

🕒 08:00 AM · PRE-MARKET



MORNING BRIEF

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

Place Order

Research Center

🌐 US EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	51,671.03	+468.77 (0.92%)
S&P 500 derived	7,554.29	+122.83 (1.65%)
Nasdaq	26,683.94	+795.1 (3.07%)
Small Cap 2000 derived	2,965.09	+21.1 (0.72%)
S&P 500 VIX derived	16.18	-0.02 (-0.12%)
S&P/TSX	35,275.64	+337.79 (0.97%)

Sources: Investing.com, Vietstock, ASEANSC Research

📺 ASEAN DIGITAL SECURITIES YOUTUBE CHANNEL

[Visit channel](#)



FEATURED VIDEO

ASEAN Securities Market Flash

YOUTUBE CHANNEL



ASEAN SHORTS

Watch the latest short videos

ASEAN CHANNEL

ASEAN Digital Securities YouTube Shorts

🌐 INTERNATIONAL NEWS



US says Strait of Hormuz transit will be free under new peace agreement — The US expects shipping traffic through the strategic waterway, which handles 20% of global oil flows, to return to pre-conflict levels within...



BOJ raises policy rate to a more than 30-year high — On June 16, the Bank of Japan raised its policy rate to 1%, the highest level in more than three decades, in line with market expectations...

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026



Could Strait of Hormuz traffic recover to 50% within one month? — Shipping traffic through the Strait of Hormuz could recover to nearly 50% of pre-conflict levels within one month if the US-Iran agreement is...

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026



Vice President JD Vance: US-Iran agreement signed electronically — On June 15, US Vice President JD Vance said the agreement would extend the ceasefire between the US and Iran and pave the way for 60 days of technical negotiations...

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026



Fed's new policy framework faces inflation and cost-of-living challenges — Mixed signals on inflation, energy costs and economic growth are complicating the Fed's upcoming interest-rate decision...

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026



Global gold prices rise nearly 3% — Gold extended gains on June 15 for a third consecutive session after the US and Iran said they had reached an agreement...

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026



Oil prices plunge nearly 5% as US and Iran move toward reopening Strait of Hormuz — Global oil prices fell nearly 5% on June 15 after US President Donald Trump said Washington had finalized an agreement with...

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026



Dow Jones hits record high; SpaceX gains another 20% after US-Iran agreement — US equities rallied on June 15, led by technology stocks, as investors welcomed a breakthrough in negotiations...

INTERNATIONAL NEWS

Updated at 15:46:51 · 16/06/2026

DOMESTIC NEWS

[Place Order](#)



The cycle of laws awaiting decrees and decrees awaiting circulars must end

MACRO | 2 hours ago



Wood exports expected to recover soon

NEWS | Today



Shifting peak electricity hours to the evening: Who benefits and who bears the cost?

NEWS | Today



Hanoi issues a series of unprecedented and complex new resolutions

NEWS | Today



New construction-contract regulations effective from July 1

ECONOMY & INVESTMENT 16/06 07:47 | **NEW CONSTRUCTION-CONTRACT REGULATIONS EFFECTIVE FROM JULY 1. THE GOVERNMENT HAS ISSUED DECREE NO. 210/2026/ND-CP DATED** 15/06/2026



Encouraging the use of waste soil and rock from mining and mineral processing to produce construction materials

NEWS | Today

CORPORATE NEWS

[Place Order](#)



BAF launches high-tech farm and targets production costs below VND40,000/kg — During an investor visit to the Giai Xuan high-tech livestock project in Nghe An, representatives of BAF Vietnam Agriculture JSC (HOSE: BAF)...

CORPORATE NEWS | Updated at 15:46:51 · 16/06/2026



Companies linked to Shark Lien and CC1 develop two industrial parks worth nearly VND7tn in Can Tho — The Tan Hoa and Dai Ngai industrial park projects cover more than 400 hectares and require nearly VND7tn of investment, with plans for a multi-functional model...

CORPORATE NEWS | Updated at 15:46:51 · 16/06/2026



VPC loses public-company status after auditor disclaims opinion; company says it has had no time to address the issue — Vietnam Power Investment and Development JSC (UPCoM: VPC) reported negative equity of nearly VND9bn and no longer meets public-company requirements...

CORPORATE NEWS | Updated at 15:46:51 · 16/06/2026



Debt-to-equity swap turns creditor into HU1's parent company — HUD1 Investment and Construction JSC (HOSE: HU1) announced that Hanoi Urban Investment JSC (Ha Noi Uri) became a major shareholder following a debt conversion...

