

🕒 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	51,999.67	+328.64 (0.64%)
S&P 500 derived	7,511.35	-42.94 (-0.57%)
Nasdaq	26,376.34	-307.6 (-1.15%)
Small Cap 2000 derived	2,939.19	-25.9 (-0.87%)
S&P 500 VIX derived	16.38	-0.03 (-0.18%)
S&P/TSX	35,389.58	+113.94 (0.32%)

Sources: Investing.com, Vietstock, ASEANSC Research

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## 🌐 INTERNATIONAL NEWS



**Why are central banks accelerating gold repatriation?** — A growing number of central banks are choosing to store gold domestically rather than at overseas financial centres, amid expectations...



**Europe approves tariff agreement with the U.S.** — On June 16, the European Parliament formally approved the tariff agreement between the European Union and the United States, concluding months of negotiations...

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026



**Pizza Hut changes ownership** — On June 16, Yum Brands announced the sale of the Pizza Hut chain to private equity firm LongRange Capital for approximately USD 1.5bn.

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026



**What to expect from Fed Chair Kevin Warsh's first meeting?** — On June 17 (early June 18 Vietnam time), the U.S. Federal Reserve will announce its interest-rate decision under newly appointed Chair Kevin Warsh.

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026



**U.S. Supreme Court leaves China tariff ruling intact** — The Court upheld a 2025 Federal Circuit ruling that recognised the Trump administration's authority to broaden tariffs on Chinese goods...

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026



**Wall Street bends to Elon Musk** — In SpaceX's USD 75bn equity fundraising, leading investment banks accepted unusually low fees and relinquished...

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026



**Global gold prices rise for a fourth consecutive session** — Gold advanced on June 16 after the U.S. and Iran reached a temporary peace agreement, easing oil prices and inflation concerns...

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026



**WTI falls nearly another 6%; Brent drops below USD 80/bbl** — Oil prices fell to a three-month low on June 16 following reports that the U.S. would allow Iran to immediately resume export operations...

INTERNATIONAL  
NEWS

Updated at 17:09:02 ·  
17/06/2026

## DOMESTIC NEWS

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**Deputy PM Nguyen Van Thang: Prioritise ODA for major projects**

ECONOMY & INVESTMENT |  2 hours ago



**Remove the fear-of-mistakes constraint to unlock SOE potential**

NEWS |  Today



**Growth drivers and the fiscal paradox**

NEWS |  Today



**Do not compromise technical safety to accelerate the Lao Cai–Hai Phong railway**

NEWS |  Today



**FDI attraction cannot rely solely on major multinationals**

NEWS |  Today



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

NEWS |  Today

## CORPORATE NEWS

 Place Order



**BAB sets record date for an 80mn-share stock dividend** — Bac A Bank (HNX: BAB) announced June 26 as the record date for its 2025 stock dividend to existing shareholders, equivalent to...

**CORPORATE NEWS** | Updated at 17:09:02 · 17/06/2026



**BHH plans VND 4.2bn dividend payout as shares rise on thin liquidity** — Hanoi-Hung Yen Beer 89 JSC (UPCoM: BHH) announced June 26 as the record date for its 2025 dividend. The ex-dividend date is...

**CORPORATE NEWS** | Updated at 17:09:02 · 17/06/2026



**Dai Viet Securities plans to list 25mn shares on UPCoM and return to profit after restructuring** — After posting a nearly VND 14bn loss in 2025, Dai Viet Securities targets more than VND 4.6bn in 2026 pretax profit and also plans to register...

**CORPORATE NEWS** | Updated at 17:09:02 · 17/06/2026



**MWG records nearly VND 80tn revenue in 5M26** — In its latest 5M26 business update, Mobile World Investment Corp. (HOSE: MWG) reported revenue of nearly VND 79.2tn...

**CORPORATE NEWS** | Updated at 17:09:02 · 17/06/2026



**EVNGENCO3 AGM: 2026 output target up 19%** — At its 2026 AGM, Power Generation Corporation 3 (EVNGENCO3, HOSE: PGV) set a 2026 electricity output target of nearly 27.7bn kWh, up 19%...

**CORPORATE NEWS** | Updated at 17:09:02 · 17/06/2026



**FECON nominates former KIDO executive to its Board** — With no shareholder nominations received, FECON introduced Tran Quoc Viet, a former senior executive at Ecopark, KIDO, and Biti's, as a Board candidate...

