

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	49,918.78	-953.33 (-1.87%)
S&P 500 derived	7,266.99	-119.66 (-1.62%)
Nasdaq	25,169.50	-509.32 (-1.98%)
Small Cap 2000 derived	2,835.46	-31.56 (-1.1%)
S&P 500 VIX derived	20.59	-1.63 (-7.34%)
S&P/TSX	34,151.32	-260.37 (-0.76%)

Source: Investing.com, Vietstock, ASEANSC

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## GLOBAL NEWS



**Trump signals he may not renew the trade agreement with Canada and Mexico** — US President Donald Trump said he may not renew the United States-Mexico-Canada Agreement (USMCA), which he championed in 2020...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026



**White House seeks to limit refunds of tariffs imposed under IEEPA** — Although the Supreme Court struck down tariffs imposed under the IEEPA, the US government is not automatically required to refund all collections...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026



**US CPI posts its strongest increase in three years; Trump says, "I like inflation"** — On June 10, US President Donald Trump drew attention by saying "I like inflation" after newly released data showed US inflation had accelerated...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026



**Oil and gas trading firms reap windfall as Strait of Hormuz is blocked** — Amid disruptions to global energy supply and sharp oil-price volatility, oil and gas traders have emerged among the main beneficiaries...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026



**European aviation bets on hybrid-electric aircraft amid energy crisis** — Electrification and hybrid-electric aircraft are viewed as promising solutions to reduce aviation fuel consumption while helping operators...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026



**Iran closes the Strait of Hormuz** — Iran announced the closure of the Strait of Hormuz to all vessels, including oil tankers and commercial ships, after the US expanded its attacks on...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026



**Global gold plunges more than 4% below USD4,100** — Global gold prices fell sharply on June 10 as military tensions between the US and Iran escalated, raising concerns over persistent inflation and the possibility that the Fed...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026



**Oil rises more than 2% after Trump vows to strike Iran "very hard"** — Global oil prices rose sharply on June 10 after US President Donald Trump issued tough statements against Iran, fuelling concerns...

GLOBAL NEWS | Updated at 15:32:14 · 11/06/2026

## VIETNAM NEWS

 Trade Now



**Investment policy revised for the Cat Lai and Long Hung bridge projects under the PPP model**

ECONOMY & INVESTMENT | 13 minutes ago



**Nikkei Chairman seeks to support Vietnam's socio-economic development**

ECONOMY & INVESTMENT | 42 minutes ago



**JICA President proposes four pillars for future ODA cooperation with Vietnam**

ECONOMY & INVESTMENT | 52 minutes ago



**Hanoi proposes a bond-issuance mechanism to mobilise development funding**

MACRO | 3 hours ago



**EVN executive: Revised peak-hour schedule will not affect household electricity bills**

NEWS | Today



**General Secretary and President To Lam: Air and water pollution and landslides must be prioritised**

NEWS | Today

## CORPORATE NEWS

 Trade Now



**Miliket noodle owner sets record date for stock dividend; targets 2026 profit above VND23bn** — Colusa-Miliket Food JSC (CMN) plans to issue 9.6 million shares as a stock dividend. This year, the company targets profit of...

**CORPORATE NEWS** | Updated at 15:32:14 · 11/06/2026



**F88's 2025 ESG report: The alternative-lending leader's case** — Alternative lending often faces scrutiny over interest rates, debt-collection practices and operational transparency. Against this backdrop...

**CORPORATE NEWS** | Updated at 15:32:14 · 11/06/2026



**LPBS IPO share allocation reaches 100%** — LPBank Securities JSC (LPBS) announced a 100% allocation rate for its initial public offering after the subscription period ended...

**CORPORATE NEWS** | Updated at 15:32:14 · 11/06/2026



**OGC relinquishes control as OCH commits over VND1tn to IDS** — While OGC shareholders rejected a VND720bn fundraising plan to participate in OCH's capital increase, the company approved a share issuance plan...

