

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	50,872.11	+86.1 (0.17%)
S&P 500 derived	7,386.65	-19.08 (-0.26%)
Nasdaq	25,678.82	-250.84 (-0.97%)
Small Cap 2000 derived	2,867.02	+11.6 (0.41%)
S&P 500 VIX derived	20.11	+0.24 (1.21%)
S&P/TSX	34,411.69	-67.05 (-0.19%)

Source: Investing.com, Vietstock, ASEANSC

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GLOBAL NEWS



Middle East conflict creates unexpected opportunities for Vietjet, AirAsia and Southeast Asian carriers — Amid surging jet-fuel prices and repeated disruption at major Middle Eastern aviation hubs due to the conflict...

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026



Flying more, earning less: The paradox facing global airlines in 2026 — Global airline revenue in 2026 is estimated to reach a record USD1.165tn; however, industry-wide net profit is projected at only USD23bn, nearly halving from...

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026



Anthropic releases an AI model as powerful as Mythos to the public — Two months after introducing Mythos to a limited group of customers due to security concerns, Anthropic said it was ready to release an AI model...

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026



China's exports surge nearly 20%, far exceeding forecasts — China's exports rose sharply in May, driven by demand for artificial-intelligence-related products, indicating that the world's second-largest economy...

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026



Could global gold prices fall another 20%? — Gold prices have declined sharply since reaching an all-time high of USD5,594.82/oz on January 29. On June 9, gold plunged below USD4,300/oz and...

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026



Major banks channel nearly USD900bn into fossil fuels in 2025 — The latest report shows that financing from leading global banks for fossil fuels increased 8% in 2025, despite...

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026



WTI crude plunges more than 3% — Oil prices fell sharply on June 9 after U.S. Energy Secretary Chris Wright said shipping traffic through the Strait of Hormuz was "increasing..."

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026



Chip stocks reverse lower, pushing the S&P 500 and Nasdaq into the red — U.S. equities were mixed on June 9 as the semiconductor rebound quickly lost momentum, despite a sharp decline in oil prices amid expectations...

GLOBAL NEWS | Updated at 15:28:37 · 10/06/2026

VIETNAM NEWS

 Trade Now



Deputy PM: Today's generation of young entrepreneurs carries a new mission

MACRO | 6 minutes ago



Standard Chartered Vietnam CEO: To weather global volatility, businesses need to unlock liquidity

ECONOMY & INVESTMENT | 14 minutes ago



More North-South expressways to introduce tolls; Can Tho-Ca Mau section from September 15

ECONOMY & INVESTMENT | 23 minutes ago



Contract dispute emerges in a Nhon-Hanoi Station metro package

ECONOMY & INVESTMENT | 1 hour ago



VIFC-HCMC: The financial-center race is not driven by incentives alone

NEWS | Today



Electricity Authority sets conditions for selling 100% of surplus rooftop solar power to the grid

NEWS | Today



DGC seeks to sell ethanol plant after investing hundreds of billions of VND — On June 9, the BOD of Duc Giang Chemicals Group JSC (HOSE: DGC) approved in principle the transfer of the Duc Giang Ethanol Plant, despite having invested...

CORPORATE NEWS | Updated at 15:28:37 · 10/06/2026



Viglacera considers investing over VND660bn to restructure its glass segment — Viglacera plans to inject more than VND660bn into Vietnam Float Glass Co., Ltd. to acquire VGC's entire equity stake in...

CORPORATE NEWS | Updated at 15:28:37 · 10/06/2026



Planning tens of billions of VND in three projects on prime land, how did DATC perform in 2025? — Vietnam Debt and Asset Trading Corporation (DATC) plans 2026 operations with total revenue of VND3,260bn, up 32%. In addition, DATC...

CORPORATE NEWS | Updated at 15:28:37 · 10/06/2026



Government issues new decree on bond issuance and corporate responsibilities — The Government issued Decree 200/2026/ND-CP dated June 5, 2026, governing private placements and trading of corporate bonds in the domestic market...

CORPORATE NEWS | Updated at 15:28:37 · 10/06/2026



IPA fined for bond-related disclosure violations — On June 5, I.P.A Investments Group JSC (HNX: IPA) received a decision from the State Securities Commission imposing an administrative penalty in the securities sector...

CORPORATE NEWS | Updated at 15:28:37 · 10/06/2026



Phat Dat expects at least VND3,000bn from the transfer of the Thuan An 2 project developer — After approving the proposed transfer of Serenity Phuoc Hai shares, Phat Dat further announced a plan to transfer its entire stake in the high-rise...

