

08:00 AM · PRE-MARKET



MORNING BRIEF

Key macro developments and notable signals before the trading session.

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Research Center

U.S. EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	51,492.55	-507.12 (-0.98%)
S&P 500 derived	7,420.10	-91.25 (-1.21%)
Nasdaq	26,021.66	-354.69 (-1.34%)
Small Cap 2000 derived	2,917.98	-21.21 (-0.72%)
S&P 500 VIX derived	16.91	-1.52 (-8.25%)
S&P/TSX	35,125.11	-264.47 (-0.75%)

Source: Investing.com, Vietstock, ASEANSC compiled

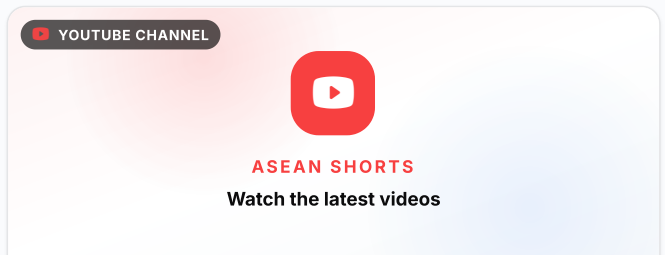
ASEAN DIGITAL SECURITIES YOUTUBE CHANNEL

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FEATURED VIDEO

Quick market update from ASEAN Securities



ASEAN CHANNEL

ASEAN Digital Securities YouTube Shorts

INTERNATIONAL NEWS



Yen falls to a 23-month low, raising FX intervention pressure — The yen slipped on the morning of June 18 to a 23-month low of JPY160.80/USD, breaking a sensitive threshold that could trigger...



Major central banks diverge on interest-rate decisions — While Indonesia, the Philippines and Japan maintained a tightening bias to protect their currencies and contain inflation, the Bank of England...

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026



What to invest in during World Cup 2026, the most expensive tournament in history? — World Cup-related consumer stocks are trading at historically attractive valuations; the standout name in the European equity index...

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026



U.S. and Iranian presidents sign peace agreement — The U.S. and Iran electronically signed a temporary agreement to extend the ceasefire between the two countries.

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026



Five key takeaways from Fed Chair Kevin Warsh's first meeting — At new Chair Kevin Warsh's first meeting, the U.S. Federal Reserve kept rates unchanged as expected by the market. However...

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026



Global gold prices fall sharply after the Fed meeting — Gold prices fell sharply on June 17 as investors assessed the U.S. Federal Reserve's first policy decision under...

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026



Oil prices edge higher — Oil prices rose nearly 1% on June 17 after U.S. President Donald Trump said the new ceasefire agreement with Iran was not yet...

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026



Dow Jones loses more than 500 points after the new Fed Chair's first meeting — U.S. equities fell in the June 17 session, while Treasury yields rose sharply after Federal Reserve officials...

INTERNATIONAL NEWS

Updated at 16:07:29 · 18/06/2026

DOMESTIC NEWS

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The Kevin Warsh era and the monetary policy transition

MACRO | 4 hours ago



Government targets at least 10 large-scale strategic technology enterprises by 2030

ECONOMY - INVESTMENT 18/06 09:32
GOVERNMENT TARGETS AT LEAST 10
LARGE-SCALE STRATEGIC TECHNOLOGY
ENTERPRISES BY 2030. DEPUTY PRIME
MINISTER HO QUOC DUNG HAS SIGNED
DECISION NO. 1091/QD-TTG DATED 17/6/2026



Ministry of Finance explains why Vietnam recorded a trade deficit of over USD15bn

NEWS | Today



Trade first, finance later?

