

🕒 08:00 AM · PRE-MARKET



# MORNING BRIEF

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

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## 🌐 US EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	51,202.26	+353.51 (0.7%)
S&P 500 derived	7,431.46	+37.16 (0.5%)
Nasdaq	25,888.84	+79.18 (0.31%)
Small Cap 2000 derived	2,943.99	+22.96 (0.79%)
S&P 500 VIX derived	16.72	-0.96 (-5.43%)
S&P/TSX	34,937.85	+266.39 (0.77%)

Sources: Investing.com, Vietstock, ASEANSC Research

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## 🌐 INTERNATIONAL NEWS



### Kevin Warsh Faces His First Test at the Fed —

The new Fed Chair will be judged on his independence and policy execution, according to the Financial Times.

INTERNATIONAL NEWS

Updated at 15:35:13 · 15/06/2026



### Hormuz Strait Reopens, but Why Are the

Economic Scars Still Lingering? — The Strait of Hormuz may reopen under a US-Iran peace agreement expected to be signed on June 19. However, experts warn that...

INTERNATIONAL  
NEWS

Updated at 15:35:13 ·  
15/06/2026



**How Large Is Elon Musk's USD 1 tn Fortune? —**  
Elon Musk has become the first person in history to amass a USD 1 tn fortune after SpaceX, his rocket and artificial-intelligence company...

INTERNATIONAL  
NEWS

Updated at 15:35:13 ·  
15/06/2026



**Oil Slumps 5% as Equities and Gold Rally on US-Iran Peace Deal —** Oil prices fell sharply at the start of the week after US President Donald Trump said Washington had finalized an agreement with Iran to reopen...

INTERNATIONAL  
NEWS

Updated at 15:35:13 ·  
15/06/2026



**US and Iran Reach Peace Deal, Ending Nearly Four Months of Conflict —** The US and Iran reached an agreement to end the nearly four-month conflict, with both sides declaring an immediate and permanent halt to...

INTERNATIONAL  
NEWS

Updated at 15:35:13 ·  
15/06/2026



**South Korea's New "Semiconductor Valley" —** Plans to establish the integrated Gwangju-Jeonnam special administrative region are expected to support the development of a new semiconductor hub in southern South Korea...

INTERNATIONAL  
NEWS

Updated at 15:35:13 ·  
15/06/2026



**America's Ultra-Wealthy Build Record Cash Holdings —** Many wealthy Americans are reducing exposure to financial markets and holding record amounts of cash, reflecting a more cautious stance...

INTERNATIONAL  
NEWS

Updated at 15:35:13 ·  
15/06/2026



**India Exempts High-Ethanol Gasoline from Excise Tax —** The exemption is viewed as the first financial measure designed to encourage the use of fuels with ethanol content above the current E20 standard...

INTERNATIONAL  
NEWS

Updated at 15:35:13 ·  
15/06/2026

## DOMESTIC NEWS

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**Vietnam's Exports to the US Reach Nearly USD 70 bn in Five Months**

ECONOMY & INVESTMENT | 2 hours ago



**Special Urban Law: A Breakthrough in the Governance Model for Ho Chi Minh City**

MACRO | 4 hours ago



**When Can 100% of Surplus Rooftop Solar Output Be Sold?**

ECONOMY & INVESTMENT | 4 hours ago



**Central Steering Committee for Foreign Affairs and International Integration Established**

NEWS | Today



**Vietnam Seeks to Expand ASEAN-Russia Cooperation Across Eurasia**

NEWS | Today



**Prime Minister: Ho Chi Minh City Must Resolve the VND 10 tn Flood-Control Project This Year**

NEWS | Today

## CORPORATE NEWS

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**Nuoc Trong Hydropower to Pay VND 16.2 bn Interim Dividend —** Nuoc Trong Hydropower JSC (HNX: NTH) announced the record date for its first 2026 interim dividend. The ex-dividend date is July 28.