CORPORATE NEWS | Updated at 15:28:37 · 10/06/2026



EVENTS CALENDAR

Upcoming corporate and macro events

07/2026

17

CH5

Cash dividend of VND1,100/share

Dividend

07/2026

28

BSD

Cash dividend of VND700/share

Dividend

07/2026

22

HLC

Cash dividend of VND1,000/share

Dividend

07/2026

22

PTP

Cash dividend of VND76/share

Dividend

07/2026

20

NVP

Cash dividend of VND350/share

Dividend

07/2026

02

SEP

Cash dividend of VND510/share

Dividend



MID-SESSION UPDATE

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

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[Research Center](#)

VN-INDEX

1,803.71

+0.59%

CHANGE

+10.66 pts

TURNOVER

VND10,834.3bn | - VND505.1bn (-4.45%)

Advancers
207

Unchanged
50

Decliners
105

VN30

1,960.97

+0.46%

CHANGE

+9.05 pts

TURNOVER

VND5,684.5bn | - VND1,303.7bn (-18.66%)

Advancers
22

Unchanged
3

Decliners
5

HNX-INDEX

301.15

-1.5%

CHANGE

-4.59 pts

TURNOVER

VND751.9bn | +VND132.8bn (+21.46%)

Advancers

Unchanged

Decliners

MARKET RECAP

VN-Index remained in positive territory throughout the afternoon and closed nearly 11 points higher at the intraday high, underscoring buyers' dominance. Market sentiment improved markedly, with 207 advancers on HOSE; the VN30 basket led the market as 22 of its 30 constituents gained, with notable strength in Real Estate, Construction, Power and Steel. However, the breakout remained constrained by several headwinds, as foreign investors net sold VND574bn, concentrated in large-cap stocks including MBB, VPB and SSI, while divergence across several individual sectors also partly tempered the market's overall advance.

OUR VIEW

VN-Index is sending mixed signals, as today's recovery attempt was insufficient to reverse the prevailing downtrend, reflected by the index closing below MA10 and MA20 while the RSI and MFI momentum indicators remained weak. Although proactive demand helped the index finish near the session high, laying the groundwork for a retest of nearby resistance zones, subdued liquidity and latent correction pressure suggest range-bound trading is likely to dominate early in the next session. Against this backdrop, short-term investors should maintain a moderate equity exposure, avoid chasing rebounds, and trade around support at 1,800–1,810 and resistance at 1,820–1,830, while prioritizing stocks with idiosyncratic catalysts such as State divestments, economic-development resolutions and the offshore cycle. Meanwhile, medium- and long-term investors may use pullbacks toward medium-term support to accumulate fundamentally sound, liquid stocks in Banking, Securities, Retail, Public Investment and Oil & Gas in tranches.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOWS OVER SIX SESSIONS

Today -574

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

Cumulative six-session net selling -8.200

Largest daily move -5.743

Reversal session T-3

T-5

T-4

T-3

T-2

T-1

Today

+316

-680

-665

-854

-574

-5.743

Source: Algo, ASEANSC

Key takeaway: Foreign investors recorded cumulative net selling of VND8,200bn over six sessions, with net selling in five of the six sessions.