**CORPORATE NEWS** | Updated at 15:32:14 · 11/06/2026



**Thac Mo Hydropower to distribute hundreds of billions of dong in dividends to EVNGENCO2 and REE Energy** — Thac Mo Hydropower JSC (HOSE: TMP) announced a Board resolution to pay the remaining 2025 cash dividend at 20%, equivalent to VND2,000...

**CORPORATE NEWS** | Updated at 15:32:14 · 11/06/2026



**PDR seeks shareholder approval for VND10.4tn acquisition of a stake in Lotte Properties HCMC** — Phat Dat Real Estate Development Corp (HOSE: PDR) announced plans to seek written shareholder approval for several matters within shareholder authority...

**CORPORATE NEWS** | Updated at 15:32:14 · 11/06/2026



## EVENTS CALENDAR

Upcoming corporate and macro events

07/2026

**23**

**CQN**

Cash dividend of VND1,000/share

Dividend

06/2026

**25**

**ABR**

Cash dividend of VND650/share

Dividend

06/2026

**25**

**ABR**

Cash dividend of VND350/share

Dividend

07/2026

**01**

**M10**

Cash dividend of VND1,500/share

Dividend

07/2026

**21**

**TVH**

Cash dividend of VND3,900/share

Dividend

07/2026

**17**

**CH5**

Cash dividend of VND1,100/share

Dividend

12:00 PM · MID-SESSION



## MID-SESSION UPDATE

**VN-INDEX** ↘

**1,798.61** -0.28%

CHANGE -5.1 pts

TURNOVER 9,305.1 bn | -1,565.5 bn (-14.4%)

---

Advancers  
118
Unchanged  
68
Decliners  
178

**VN30** ↘

**1,947.28** -0.7%

CHANGE -13.69 pts

TURNOVER 5,213.7 bn | -458.8 bn (-8.09%)

---

Advancers  
8
Unchanged  
3
Decliners  
19

**HNX-INDEX** ↘

**300.09** -0.35%

CHANGE -1.06 pts

TURNOVER 781.0 bn | +28.0 bn (+3.71%)

---

Advancers
Unchanged
Decliners

↗ **MARKET RECAP**

VN-Index closed down more than 5 points, although the second half of the session showed a notable recovery as bottom-fishing demand emerged during pullbacks, helping the index finish above its intraday average. Nevertheless, cautious sentiment led to a sharp contraction in liquidity, while market breadth tilted decisively negative with 178 decliners on HOSE. Foreign investors recorded net selling of VND508bn, concentrated in large caps such as NVL, VHM and TCB. Pressure from the VN30 basket and weakness in rate-sensitive sectors including Real Estate, Securities and Aviation outweighed support from Industrial Park Real Estate, preventing a successful reversal despite a relatively resilient close.

🌐 **OUR VIEW**

VN-Index remains in a prevailing downtrend, closing below the MA10 and MA20, while weakening momentum indicators—RSI at 37 and MFI at 25—suggest that corrective pressure remains dominant and a retest of nearby support zones is still possible. Although the lower-shadow bullish candle indicates that bottom-fishing demand has started to provide support, the recovery signal remains unconvincing without improved liquidity and a sustained price base. Under the base-case scenario, the index may trade sideways within a narrow range early in the next session before establishing a clearer direction later in the day. Short-term investors should therefore maintain a moderate equity exposure, avoid chasing rebounds and trade within the 1,790–1,820 range, while prioritising stocks with idiosyncratic catalysts such as SOE divestment, growth-oriented policy resolutions, the market-upgrade roadmap or the offshore oil & gas cycle. Medium- and long-term investors may continue to accumulate selectively near medium-term support, focusing on fundamentally sound and liquid names in Banking, Securities, Retail, Public Investment and Oil & Gas.