CORPORATE NEWS | Updated at 15:46:51 · 16/06/2026



WinCommerce generates nearly VND19tn in revenue in 5M26 — WinCommerce General Commercial Services JSC, a member of Masan Group (HOSE: MSN), has released its business results for the first five months of the year...

CORPORATE NEWS | Updated at 15:46:51 · 16/06/2026



From Thailand to Vietnam: Who benefits as alternative finance becomes standardized? — Two decades ago, vehicle-registration-backed lending in Thailand was considered a fringe financial segment serving customers who...

CORPORATE NEWS | Updated at 15:46:51 · 16/06/2026



EVENT CALENDAR

Upcoming corporate and macro events

07/2026

22

AMC

Cash dividend of VND900/share

Dividend

07/2026

16

HC3

Cash dividend of VND1,000/share

Dividend

07/2026

16

ARM

Cash dividend of VND1,000/share

Dividend

07/2026

24

QNP

Cash dividend of VND1,400/share

Dividend

06/2026

29

CCP

Cash dividend of VND1,000/share

Dividend

06/2026

29

VCS

Cash dividend of VND2,000/share

Dividend



MID-SESSION UPDATE

Morning market pulse, money flows and key index movements.

[Place Order](#)

[Research Center](#)

VN-INDEX

1,807.94

+0.48%

CHANGE

+8.63 pts

GTGD

VND14,327.1bn | -
VND2,670.1bn (-15.71%)

Advancers
187

Unchanged
74

Decliners
113

VN30

1,960.19

-0.12%

CHANGE

-2.29 pts

GTGD

VND6,900.3bn | -VND3,075.3bn
(-30.83%)

Advancers
15

Unchanged
6

Decliners
9

HNX-INDEX

319.62

+2.8%

CHANGE

+8.71 pts

GTGD

VND1,056.9bn | -VND258.2bn
(-19.64%)

Advancers

Unchanged

Decliners

MARKET RECAP

The VN-Index remained in positive territory for most of the session and closed nearly 9 points higher. The index held above its intraday average, indicating that demand remained dominant despite a significant decline in liquidity versus the previous session. Market breadth was positive on HOSE, with 187 advancers, led by gains in securities, real estate, aviation and construction stocks, supporting a clear improvement in investor sentiment. However, the rally remained selective, as nine VN30 constituents declined. Foreign investors also recorded net selling of VND363bn, mainly in VHM, MBB and TCB. Cautious cash flow and selling pressure in selected stocks suggest that, while the market maintained its recovery trend, sustaining a durable breakout remains challenging.

MARKET OUTLOOK

From a technical perspective, the VN-Index maintained a cautiously positive tone, closing at 1,808 points. Advancers outnumbered decliners, while cash flow was notably concentrated in securities stocks, indicating that demand remained present and was gradually broadening. The Doji candlestick reflected indecision near the session highs. RSI at 42 and MFI at 26 suggested that upward momentum was not yet strong, but still had room to improve as liquidity returned. The index holding above MA10 supports the near-term recovery. Should demand strengthen further—particularly in securities and large-cap stocks—the VN-Index could retest resistance at 1,820–1,830 points. The 1,800–1,810-point range remains the nearest support and may provide a base for the next advance. With market breadth tilted positively, short-term investors may maintain a moderately high equity exposure, prioritize holding positions with favorable trends and selectively add during pullbacks rather than chase sharp rallies. Cash flow may continue rotating into securities, banks and stocks benefiting from market-upgrade expectations, State divestments, private-sector development, public investment and the offshore oil & gas cycle. For medium- and long-term investors, pullbacks toward support remain opportunities to accumulate fundamentally sound, liquid companies with visible growth prospects.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOW – LAST 6 SESSIONS

Today -345

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

Six-session cumulative net flow

+1.437

Largest move

+4.192

Reversal session

T-1

T-5

T-4

T-3

T-2

T4192

Today



Source: Algo, ASEANSC Research

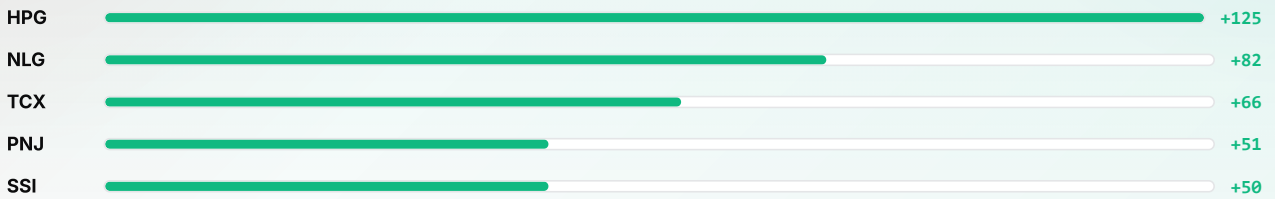
Highlight: foreign investors recorded cumulative net buying of VND1,437bn over six sessions, with one net-buying session.