FLOW LEADERS

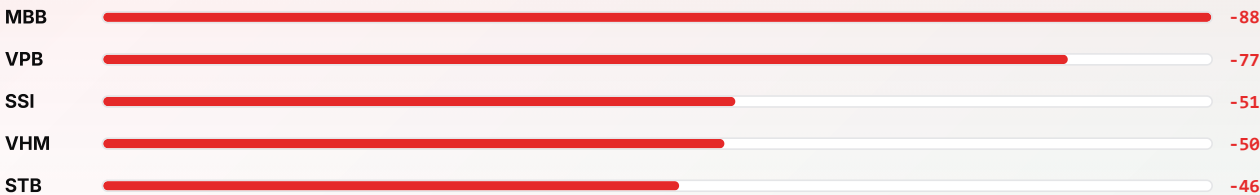
TOP FOREIGN TRADES

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

VN-INDEX

1,803.71

+0.59%

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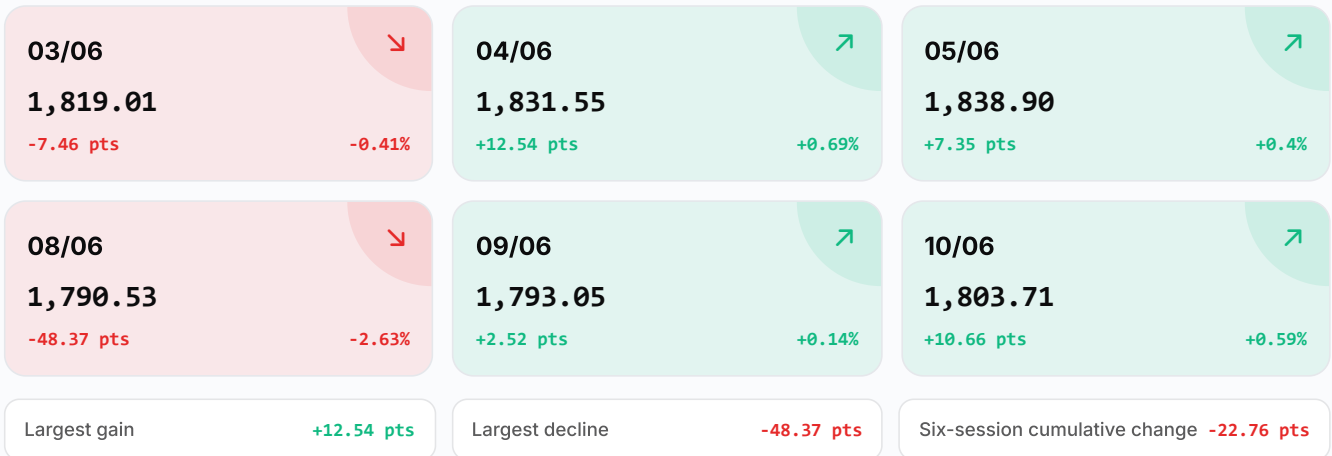
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VN-INDEX PERFORMANCE OVER THE LAST SIX SESSIONS