**CORPORATE NEWS** | Updated at 17:09:02 · 17/06/2026



## EVENT CALENDAR

Upcoming corporate and macro events

07/2026

10

**KHP**

Cash dividend of VND 500/share

Dividend

07/2026

30

**VNP**

Cash dividend of VND 800/share

Dividend

07/2026

10

**SSH**

Cash dividend of VND 650/share

Dividend

08/2026

13

**NTH**

Cash dividend of VND 1,500/share

Dividend

07/2026

31

**TKU**

Cash dividend of VND 500/share

Dividend

07/2026

23

**HFB**

Cash dividend of VND 600/share

Dividend


12:00 PM · MID-SESSION



# MID-SESSION UPDATE

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**VN-INDEX** 

**1,805.12** -0.16%


CHANGE -2.82 pts

GTGD VND15,865.7bn | +VND1,511.2bn (+10.53%)

Advancers  
165

Unchanged  
57

Decliners  
140

**VN30** 

**1,957.35** -0.14%


CHANGE -2.84 pts

GTGD VND9,029.7bn | +VND2,145.0bn (+31.16%)

Advancers  
18

Unchanged  
0

Decliners  
12

**HNX-INDEX** 

**330.22** +3.32%

CHANGE +10.6 pts

GTGD VND899.9bn | -VND158.4bn (-14.97%)

Advancers

Unchanged

Decliners

### MARKET RECAP

VN-Index closed nearly 2 points lower, but the session still showed a constructive signal as bargain-hunting demand strengthened markedly in the latter half of the afternoon, allowing the index to finish above its intraday average. Liquidity improved visibly, while advancers outnumbered decliners on HOSE, indicating that investors continued to seek opportunities on pullbacks, particularly in seaport, seafood, and fertilizer-chemical stocks. Nevertheless, weakness in aviation and real estate, together with divergence within the VN30 basket, capped the rebound. This was compounded by foreign net selling of more than VND 3.1tn, concentrated in large-cap names such as VIC, FPT, VHM, and TCB, preventing the market from staging a stronger breakout.

### MARKET OUTLOOK

From a technical perspective, VN-Index is showing a neutral signal after closing at 1,806 points between the MA10 and MA20. This indicates that bargain-hunting demand emerged and narrowed the decline, but has yet to establish a clear recovery trend. RSI at 41 and MFI at 26 suggest that both price momentum and market inflows remain weak, warranting caution until the index clears key technical resistance levels. Under the base case, the market is likely to remain range-bound early in the session before a clearer direction emerges later in the day. Short-term investors should therefore maintain moderate exposure, avoid chasing strength, and trade within the 1,800-1,830 range, while prioritising stocks with idiosyncratic catalysts such as SOE divestment, economic-development resolutions, the market-upgrade roadmap, or the offshore oil & gas cycle. Medium- and long-term investors may continue to accumulate selectively on pullbacks toward support, focusing on fundamentally sound, liquid names in banking, securities, retail, public investment, and oil & gas.

### FOREIGN FLOW SPOTLIGHT

 Net-buying sessions 1/6

### FOREIGN NET FLOW – LAST 6 SESSIONS

 Today -966

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

6-session cumulative net flow

**+1.331**

Largest move

**+4.192**

Reversal session

**T-2**

T-5

T-4

T-3

 **T-2 92**

T-1

Today



-571

-503

-482

-339

-966

Source: Algo, ASEANSC Research

Key takeaway: Foreign investors recorded cumulative net buying of VND 1,331bn over the past six sessions, with net buying in 1/6 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

1,805.12

-0.16%

CHANGE

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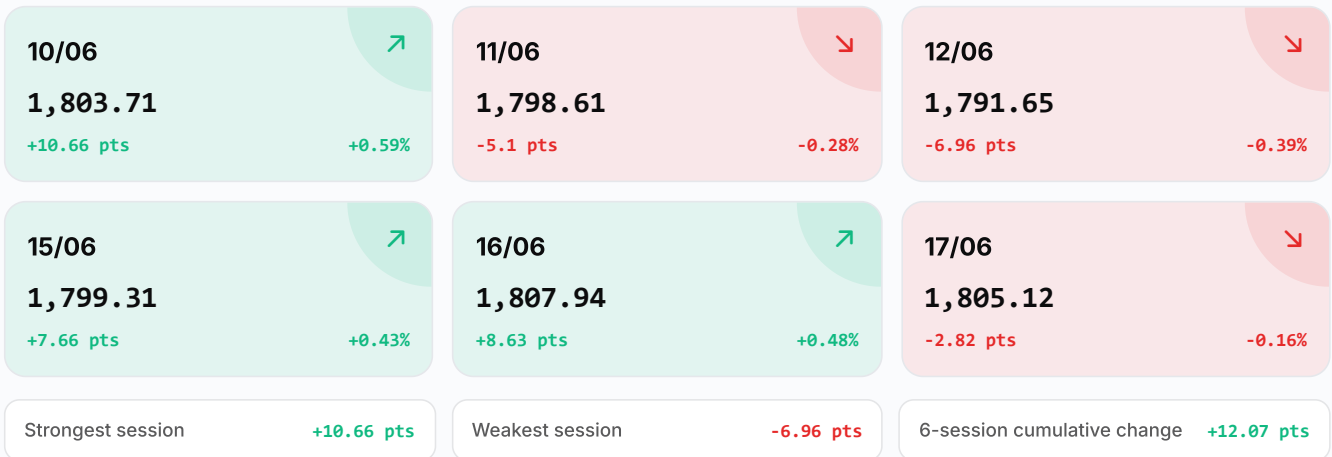
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## VN-INDEX PERFORMANCE OVER THE LAST 6 SESSIONS