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.

[Place Order](#)

[Research Center](#)

INDEX SUMMARY

<p>VN-INDEX ↑</p> <p>1,807.94 +0.48%</p> <p>CHANGE +8.63 pts</p> <p>GTGD VND14,327.1bn -VND2,670.1bn (-15.71%)</p>	<p>VN30 ↓</p> <p>1,960.19 -0.12%</p> <p>CHANGE -2.29 pts</p> <p>GTGD VND6,900.3bn -VND3,075.3bn (-30.83%)</p>	<p>HNX-INDEX ↑</p> <p>319.62 +2.8%</p> <p>CHANGE +8.71 pts</p> <p>GTGD VND1,056.9bn -VND258.2bn (-19.64%)</p>
--	---	---

Advancers
187

Unchanged
74

Decliners
113

Advancers
15

Unchanged
6

Decliners
9

Advancers

Unchanged

Decliners

MARKET RECAP

The VN-Index remained in positive territory for most of the session and closed nearly 9 points higher. The index held above its intraday average, indicating that demand remained dominant despite a significant decline in liquidity versus the previous session. Market breadth was positive on HOSE, with 187 advancers, led by gains in securities, real estate, aviation and construction stocks, supporting a clear improvement in investor sentiment. However, the rally remained selective, as nine VN30 constituents declined. Foreign investors also recorded net selling of VND363bn, mainly in VHM, MBB and TCB. Cautious cash flow and selling pressure in selected stocks suggest that, while the market maintained its recovery trend, sustaining a durable breakout remains challenging.

MARKET OUTLOOK

From a technical perspective, the VN-Index maintained a cautiously positive tone, closing at 1,808 points. Advancers outnumbered decliners, while cash flow was notably concentrated in securities stocks, indicating that demand remained present and was gradually broadening. The Doji candlestick reflected indecision near the session highs. RSI at 42 and MFI at 26 suggested that upward momentum was not yet strong, but still had room to improve as liquidity returned. The index holding above MA10 supports the near-term recovery. Should demand strengthen further—particularly in securities and large-cap stocks—the VN-Index could retest resistance at 1,820–1,830 points. The 1,800–1,810-point range remains the nearest support and may provide a base for the next advance. With market breadth tilted positively, short-term investors may maintain a moderately high equity exposure, prioritize holding positions with favorable trends and selectively add during pullbacks rather than chase sharp rallies. Cash flow may continue rotating into securities, banks and stocks benefiting from market-upgrade expectations, State divestments, private-sector development, public investment and the offshore oil & gas cycle. For medium- and long-term investors, pullbacks toward support remain opportunities to accumulate fundamentally sound, liquid companies with visible growth prospects.

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

09/06

1,793.05

+2.52 pts

+0.14%

10/06

1,803.71

+10.66 pts

+0.59%

11/06

1,798.61

-5.1 pts

-0.28%

12/06

1,791.65

-6.96 pts

-0.39%

15/06

1,799.31

+7.66 pts

+0.43%

16/06

1,807.94

+8.63 pts

+0.48%

Strongest session

+10.66 pts

Weakest session

-6.96 pts

6-session cumulative change

+17.41 pts

FOREIGN NET FLOW – LAST 6 SESSIONS

Today -345

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

Six-session cumulative net flow **+1.437** Largest move **+4.192** Reversal session **T-1**



Source: Algo, ASEANSC Research

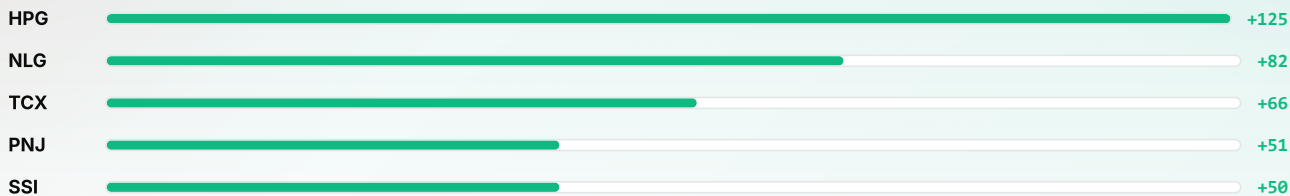
Highlight: foreign investors recorded cumulative net buying of VND1,437bn over six sessions, with one net-buying session.