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

● ADVANCERS ● DECLINERS ● FLAT



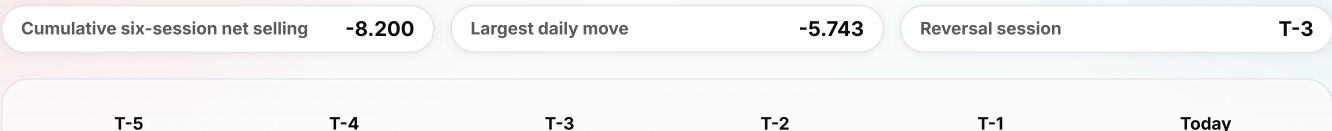
FOREIGN FLOW SPOTLIGHT

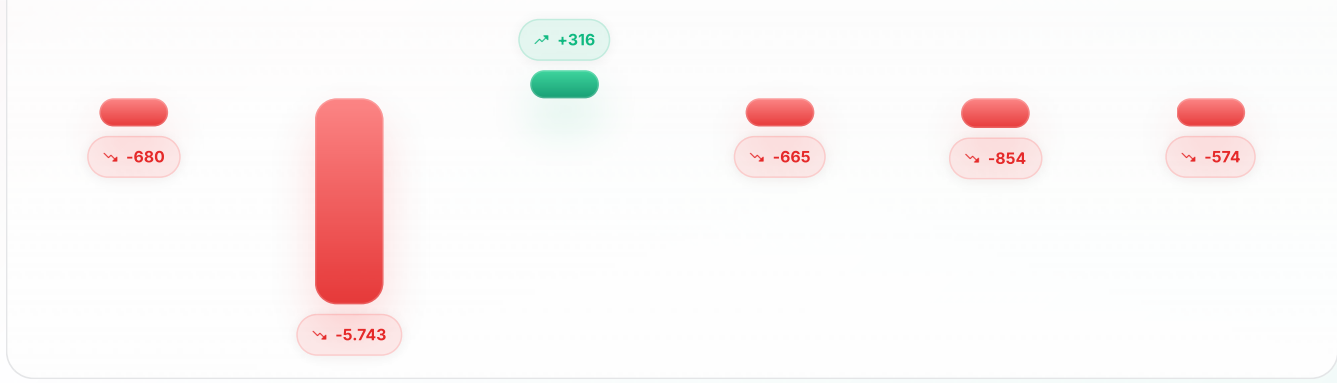
Net-buying sessions 1/6

FOREIGN NET FLOWS OVER SIX SESSIONS

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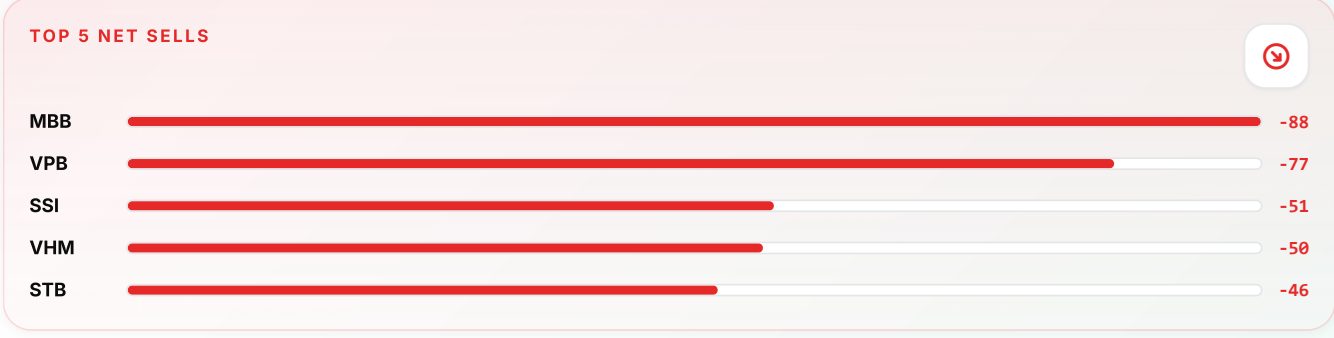
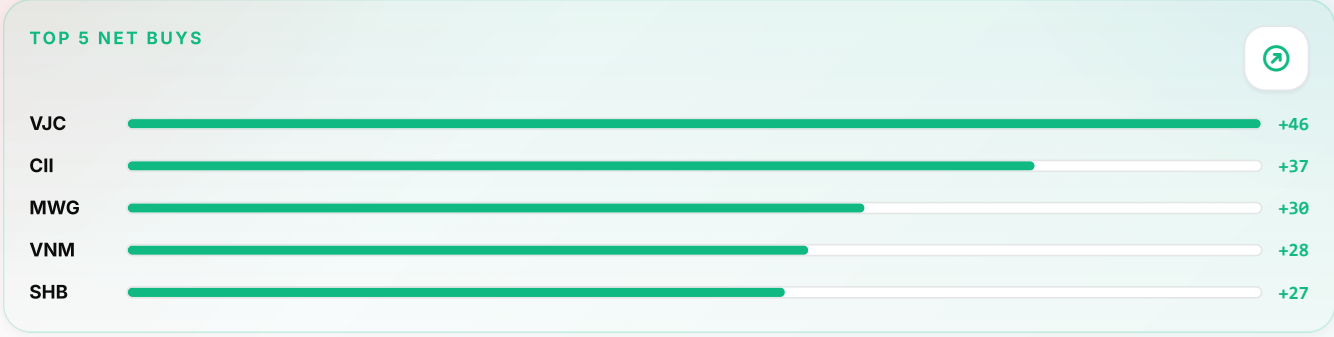
Source: Algo, ASEANSC

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FLOW LEADERS

TOP FOREIGN TRADES

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



MONEY FLOW · HEATMAP

DOMESTIC-FOREIGN FLOW HEATMAP



Tracks domestic and foreign flow priorities across key investment themes over a

TIME FRAME
04/06/2026 – 10/06/2026 (1 week)