NEWS | Today



Deputy Prime Minister Nguyen Van Thang: Prioritize ODA for major projects

NEWS | Today



Removing the "fear of making mistakes" constraint to unlock SOE strength

NEWS | Today

CORPORATE NEWS

Place Order



ACV: Violations at Long Thanh airport were 'beyond control'; profit expected to fall by over



HCMC Inspectorate names Novaland, Hodeco, Ha Do, Becamex and NRC — After more than one

40% — In documents prepared for the 2026 AGM, Airports Corporation of Vietnam (UPCoM: ACV) addressed incidents at the project for the first time...

CORPORATE NEWS | Updated at 16:07:29 · 18/06/2026

month of review, the HCMC Inspectorate identified handling directions for 70 of 95 long-stalled projects, including many projects of...

CORPORATE NEWS | Updated at 16:07:29 · 18/06/2026



Vinamilk included in Fortune SEA 500 for the third consecutive year — Being named in Fortune Southeast Asia 500 for the third consecutive year, Vinamilk once again affirmed the strength of a Vietnamese dairy brand...

CORPORATE NEWS | Updated at 16:07:29 · 18/06/2026



Thong Nhat Rubber unexpectedly postpones AGM close to the meeting date — Thong Nhat Rubber JSC's (HOSE: TNC) 2026 AGM was postponed to late July as the State shareholder holding 51% had not completed procedures...

CORPORATE NEWS | Updated at 16:07:29 · 18/06/2026



PVS AGM: Conservative targets after a record-profit year; capex rises sharply for mega projects — At the 2026 AGM held on the morning of June 18, PetroVietnam Technical Services Corporation (PTSC, HNX: PVS) presented a business plan...

CORPORATE NEWS | Updated at 16:07:29 · 18/06/2026



Real estate continues to attract trillion-dong funding via private bond placements — Many property developers continued to raise trillion-dong funding through private bond placements in May. Meanwhile, banks...

CORPORATE NEWS | Updated at 16:07:29 · 18/06/2026



EVENT CALENDAR

Upcoming corporate and macro events

07/2026

10

KHP

Cash dividend payment 500 VND/share

Dividend

07/2026

30

VNP

Cash dividend payment 800 VND/share

Dividend

07/2026

10

SSH

Cash dividend payment 650 VND/share

Dividend

08/2026

13

NTH

Cash dividend payment 1,500 VND/share

Dividend

07/2026

31

TKU

Cash dividend payment 500 VND/share

Dividend

07/2026

23

HFB

Cash dividend payment 600 VND/share

Dividend

🕒 12:00 PM · MID-SESSION




MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

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VN-INDEX 

1,830.47 +1.34%

CHANGE +24.27 pts

GTGD 14,167.5 VND bn | -3,003.9 VND bn (-17.49%)

Advancers 97 **Unchanged** 60 **Decliners** 205


VN30 

1,967.22 +0.51%

CHANGE +10.05 pts

GTGD 8,213.6 VND bn | -1,648.5 VND bn (-16.72%)

Advancers 11 **Unchanged** 1 **Decliners** 18

HNX-INDEX 

336.16 +1.8%

CHANGE +5.96 pts

GTGD 793.3 VND bn | -158.4 VND bn (-16.64%)

Advancers **Unchanged** **Decliners**

MARKET RECAP

VN-Index staged a constructive session, maintaining gains throughout the day after an impressive gap-up open and closing at 1,830.47 points, up more than 24 points, as sustained demand kept the index near the session high. The recovery was led mainly by Vingroup-related names and a breakout in oil & gas stocks. However, market breadth remained weak with 205 decliners, while ports, steel, construction and aviation came under correction pressure. Notably, liquidity fell sharply, reflecting broad caution, while foreign investors continued to weigh on the index with net selling of VND 1,816bn, concentrated in large caps such as FPT, VHM and TCB. This points to deep money-flow divergence even as the headline index stayed positive.