**Helios Plans Collateral Sale to Repay VND 3 tn of Bond Debt —** Helios Investment and Services JSC disclosed a June 11, 2026 bondholder resolution for bond code HISCH2124001 regarding the proposed disposal of collateral...

CORPORATE NEWS | Updated at 15:35:13 · 15/06/2026



**Hoa Phat Targets Nearly 15 Million Tonnes of Steel Sales in 2026** — Hoa Phat (HOSE: HPG) targets nearly 15 million tonnes of steel sales in 2026, up approximately 40% YoY and the highest level on record...

CORPORATE NEWS | Updated at 15:35:13 · 15/06/2026

CORPORATE NEWS | Updated at 15:35:13 · 15/06/2026



**UOB Vietnam Appoints Pham Hong Hai as Deputy CEO** — United Overseas Bank (Vietnam) announced the appointment of Pham Hong Hai as Deputy CEO, effective June 15.

CORPORATE NEWS | Updated at 15:35:13 · 15/06/2026



**Who Are the Five Power-Sector Chairmen Recently Prosecuted and Detained?** — Five power-sector companies—PECC 1, PECC 2, PECC 3, PECC 4 and PCC1—issued extraordinary disclosures after their chairmen and key executives were...

CORPORATE NEWS | Updated at 15:35:13 · 15/06/2026



**VIP Reminded Over Delayed Disclosure of Tax Penalty Decision** — VIPCO Petroleum Transport JSC (HOSE: VIP) received a reminder from HOSE regarding delayed disclosure related to...

CORPORATE NEWS | Updated at 15:35:13 · 15/06/2026



## EVENT CALENDAR

Upcoming corporate and macro events

06/2026

30

**LBE**

Cash dividend of VND 2,300/share

Dividend

07/2026

20

**DTT**

Cash dividend of VND 800/share

Dividend

07/2026

15

**HDM**

Cash dividend of VND 1,500/share

Dividend

07/2026

15

**GDW**

Cash dividend of VND 1,900/share

Dividend

07/2026

30

**TDC**

Cash dividend of VND 800/share

Dividend

07/2026

27

**BNW**

Cash dividend of VND 100/share

Dividend

12:00 PM · MID-SESSION



## MID-SESSION UPDATE

Morning market pulse, money flows and key index movements.

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VN-INDEX



VN30



HNX-INDEX



**1,799.31** +0.43%

CHANGE +7.66 pts

TRADING VALUE **16,901.7 bn** | +2,196.7 bn (+14.94%)

**Advancers** 209 **Unchanged** 67 **Decliners** 95

**1,962.48** +0.93%

CHANGE +18.12 pts

TRADING VALUE **9,993.8 bn** | +326.0 bn (+3.37%)

**Advancers** 20 **Unchanged** 2 **Decliners** 8

**310.91** +2.78%

CHANGE +8.42 pts

TRADING VALUE **1,313.5 bn** | +547.0 bn (+71.37%)

**Advancers** **Unchanged** **Decliners**

### MARKET RECAP

VN-Index remained in positive territory for most of the session, opening strongly with a gain of more than 15 points and at one stage extending the advance to nearly 19 points, before closing at 1,799.31, up nearly 8 points. The close above the session average indicates that buying demand remained dominant, reinforcing investor sentiment. The rebound was broad-based, with 209 advancers on HOSE and 20 of 30 VN30 constituents ending higher. Liquidity improved markedly, while foreign investors recorded exceptional net buying of more than VND 4,000 bn, concentrated in large-cap names including VIC, HPG and MWG. Gains in Airlines, Securities, Seaports and Steel provided solid support and offset localized weakness in Oil & Gas, helping the broader market maintain a constructive tone.