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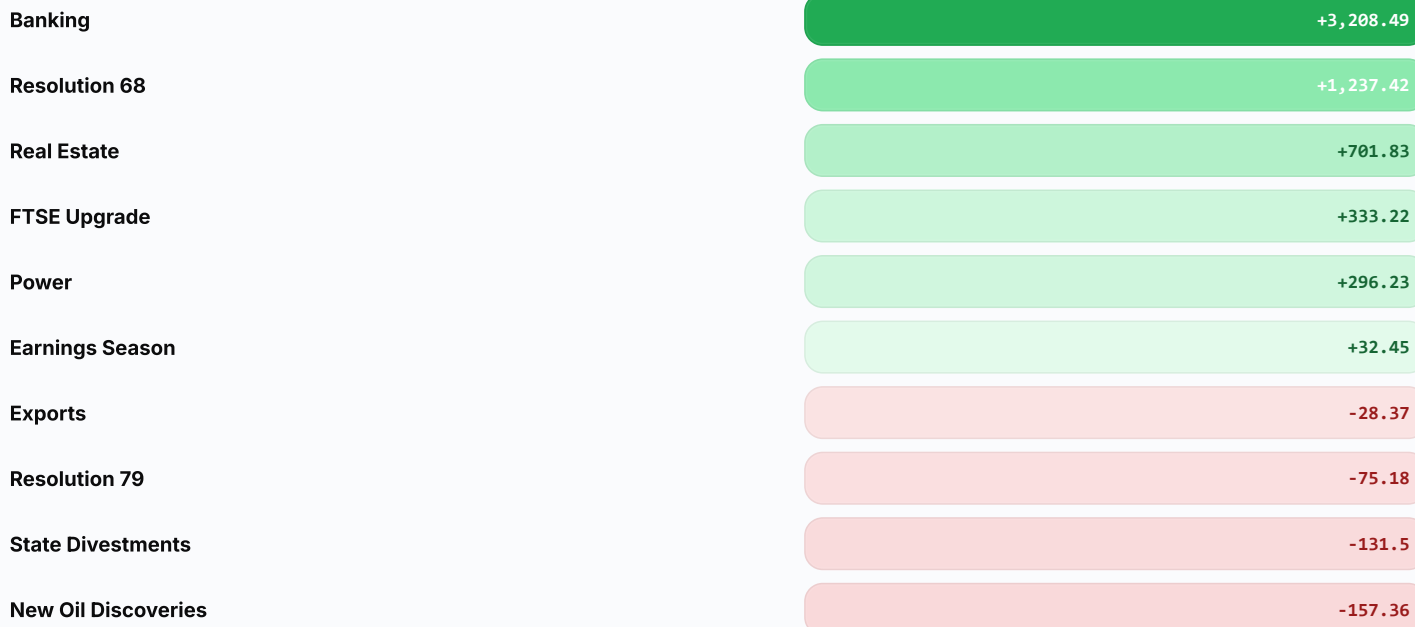
Foreign Flow Heatmap