📧 **FOREIGN FLOW SPOTLIGHT**

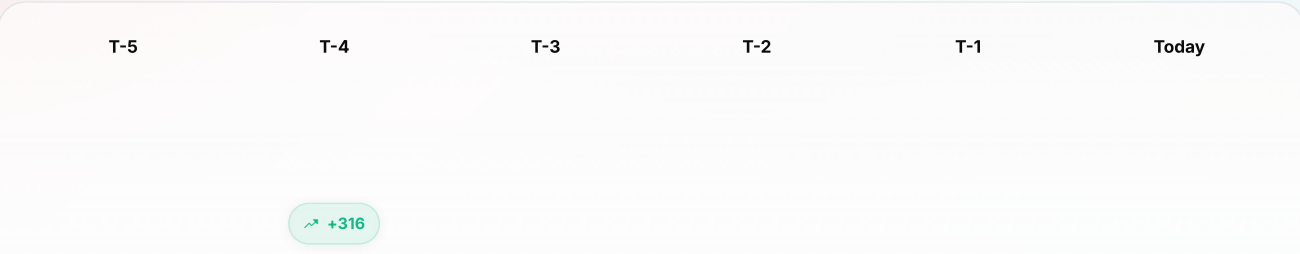
↑ Net-buying sessions 1/6

📊 **FOREIGN NET FLOWS OVER SIX SESSIONS**

↓ Today -508

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

6-session cumulative net selling **-8.025**    Largest daily move **-5.743**    Reversal session **T-4**





-5,743



-665



-854



-571



-508

Source: Algo, ASEANSC

Key highlight: Foreign investors recorded cumulative net selling of VND8,025bn 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



VNM	<div style="width: 95%;"></div>	+29
KBC	<div style="width: 45%;"></div>	+13
GVR	<div style="width: 45%;"></div>	+13
SAB	<div style="width: 35%;"></div>	+10
VCK	<div style="width: 30%;"></div>	+9

### TOP 5 NET SELLS



NVL	<div style="width: 95%;"></div>	-53
VHM	<div style="width: 85%;"></div>	-48
VIC	<div style="width: 75%;"></div>	-41
TCB	<div style="width: 65%;"></div>	-34
VPB	<div style="width: 60%;"></div>	-33

15:30 PM · MARKET CLOSE



# MARKET CLOSE

Session recap, market outlook, and key data highlights.

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## MARKET SNAPSHOT

**VN-INDEX** ↘

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## ↗ MARKET RECAP

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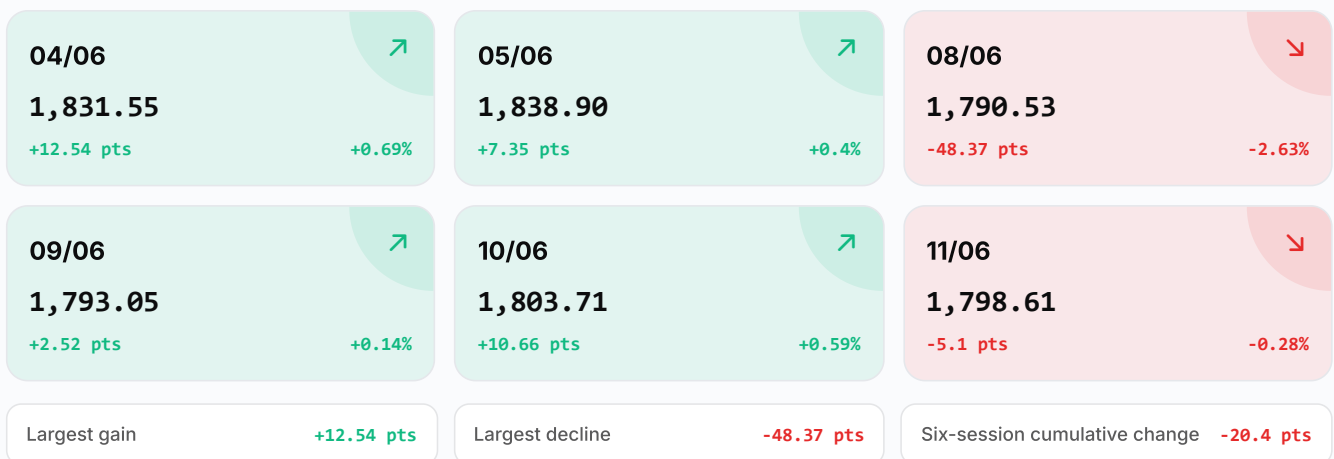
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## 📅 VN-INDEX PERFORMANCE OVER THE LAST SIX SESSIONS

