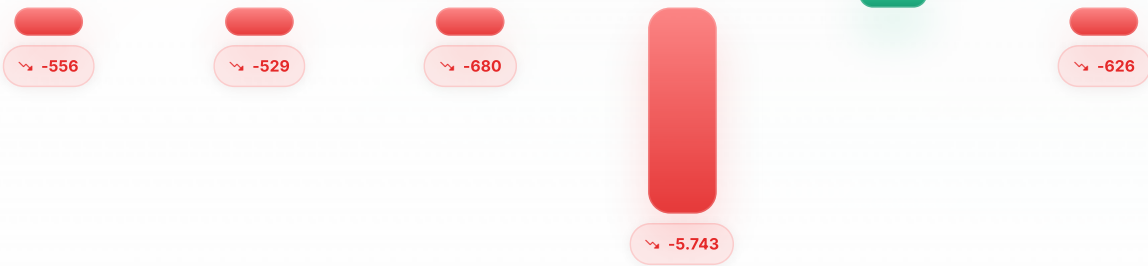
T-3

T-2

T-1

Today

+316



Source: Algo, ASEANSC

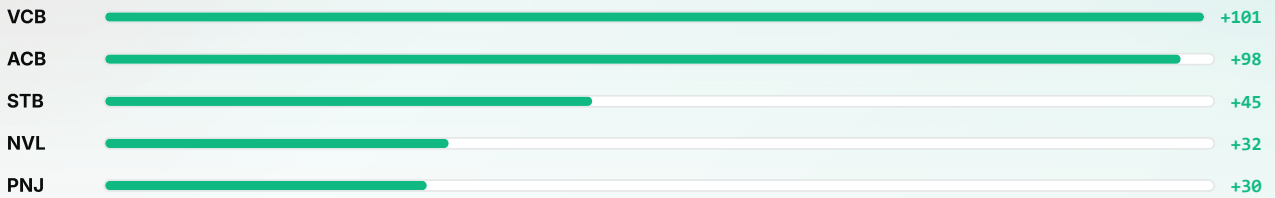
Key takeaway: Foreign investors recorded cumulative net selling of VND7,818bn over six sessions, with net selling in five of the six sessions.

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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[Research Center](#)

MARKET SNAPSHOT

<p>VN-INDEX ↘</p> <p>1,790.53 -2.63%</p> <p>CHANGE -48.37 pts</p> <p>TURNOVER VND15,919.5bn +VND3,667.6bn (+29.93%)</p>	<p>VN30 ↘</p> <p>1,936.81 -2.49%</p> <p>CHANGE -49.47 pts</p> <p>TURNOVER VND9,358.8bn +VND1,257.9bn (+15.53%)</p>	<p>HNX-INDEX ↗</p> <p>298.36 +1.56%</p> <p>CHANGE +4.57 pts</p> <p>TURNOVER VND966.3bn +VND245.2bn (+34%)</p>
<p>Advancers Unchanged Decliners</p>		

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Unchanged
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Decliners
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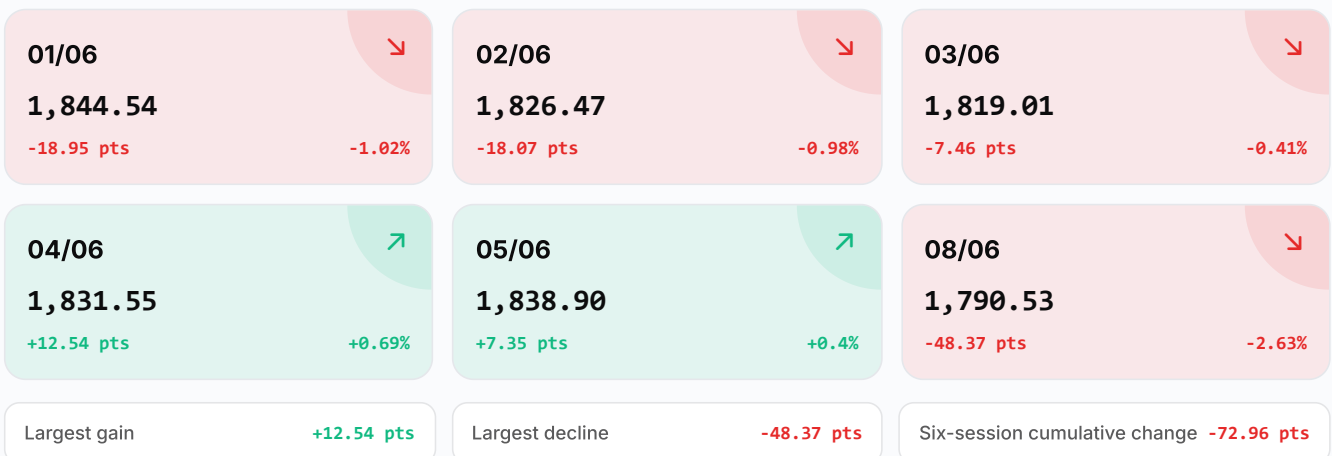
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VN-INDEX PERFORMANCE OVER THE LAST SIX SESSIONS