MARKET VIEW

Technically, VN-Index is sending a neutral signal after closing at 1,830 points, between MA10 and MA20, while RSI(14) held around 50, indicating a tug-of-war and balance between supply and demand. Although the green spinning-top candle, with the close near the session high, suggests buyers had a slight edge, weaker money flow (MFI at 33) means the market still lacks clear breakout momentum. We expect a narrow-range trading scenario to continue at the start of the next session, pending confirmation at resistance of 1,850–1,860 or support of 1,830–1,840. In this context, short-term investors should maintain a medium equity weighting, avoid chasing rallies and trade by zones, while focusing on stocks with specific themes such as state divestment, market-upgrade prospects, economic-development resolutions or the offshore oil & gas cycle. Medium- and long-term investors may continue to accumulate gradually on pullbacks toward support, prioritizing fundamentally sound and liquid names in banks, securities, retail, public investment and oil & gas.

FOREIGN FLOW SPOTLIGHT

 Net-buy sessions 1/6

FOREIGN NET BUYING/SELLING OVER SIX SESSIONS

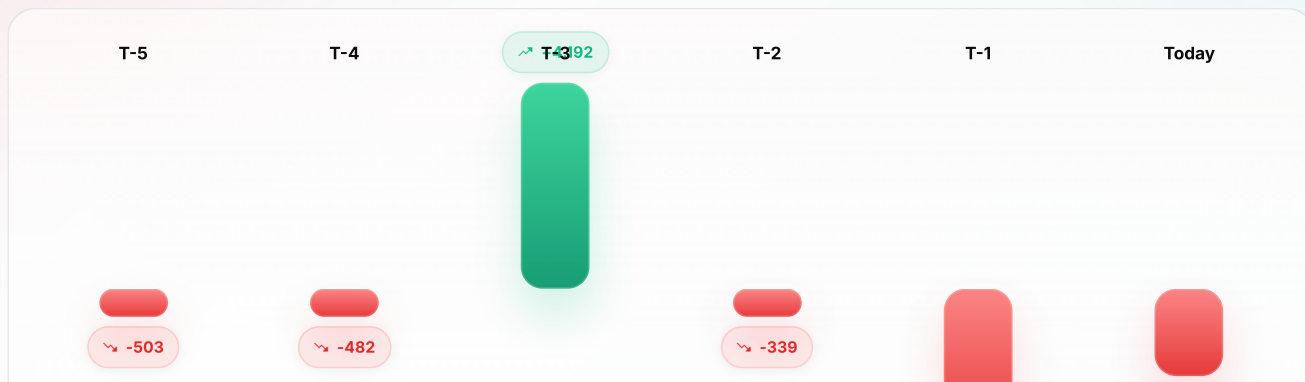
 Today -1.809

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

Six-session cumulative net selling **-2.069**

Largest swing **+4.192**

Reversal session **T-3**



-1.809

-3.128

Source: Algo, ASEANSC compiled

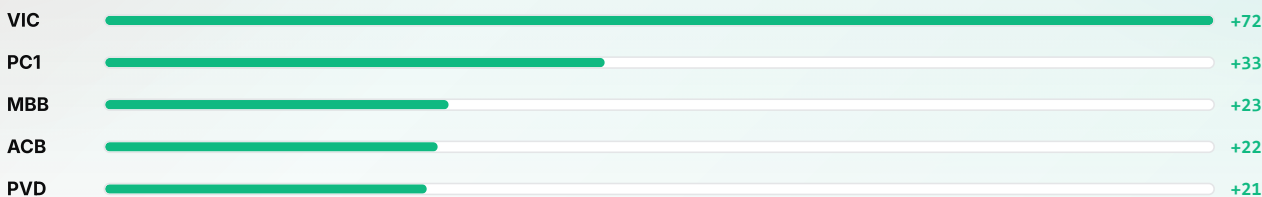
Key takeaway: foreign investors posted cumulative net selling of VND 2,069bn over six sessions, with net selling in 5 of 6 sessions.

FLOW LEADERS

TOP FOREIGN-FLOW NAMES

Top 5 notable 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, trend view and key data points for the day.