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

■ ADVANCERS 
 ■ DECLINERS 
 ■ FLAT



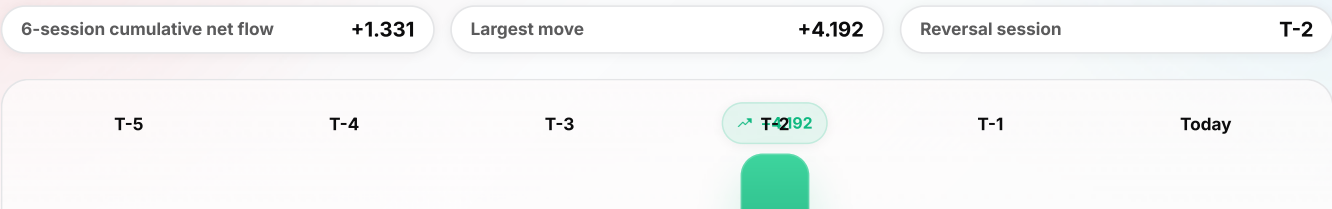
## FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

## FOREIGN NET FLOW – LAST 6 SESSIONS

Today -966

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





Source: Algo, ASEANSC Research

Key takeaway: Foreign investors recorded cumulative net buying of VND 1,331bn over the past six sessions, with net buying in 1/6 sessions.

**FLOW LEADERS**

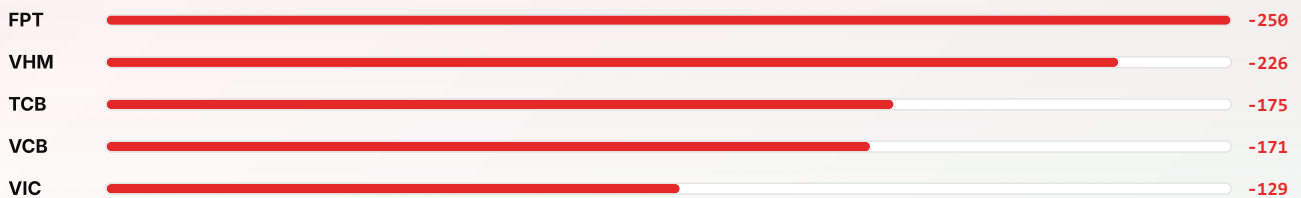
**TOP FOREIGN TRADING**

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  
11/06/2026 – 17/06/2026 (1 tuần)