### MARKET OUTLOOK

VN-Index closed in positive territory at 1,799 points, while advancers outnumbered decliners, indicating that money flow remained present and broadly supportive. Although the index is below MA10 and MA20 and both RSI and MFI have yet to recover decisively, this pattern is more consistent with consolidation and base-building after the prior advance than with confirmation of a sharp correction. The short-bodied red candle reflects profit-taking at higher levels, but selling pressure was not strong enough to erase the index's gain. In the next session, VN-Index may remain volatile and retest the 1,790–1,800 range. However, positive market breadth provides a basis for stabilization and recovery, particularly if liquidity improves and the index holds this support zone. Money flow is likely to remain selective and rotate toward stocks with idiosyncratic catalysts, including State divestment, private-sector development, market-upgrade prospects and the offshore cycle. Short-term investors may maintain a reasonable equity allocation, avoid chasing rallies, and use volatility to accumulate stocks with strong relative strength, tight bases and healthy liquidity. Leverage should remain controlled to preserve flexibility during market fluctuations. Medium- and long-term investors may continue to scale into fundamentally sound companies with visible earnings growth and reasonable valuations. The preferred strategy is to prioritize market leaders, deploy capital gradually on pullbacks and avoid highly speculative or illiquid names.

### FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions 1/6

### FOREIGN NET FLOW – LAST 6 SESSIONS

↑ Today +4,117

Unit: VND bn · Green bars indicate net buying, red bars indicate net selling · The midline marks neutral flow.

6-session cumulative net buying **+1,042**

Largest move **+4,117**

Reversal session **Today**

T-5

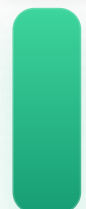
T-4

T-3

T-2

T-1

**Today**



-665

-854

-571

-503

-482

Source: Algo, ASEANSC Research

Key takeaway: Foreign investors posted cumulative net buying of VND 1,042 bn over six sessions, with net buying in 1 of 6 sessions.

FLOW LEADERS

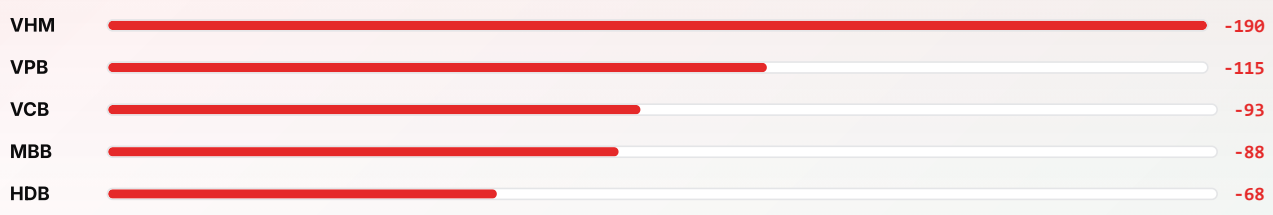
TOP FOREIGN TRADING

Top 5 foreign net-bought and net-sold stocks in the session.

TOP 5 NET BUYS



TOP 5 NET SELLS



15:30 PM · MARKET CLOSE



MARKET CLOSE

Session recap, market outlook and key trading data.

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INDEX SUMMARY

**VN-INDEX** ↑

**1,799.31** +0.43%

CHANGE +7.66 pts

TRADING VALUE **16,901.7 bn** | **+2,196.7 bn** (+14.94%)

Advancers: 209 | Unchanged: 67 | Decliners: 95

**VN30** ↑

**1,962.48** +0.93%

CHANGE +18.12 pts

TRADING VALUE **9,993.8 bn** | **+326.0 bn** (+3.37%)

Advancers: 20 | Unchanged: 2 | Decliners: 8

**HNX-INDEX** ↑

**310.91** +2.78%

CHANGE +8.42 pts

TRADING VALUE **1,313.5 bn** | **+547.0 bn** (+71.37%)

Advancers: | Unchanged: | Decliners:

## MARKET RECAP

VN-Index remained in positive territory for most of the session, opening strongly with a gain of more than 15 points and at one stage extending the advance to nearly 19 points, before closing at 1,799.31, up nearly 8 points. The close above the session average indicates that buying demand remained dominant, reinforcing investor sentiment. The rebound was broad-based, with 209 advancers on HOSE and 20 of 30 VN30 constituents ending higher. Liquidity improved markedly, while foreign investors recorded exceptional net buying of more than VND 4,000 bn, concentrated in large-cap names including VIC, HPG and MWG. Gains in Airlines, Securities, Seaports and Steel provided solid support and offset localized weakness in Oil & Gas, helping the broader market maintain a constructive tone.