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

● **ADVANCERS** ● **DECLINERS** ● FLAT



## FOREIGN NET FLOWS OVER SIX SESSIONS

Today -508

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6-session cumulative net selling -8.025 Largest daily move -5.743 Reversal session T-4



Source: Algo, ASEANSC

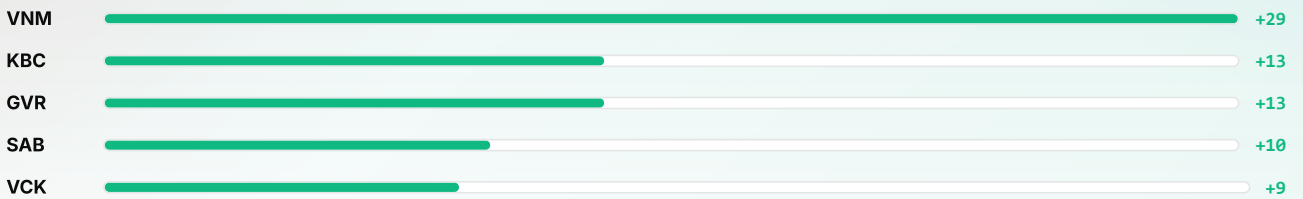
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## FLOW LEADERS

### TOP FOREIGN TRADES

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

#### TOP 5 NET BUYS



#### TOP 5 NET SELLS



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  
05/06/2026 – 11/06/2026 (1 week)