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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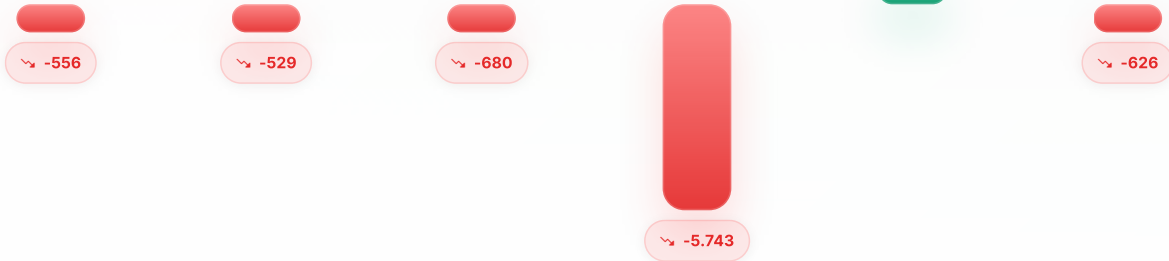
T-4

T-3

T-2

T-1

Today



Source: Algo, ASEANSC

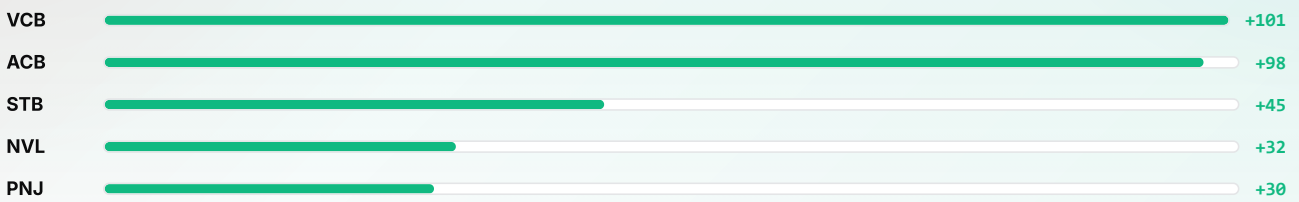
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FLOW LEADERS

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

TOP 5 NET BUYS



TOP 5 NET SELLS



MONEY FLOW · HEATMAP

DOMESTIC-FOREIGN



FLOW HEATMAP

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

TIME FRAME

02/06/2026 – 08/06/2026 (1 week)

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Foreign Flow Heatmap

📅 1 WEEK

Index Heavyweight Support	+116.46
New Oil Discoveries	-18.64
Exports	-58.23
US-Iran	-78.58
Power	-81.81
Block B-O Mon Gas-to-Power Chain	-86.06
FDI & Industrial Parks	-135.54
Earnings Season	-218.64
Public Investment	-227.8
Resolution 79	-286.33
State Divestments	-288.13
Real Estate	-369.37
Consumer & Retail	-378.39
Resolution 68	-523.81
IPO Wave	-561.35
FTSE Upgrade	-1,269.26
Banking	-1,422.76

Domestic Flow Heatmap

📅 1 WEEK

New Oil Discoveries	+172.82
US-Iran	+47.12
Exports	+15.62
Power	-21.11
Banking	-166.84
FDI & Industrial Parks	-303.49
Block B-O Mon Gas-to-Power Chain	-328.46