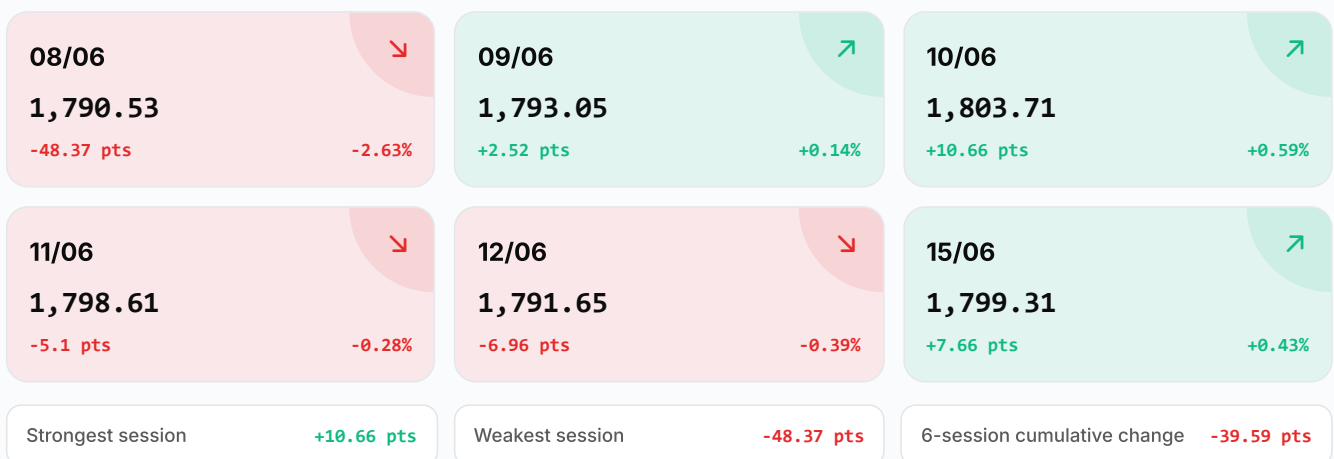
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## VN-INDEX PERFORMANCE OVER THE LAST 6 SESSIONS

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

● ADVANCERS ● DECLINERS ● FLAT



## FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

## FOREIGN NET FLOW – LAST 6 SESSIONS

Unit: VND bn · Green bars indicate net buying, red bars indicate net selling · The midline marks neutral flow.

Today +4.117

6-session cumulative net buying

+1.042

Largest move

+4.117

Reversal session

Today

T-5

T-4

T-3

T-2

T-1

Today



Source: Algo, ASEANSC Research

Key takeaway: Foreign investors posted cumulative net buying of VND 1,042 bn over six sessions, with net buying in 1 of 6 sessions.

FLOW LEADERS

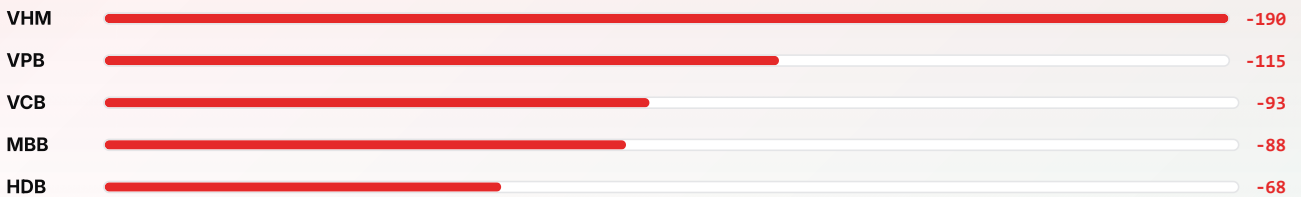
TOP FOREIGN TRADING

Top 5 foreign net-bought and net-sold stocks in the session.