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## Foreign Flow Heatmap

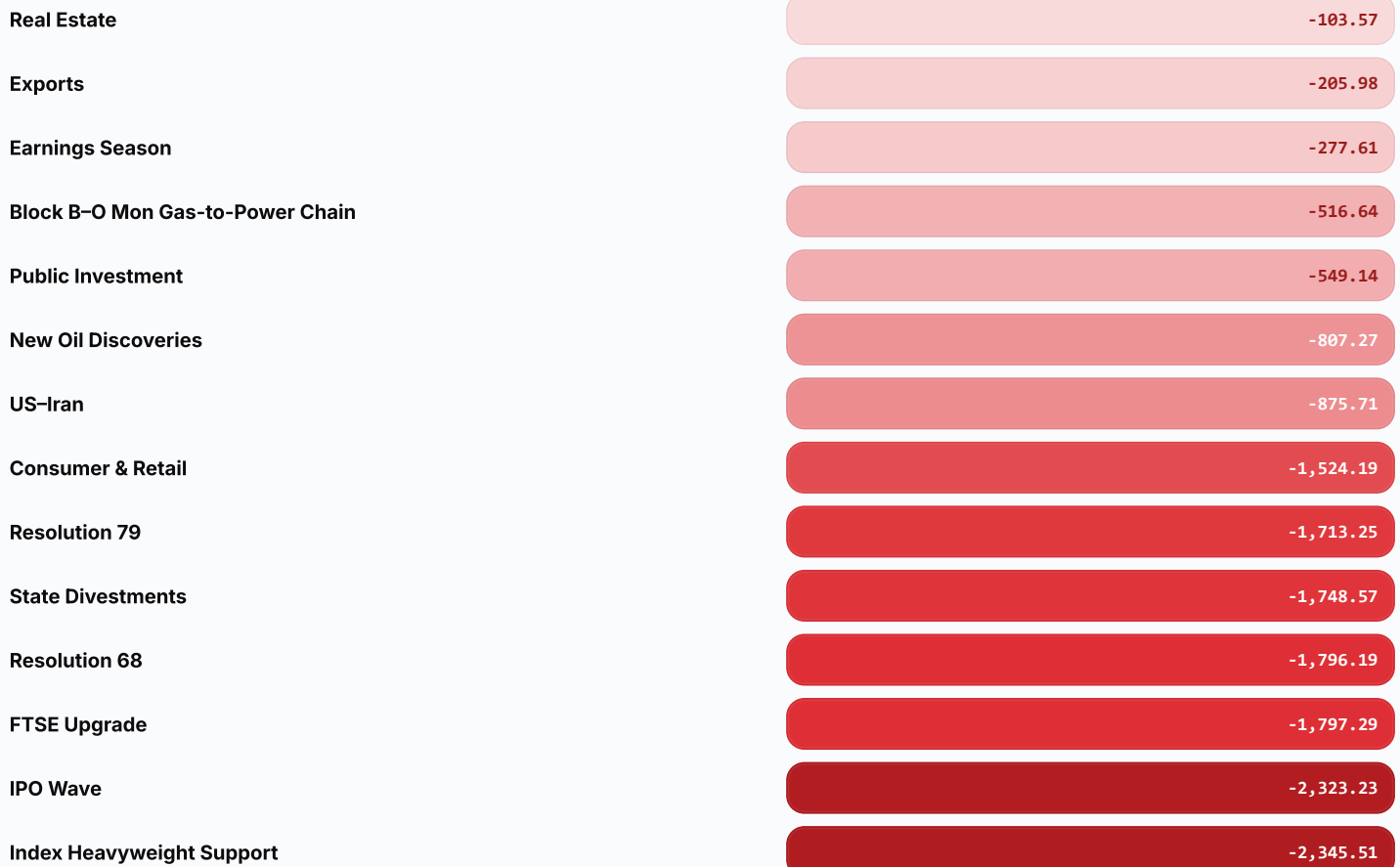
1 WEEK

New Oil Discoveries	+44.52
Block B-O Mon Gas-to-Power Chain	+19.14
US-Iran	+17.98
Power	-5.12
Exports	-23.98
FDI & Industrial Parks	-83.46
State Divestments	-85.63
Resolution 79	-86.15
Earnings Season	-105.17
Public Investment	-157.51
Consumer & Retail	-178.53
Real Estate	-269.21
IPO Wave	-381.04
Banking	-596.09
FTSE Upgrade	-787.36
Index Heavyweight Support	-908.75
Resolution 68	-1,035.09