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INDEX RECAP

VN-INDEX

1,830.47

+1.34%

CHANGE

+24.27 pts

GTGD

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Unchanged

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Decliners

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Decliners

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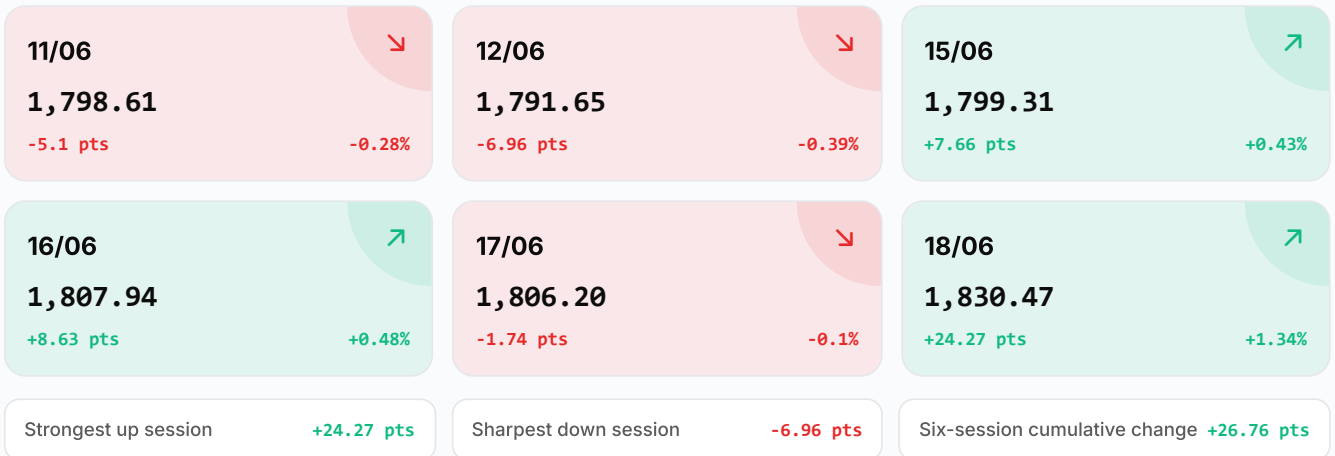
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VN-INDEX MOVEMENT OVER THE LAST SIX SESSIONS

Each tile represents one recent session | Displays closing level and change versus the prior session