FLOW LEADERS

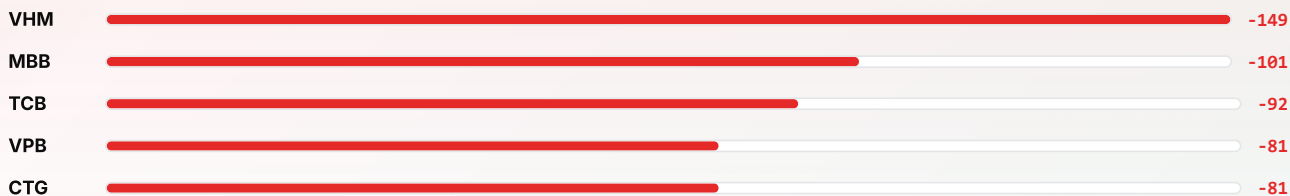
TOP FOREIGN TRADING

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

TOP 5 NET BUYS



TOP 5 NET SELLS





DOMESTIC-FOREIGN MONEY FLOW HEATMAP

Summarizes domestic and foreign cash-flow preferences across key investment themes over a one-week observation period.

TIME FRAME
June 10-16, 2026 (1 week)

Place Order

Research Center

Foreign Flow Heatmap

🕒 1 WEEK

Consumer & retail	+334,78
Public investment	+244,91
Exports	+100,21
IPO wave	+87,29
Power sector	+49,46
Block B-O Mon gas-to-power chain	-8,77
FDI & industrial parks	-40,89
New oil discoveries	-51,23
Earnings season	-174,09
US-Iran	-197,69
State divestments	-352,8
Resolution 79	-360,86
FTSE market upgrade	-398,83
Real estate	-607,04
Large-cap support	-1.051,85
Resolution 68	-1.103,61
Banks	-1.568,09

Domestic Flow Heatmap

🕒 1 WEEK

IPO wave	+5.502,7
Large-cap support	+2.348,8
Banks	+1.878,62
FTSE market upgrade	+1.787,06
State divestments	+1.536,64
Resolution 79	+1.369,15