## Domestic Flow Heatmap

1 WEEK

Power	+323.51
FDI & Industrial Parks	+93.07
Banking	+9.51

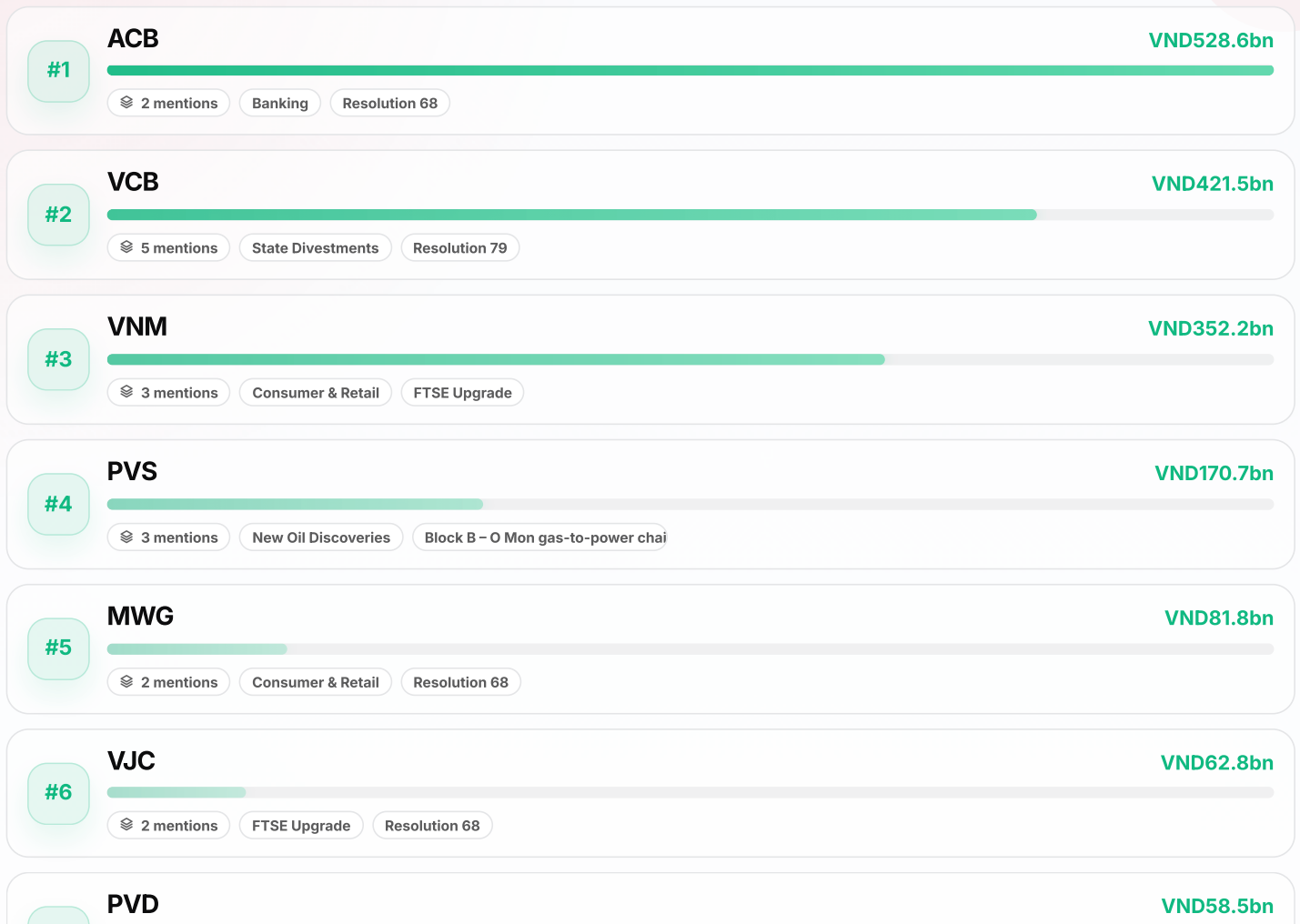


Strongly Negative Strongly Positive

## Top Foreign Inflows

TICKER RANKING

Ranks stocks by the cumulative value of appearances in TOP\_BUY clusters on the foreign sheet.



#7

3 mentions

New Oil Discoveries

Block B - O Mon gas-to-power cha

#8

KDH

VND38.1bn

1 mentions

Real Estate

#9

PLX

VND28.8bn

4 mentions

New Oil Discoveries

US-Iran

#10

GVR

VND26.4bn

3 mentions

State Divestments

Resolution 79

## Top Domestic Inflows

TICKER RANKING

Ranks stocks by the cumulative value of appearances in TOP\_BUY clusters on the domestic sheet.

#1

TCB

VND1,176.9bn

3 mentions

Banking

Resolution 68

#2

HCM

VND726.0bn

2 mentions

FTSE Upgrade

IPO Wave

#3

VJC

VND696.8bn

2 mentions

Resolution 68

FTSE Upgrade

#4

MBB

VND462.5bn

1 mentions

Banking

#5

STB

VND431.9bn

1 mentions

Banking

#6

PC1

VND378.5bn

1 mentions

Power sector

#7

VCK

VND202.0bn

1 mentions

IPO Wave

#8

HDB

VND144.8bn

1 mentions

Resolution 68

#9

KBC

VND124.3bn

1 mentions

FDI &amp; Industrial Park Real Estate

**DISCLAIMER**

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