● ADVANCERS ● DECLINERS ● FLAT



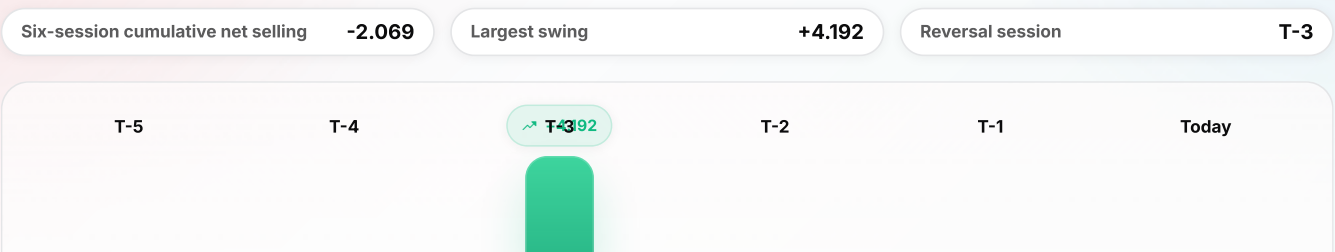
FOREIGN FLOW SPOTLIGHT

↑ Net-buy sessions 1/6

FOREIGN NET BUYING/SELLING OVER SIX SESSIONS

↓ Today -1.809

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





Source: Algo, ASEANSC compiled

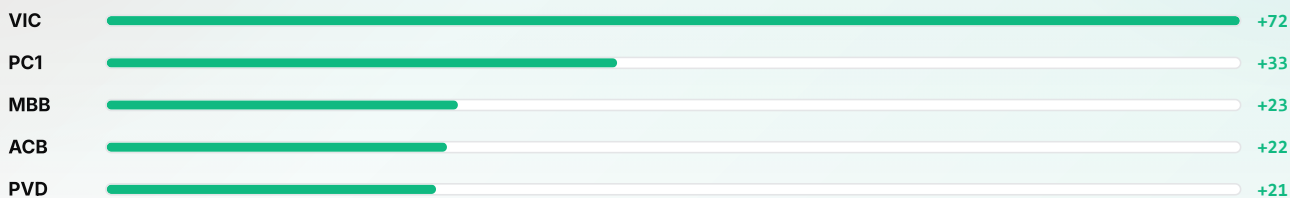
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MONEY FLOW · HEATMAP

DOMESTIC AND FOREIGN MONEY-FLOW HEATMAP



TIME FRAME
12/06/2026 - 18/06/2026 (1 week)

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Aggregates domestic and foreign money-flow preference across key investment themes over a one-week observation window.