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

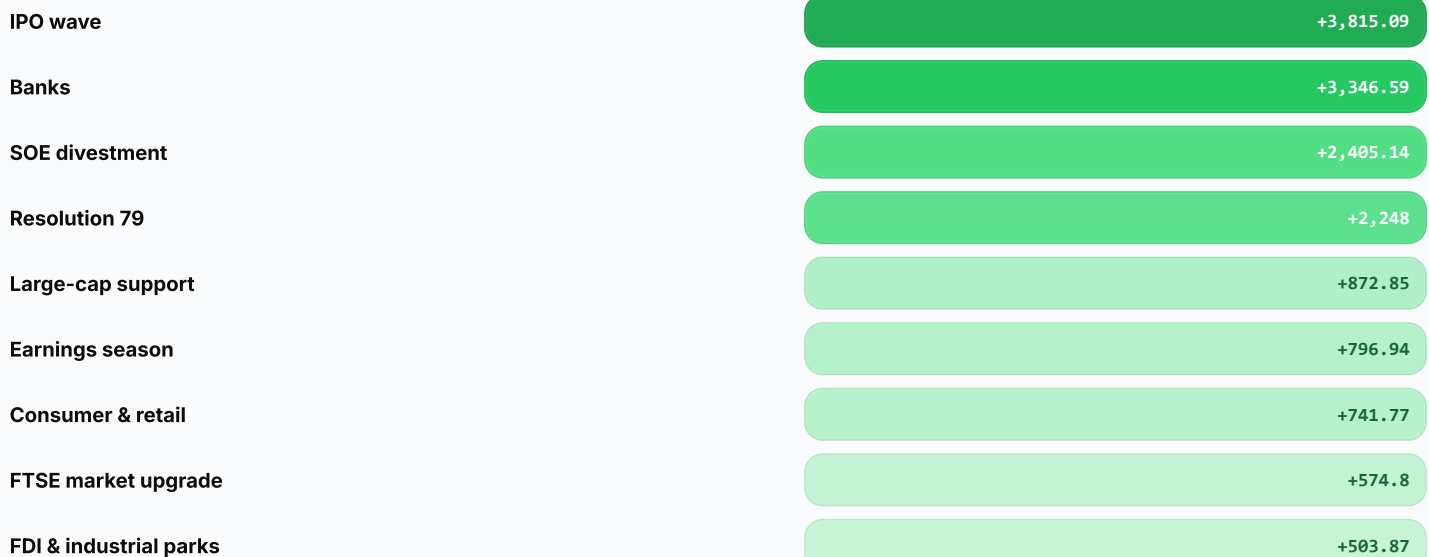
## Foreign Flow Heatmap

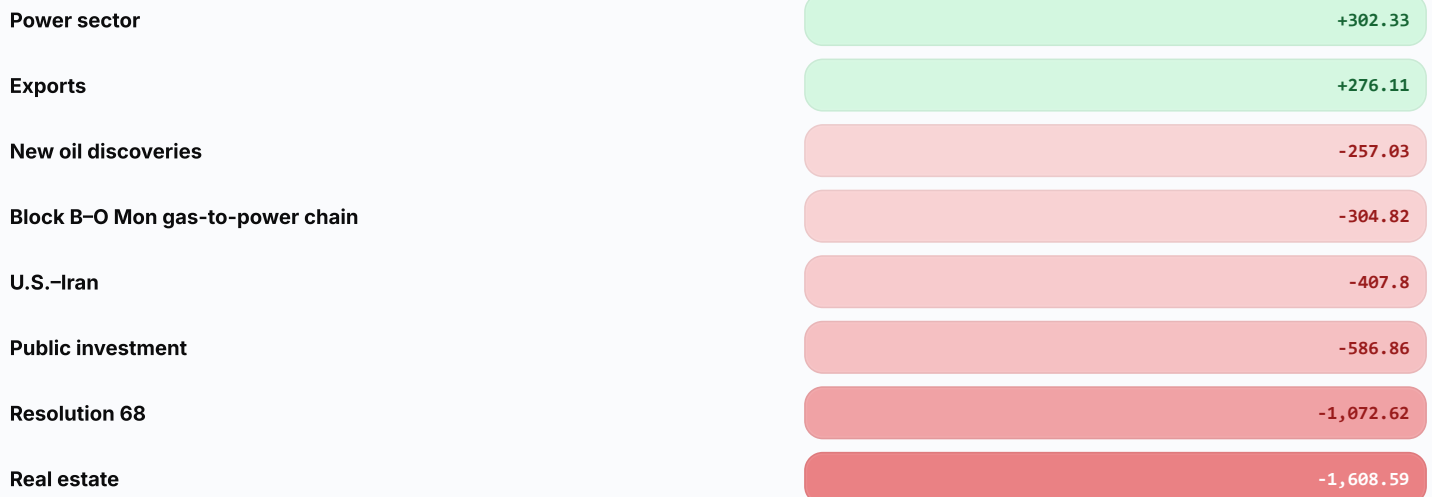
📅 1 WEEK



## Domestic Flow Heatmap

📅 1 WEEK



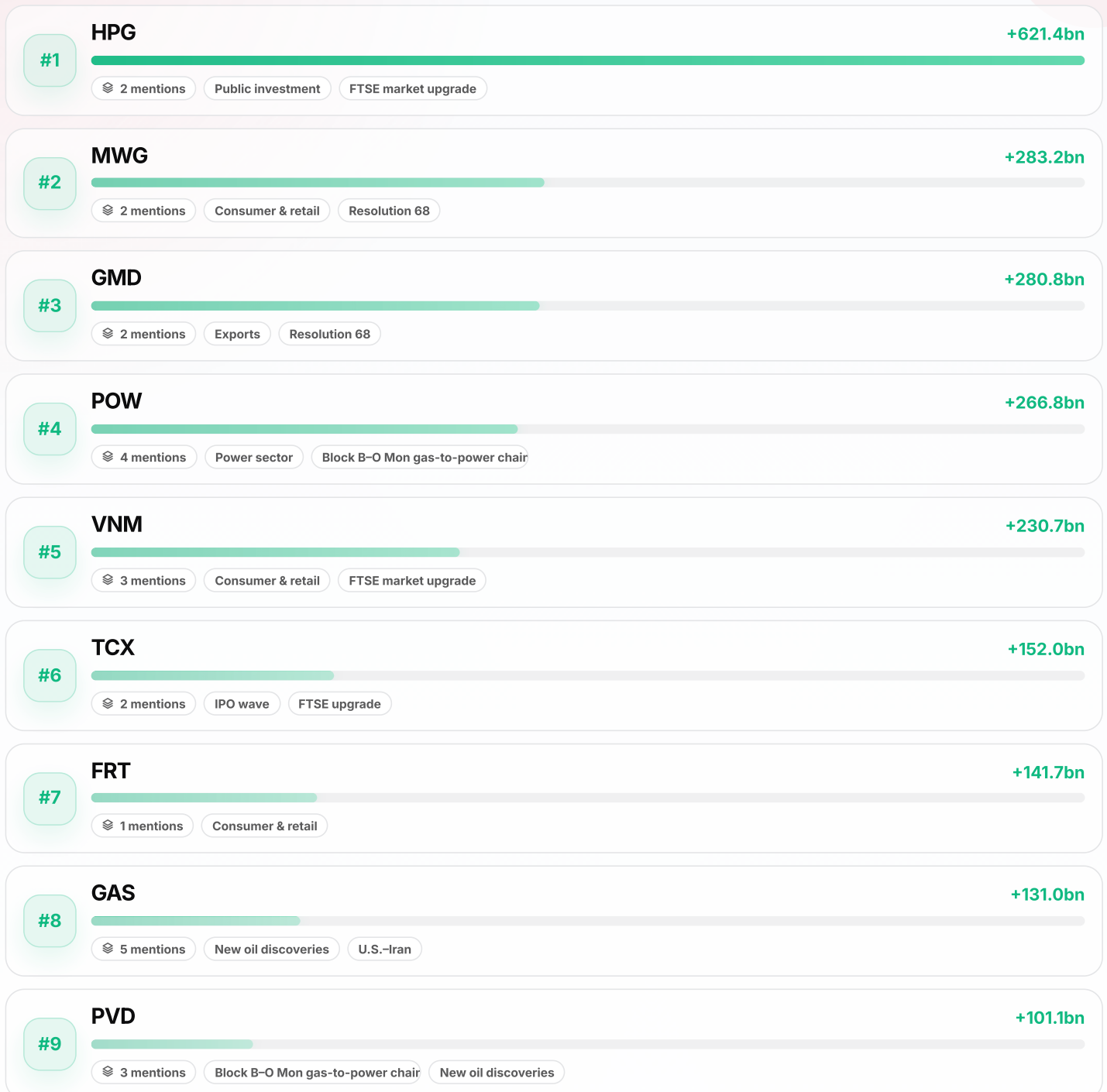


Strong negative Strong positive

## Top Foreign Flow Stocks

TICKER RANKING

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



#10

PVS

+82.8bn

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.

#1

CTG

+3,984.5bn

5 mentions

Banks

SOE divestment

#2

VCB

+3,120.4bn

4 mentions

SOE divestment

Resolution 79

#3

VPB

+2,602.4bn

2 mentions

Banks

Resolution 68

#4

SSI

+2,137.2bn

2 mentions

IPO wave

FTSE market upgrade

#5

GEX

+1,966.4bn

2 mentions

FTSE upgrade

Resolution 68

#6

MBB

+1,277.4bn

1 mentions

Banks

#7

VIX

+1,090.0bn

1 mentions

IPO wave

#8

BID

+765.4bn

2 mentions

State divestments

Resolution 79

#9

HDB

+758.0bn

1 mentions

Resolution 68

#10

TCB

+591.6bn

1 mentions

Large-cap support

### DISCLAIMER

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## ASEAN SECURITIES JOINT STOCK COMPANY

Website: [www.aseansc.com.vn](http://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**



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