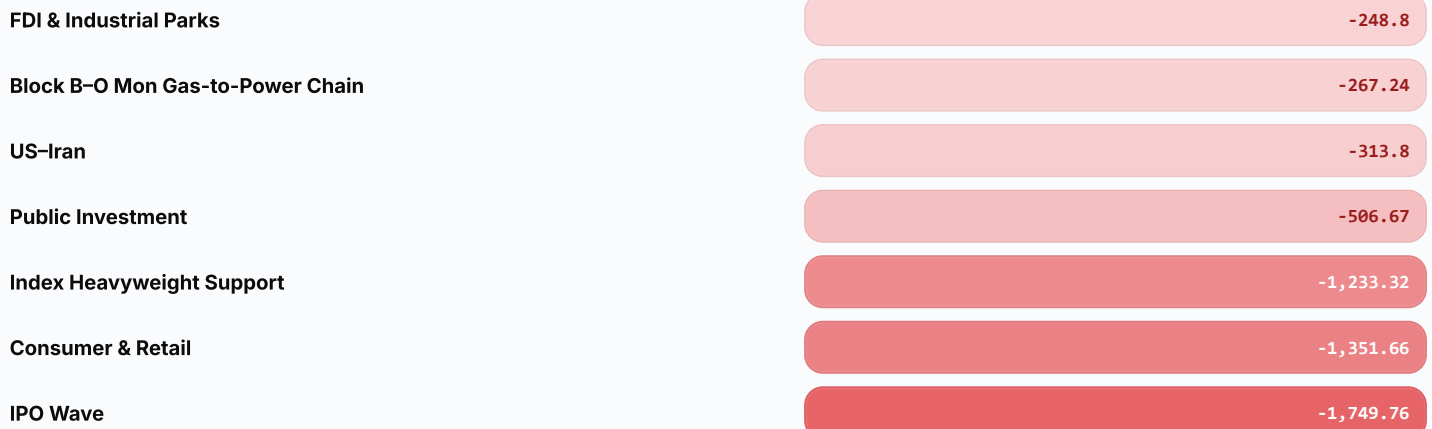
🕒 1 WEEK



Domestic Flow Heatmap

🕒 1 WEEK



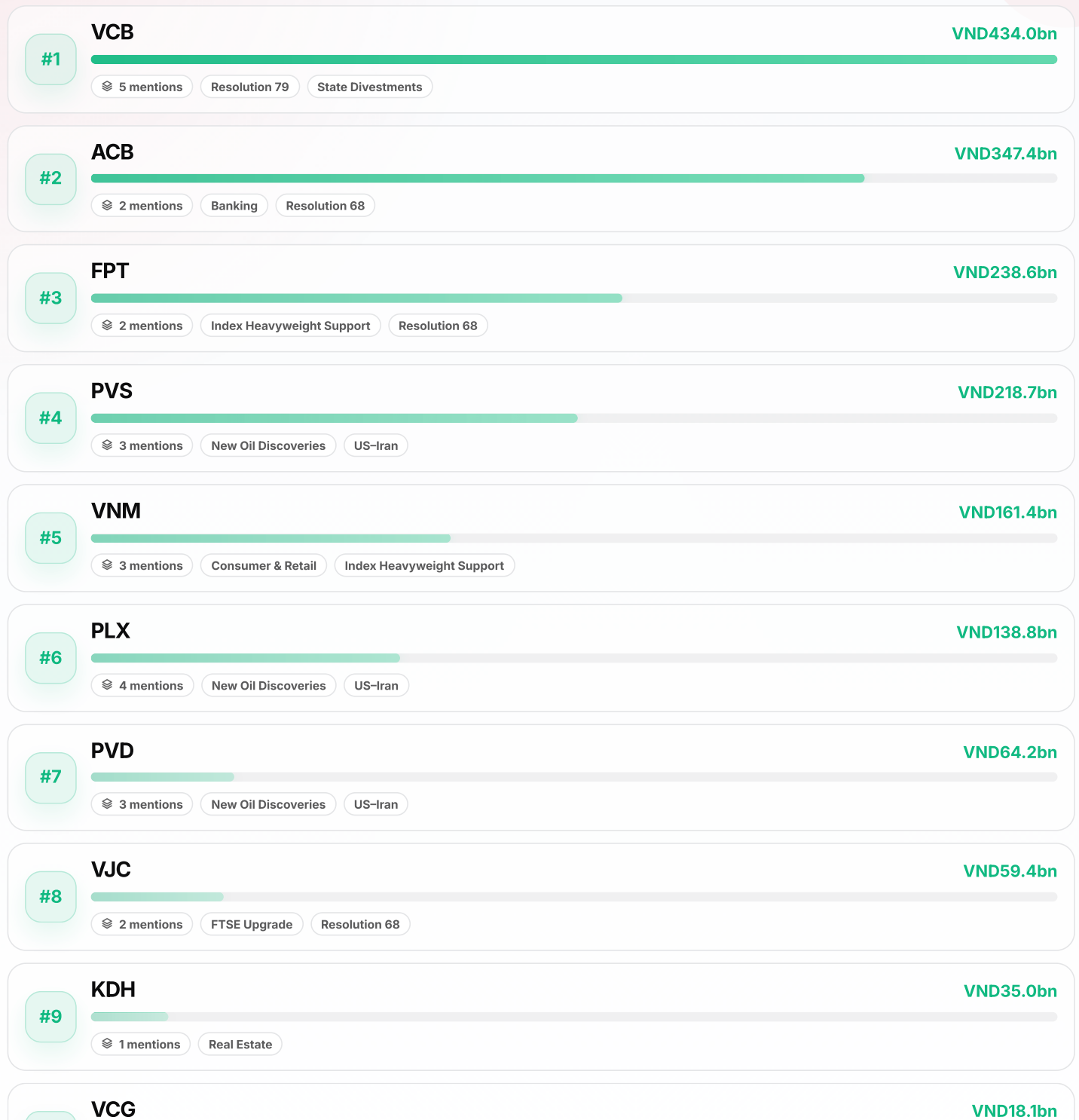


Strongly Negative Strongly Positive

Top Foreign Inflows

TICKER RANKING

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



#10

1 mentions

Public Investment

Top Domestic Inflows

TICKER RANKING

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

#1

VHM

VND2,561.6bn

4 mentions

Resolution 68

Real Estate

#2

ACB

VND1,859.6bn

2 mentions

Banking

Resolution 68

#3

VJC

VND1,347.4bn

2 mentions

Resolution 68

FTSE Upgrade

#4

HCM

VND974.4bn

2 mentions

FTSE Upgrade

IPO Wave

#5

STB

VND891.3bn

1 mentions

Banking

#6

VPB

VND489.0bn

1 mentions

Banking

#7

TCB

VND413.6bn

1 mentions

Index Heavyweight Support

#8

BID

VND355.5bn

3 mentions

Resolution 79

State Divestments

#9

POW

VND326.8bn

4 mentions

Power

Resolution 79

#10

PLX

VND320.0bn

4 mentions

Resolution 79

State Divestments

DISCLAIMER

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