TOP 5 NET BUYS



TOP 5 NET SELLS



MONEY FLOW · HEATMAP

DOMESTIC-FOREIGN MONEY



# FLOW HEATMAP

TIME FRAME

09/06/2026 – 15/06/2026 (1 week)

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

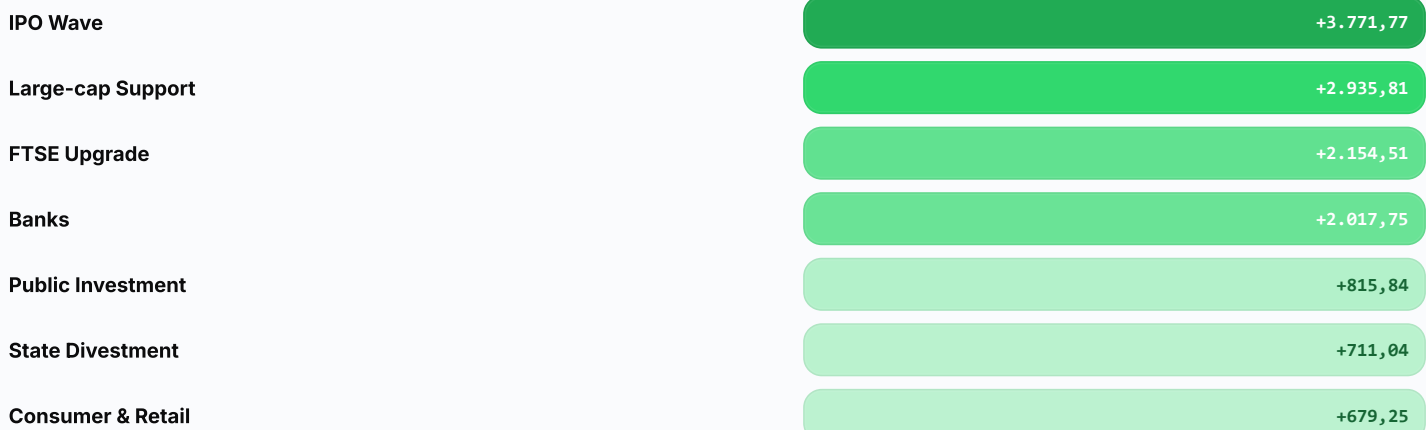
## Foreign Flow Heatmap

1 WEEK



## Domestic Flow Heatmap

1 WEEK



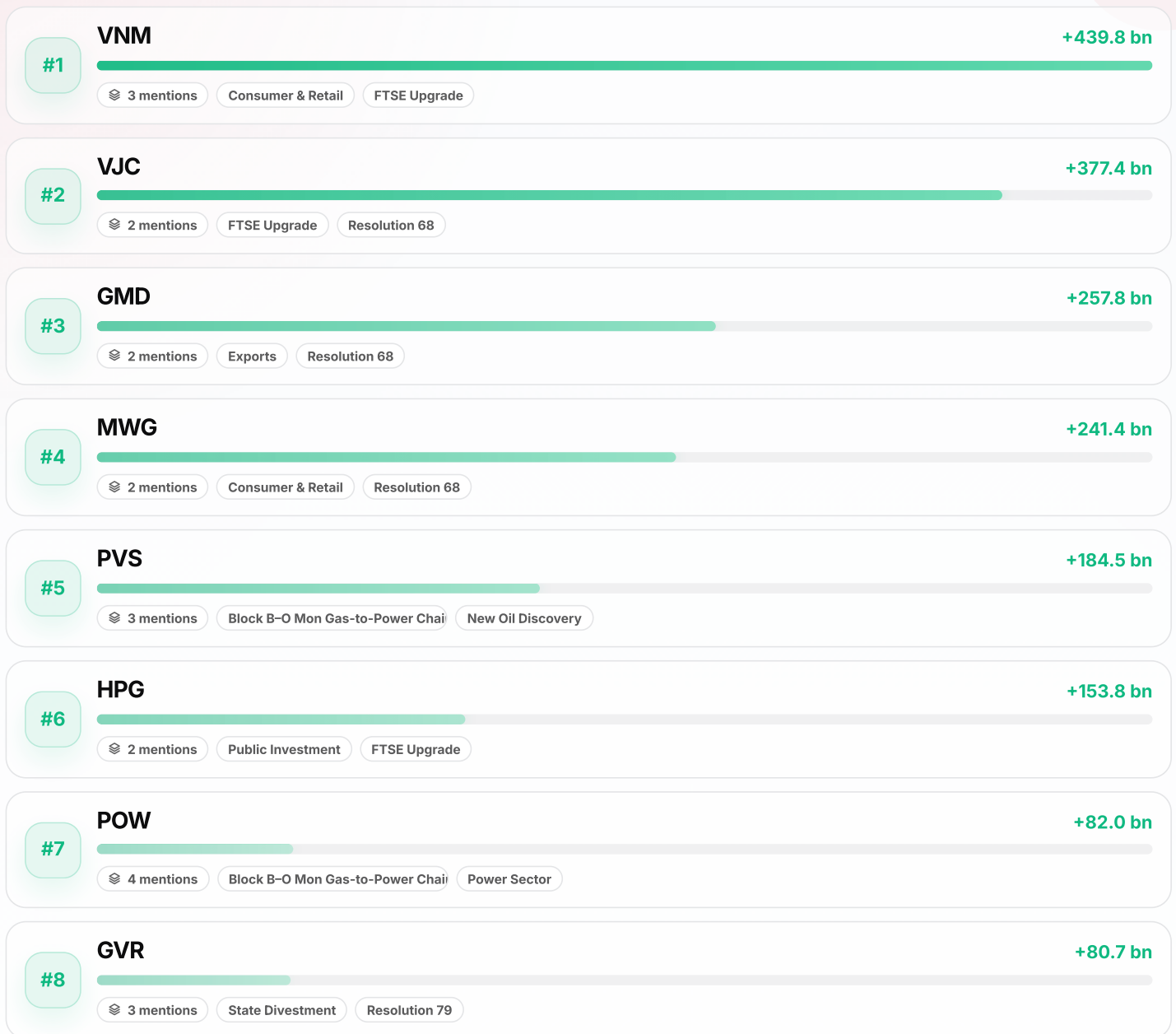


Strong negative Strong positive

## Top Foreign Flow Stocks

TICKER RANKING

Ticker ranking based on cumulative values across TOP\_BUY clusters in the foreign-flow sheet.



PVD

+47.4 bn

#9

3 mentions

Block B-O Mon Gas-to-Power Chair

New Oil Discovery

KBC

+11.9 bn

#10

1 mentions

FDI & Industrial Parks

### Top Domestic Flow Stocks

TICKER RANKING

Ticker ranking based on cumulative values across TOP\_BUY clusters in the domestic-flow sheet.

FPT

+3,392.8 bn

#1

2 mentions

Large-cap Support

Resolution 68

TCB

+3,337.5 bn

#2

3 mentions

Large-cap Support

Banks

CTG

+2,524.4 bn

#3

4 mentions

Large-cap Support

State Divestment

VPB

+2,206.0 bn

#4

2 mentions

Banks

Resolution 68

MBB

+1,810.8 bn

#5

1 mentions

Banks

SSI

+1,355.2 bn

#6

2 mentions

IPO Wave

FTSE Upgrade

HPG

+1,191.2 bn

#7

2 mentions

FTSE Upgrade

Public Investment

VIX

+971.3 bn

#8

1 mentions

IPO Wave

GEX

+595.2 bn

#9

1 mentions

FTSE Upgrade

VND

+553.5 bn

#10

1 mentions

IPO Wave

**DISCLAIMER**

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