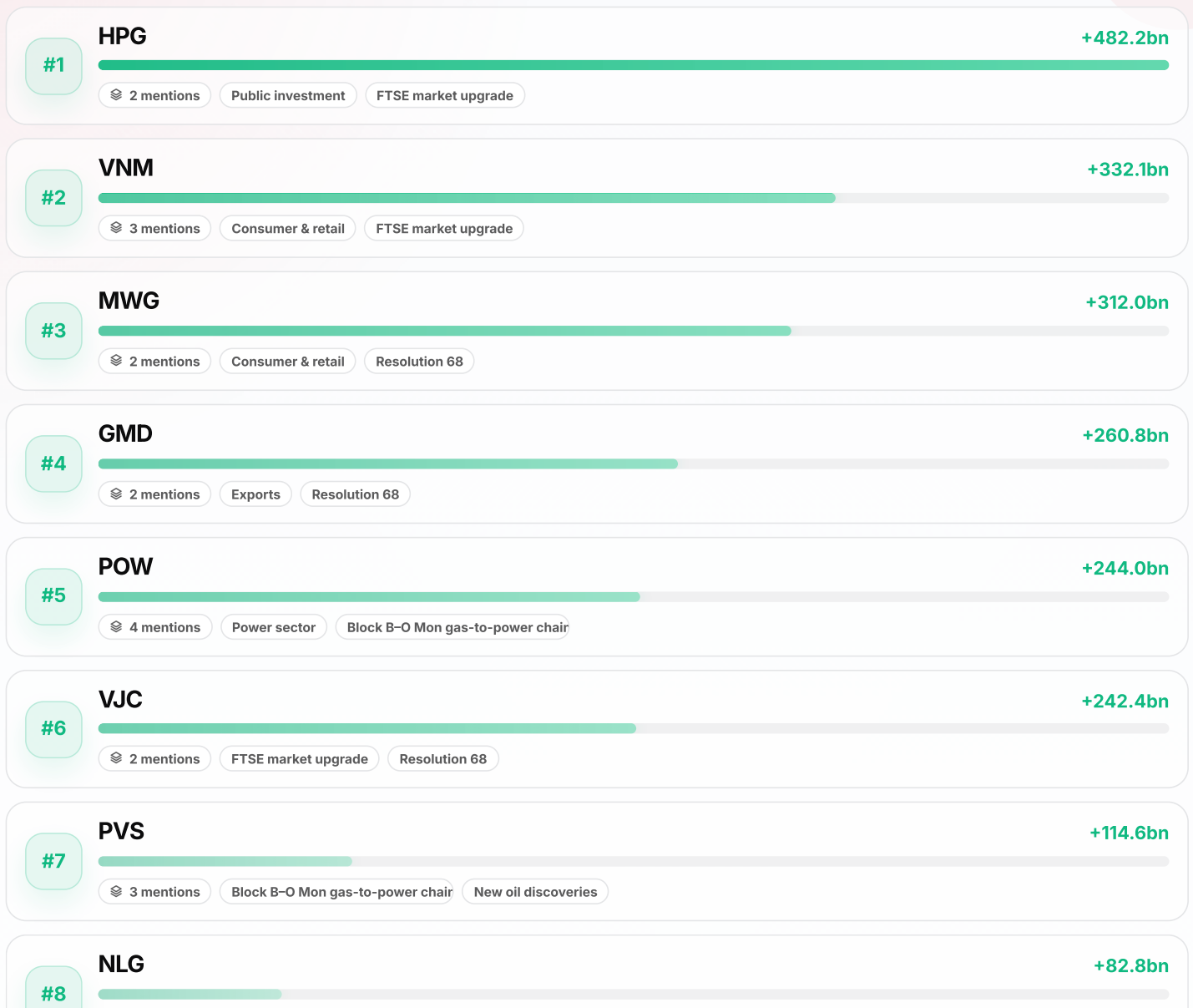


Strong negative Strong positive

Top Foreign Flow Stocks

TICKER RANKING

Ticker ranking based on cumulative values across TOP_BUY clusters in the foreign-flow sheet.



1 mentions Real estate

FRT

+82.2bn

#9

1 mentions Consumer & retail

PVD

+78.3bn

#10

3 mentions Block B-O Mon gas-to-power chair New oil discoveries

Top Domestic Flow Stocks

TICKER RANKING

Ticker ranking based on cumulative values across TOP_BUY clusters in the domestic-flow sheet.

TCB

+3,111.3bn

#1

3 mentions Large-cap support Banks

VPB

+2,523.2bn

#2

2 mentions Banks Resolution 68

CTG

+2,263.6bn

#3

4 mentions Large-cap support State divestments

SSI

+1,991.6bn

#4

2 mentions IPO wave FTSE market upgrade

MBB

+1,296.8bn

#5

1 mentions Banks

VIX

+1,274.2bn

#6

1 mentions IPO wave

POW

+943.2bn

#7

4 mentions State divestments Resolution 79

SHS

+819.1bn

#8

1 mentions IPO wave

HDB

+718.1bn

#9

1 mentions Resolution 68

VCB

+645.2bn

#10

2 mentions State divestments Resolution 79

DISCLAIMER

This market report contains subjective views based on sources believed to be reliable and on detailed, prudent analysis. ASEANSC does not warrant the absolute accuracy or completeness of such information. This report is prepared solely for informational purposes and does not constitute any offer, solicitation or specific recommendation to buy or sell securities. Investors should use this report only as a reference and remain fully responsible for their own investment decisions. Our views and estimates are valid as of the report date and may change without prior notice. This report is copyrighted by ASEANSC. Any reproduction, distribution or modification without ASEANSC's prior consent is prohibited.



ASEAN SECURITIES JOINT STOCK COMPANY

Website: www.aseansc.com.vn

HEAD OFFICE

4th–7th Floors, No. 3 Dang Thai Than Street,
Cua Nam Ward, Hanoi.

Tel: 024 6275 8668

Order hotline: **024 6275 8888**

HO CHI MINH CITY BRANCH

2nd Floor, 77–79 Pho Duc Chinh Street,
Ben Thanh Ward, Ho Chi Minh City.

Tel: 028 3933 0308

Order hotline: **028 3933 0309**



 **DOWNLOAD APP**