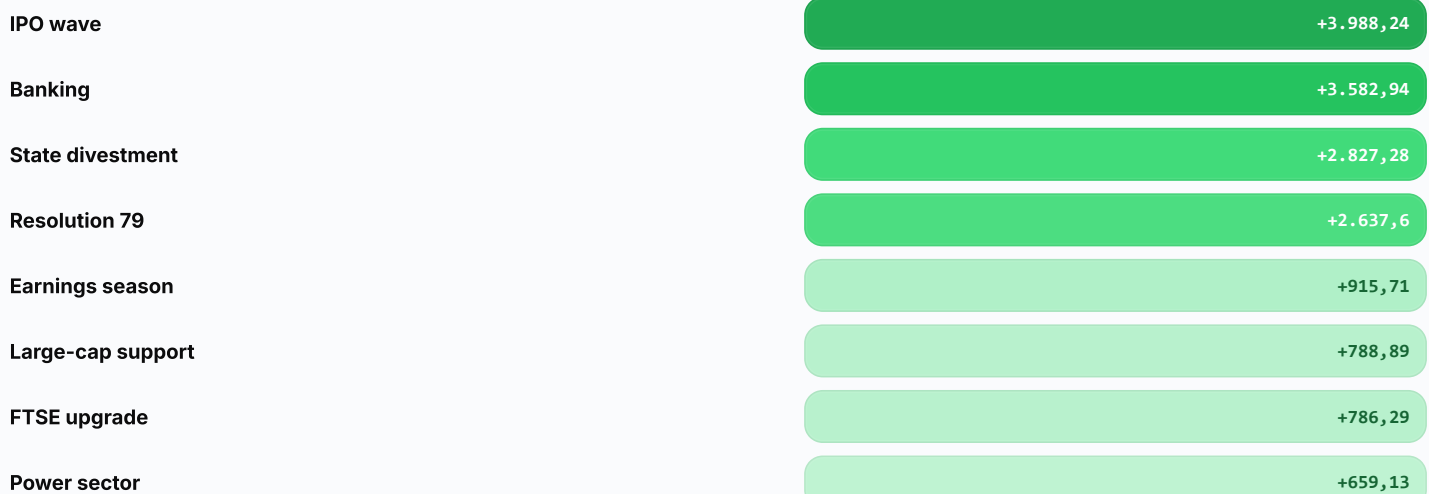
Foreign-flow heatmap

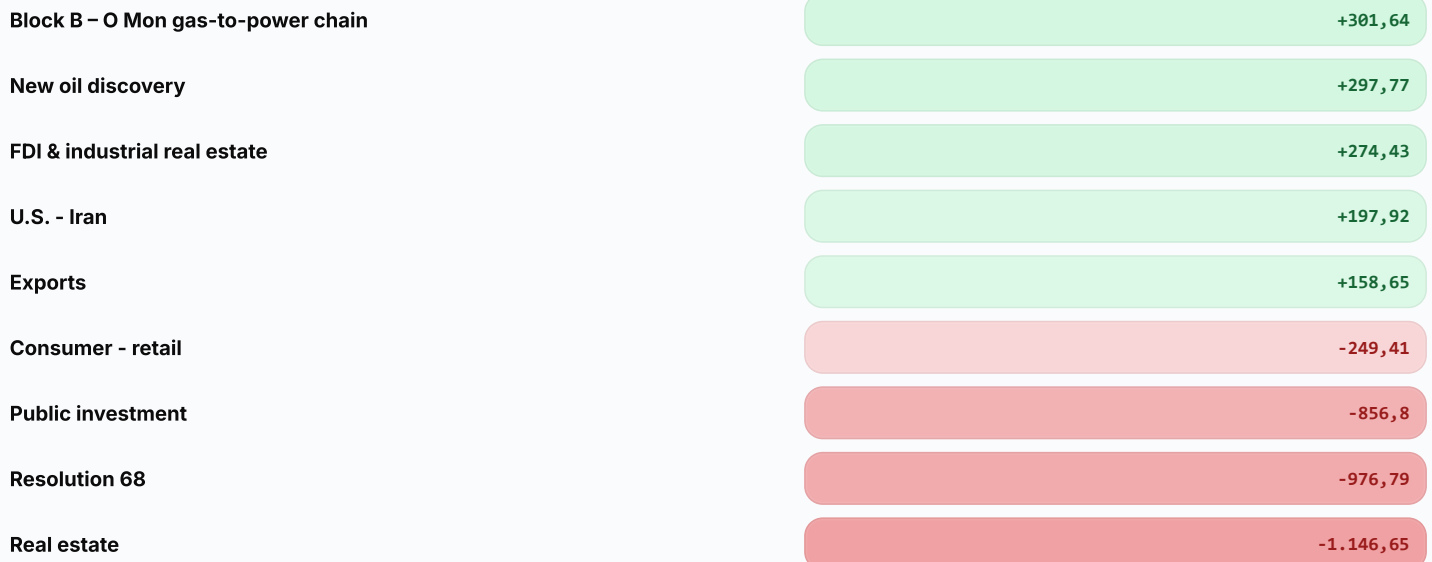
📅 1 WEEK



Domestic-flow heatmap

📅 1 WEEK



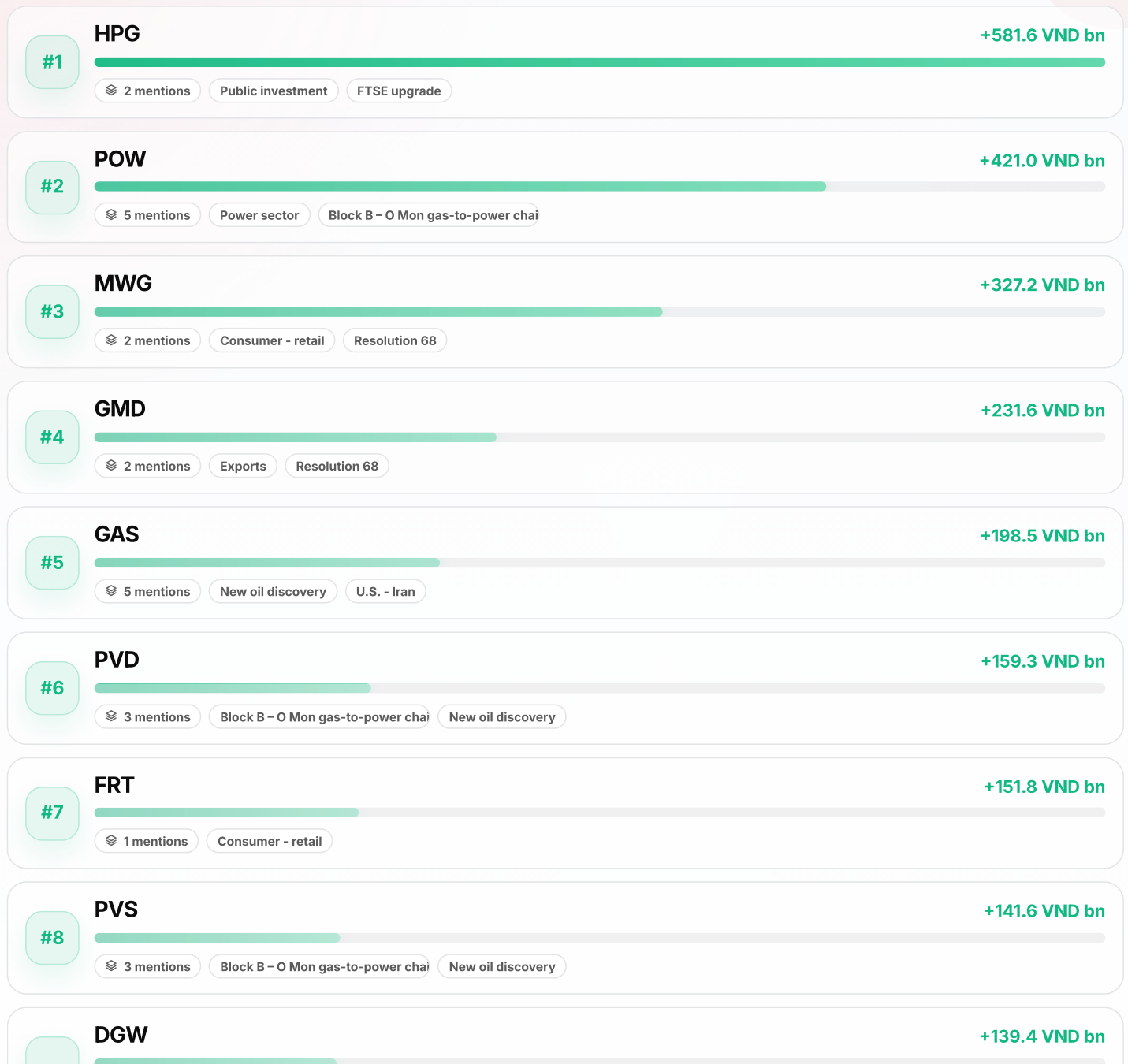


Strong negative  Strong positive

Top foreign-flow stocks

TICKER RANKING

Ranked by ticker using cumulative values appearing in TOP_BUY clusters from the foreign-flow sheet.



#9

2 mentions

Consumer - retail

Resolution 68

SSI

+112.8 VND bn

#10

2 mentions

IPO wave

FTSE upgrade

Top domestic-flow stocks

TICKER RANKING

Ranked by ticker using cumulative values appearing in TOP_BUY clusters from the domestic-flow sheet.

CTG

+4,578.5 VND bn

#1

5 mentions

Banking

State divestment

VCB

+3,122.8 VND bn

#2

4 mentions

State divestment

Resolution 79

VPB

+2,820.2 VND bn

#3

2 mentions

Banking

Resolution 68

SSI

+1,865.8 VND bn

#4

2 mentions

IPO wave

FTSE upgrade

GEX

+1,775.0 VND bn

#5

2 mentions

FTSE upgrade

Resolution 68

POW

+1,483.6 VND bn

#6

4 mentions

State divestment

Resolution 79

MBB

+1,339.9 VND bn

#7

1 mentions

Banking

TCB

+1,163.0 VND bn

#8

2 mentions

Large-cap support

Resolution 68

VIX

+1,008.1 VND bn

#9

1 mentions

IPO wave

SHS

+756.9 VND bn

#10

1 mentions

IPO wave

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