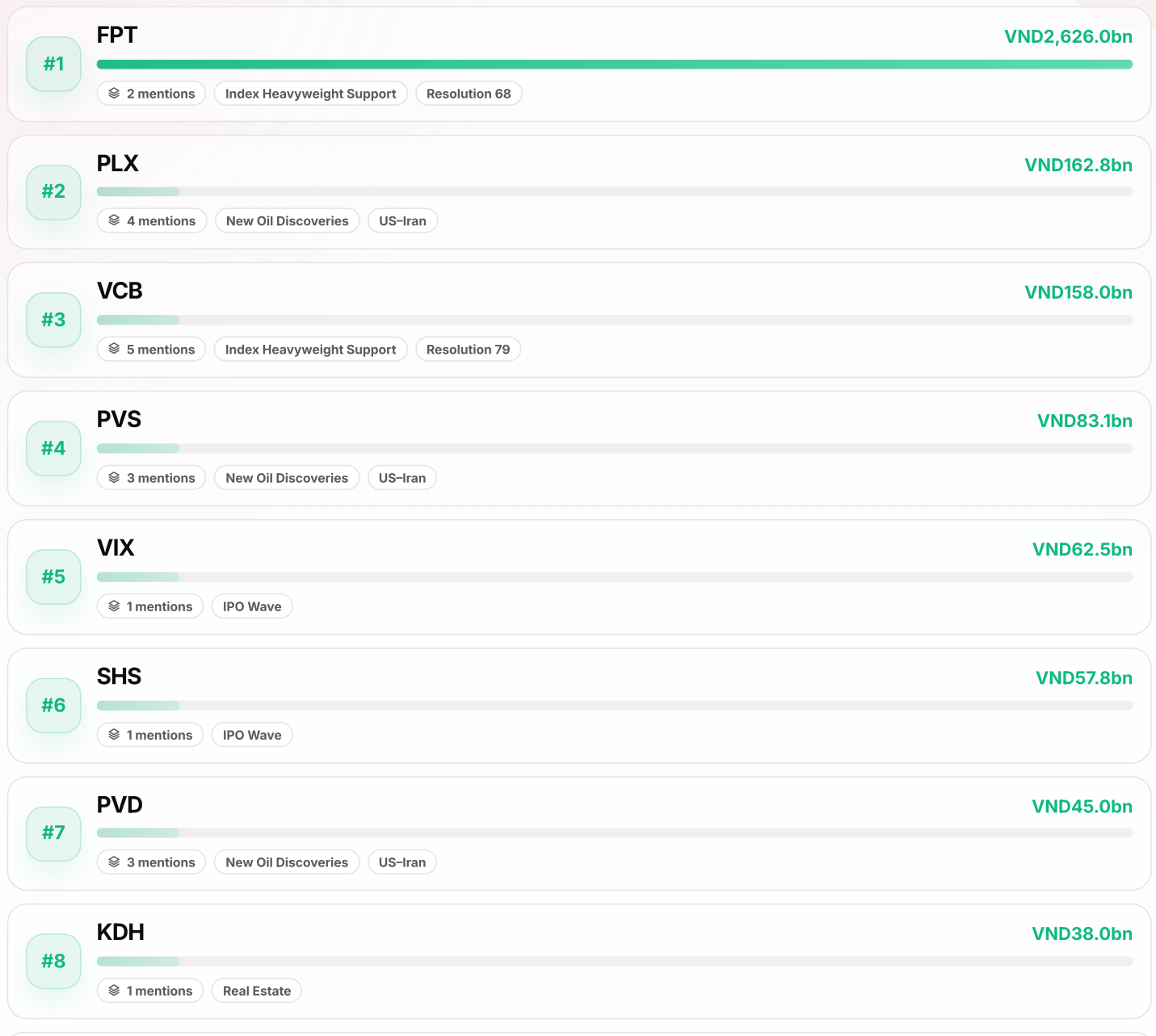


Strongly Negative Strongly Positive

Top Foreign Inflows

TICKER RANKING

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



PNJ

VND30.2bn

#9

2 mentions

Consumer & Retail

Resolution 68

BVH

VND26.0bn

#10

4 mentions

Index Heavyweight Support

Resolution 79

Top Domestic Inflows

TICKER RANKING

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

ACB

VND4,938.0bn

#1

2 mentions

Banking

Resolution 68

VJC

VND885.6bn

#2

2 mentions

Resolution 68

FTSE Upgrade

PLX

VND856.8bn

#3

4 mentions

New Oil Discoveries

US-Iran

HCM

VND575.4bn

#4

2 mentions

IPO wave

FTSE Upgrade

BSR

VND527.6bn

#5

4 mentions

New Oil Discoveries

US-Iran

HDB

VND447.0bn

#6

2 mentions

Banking

Resolution 68

VCK

VND330.3bn

#7

1 mentions

IPO Wave

BVH

VND230.4bn

#8

4 mentions

Resolution 79

State Divestments

KDH

VND178.1bn

#9

1 mentions

Real Estate

PC1

VND140.2bn

#10

1 mentions

Power

DISCLAIMER

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