08:00 AM · PRE-MARKET

MORNING BRIEF

A roundup of macro developments and key signals before the trading session.

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GLOBAL STOCK INDICES

Index	Level	+/- (%)
DJI	51,594.14	-1153.18 (-2.19%)
IXIC	24,442.94	-433.97 (-1.74%)
GSPC	7,316.15	-112.63 (-1.52%)
FTSE	10,952.77	+44.36 (0.41%)
GDAXI	25,405.82	-54.66 (-0.21%)
FCHI	8,461.55	+53.28 (0.63%)

Sources: Investing.com, Vietstock, ASEANSC compilation

ASEAN DIGITAL SECURITIES VIDEOS

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INTERNATIONAL NEWS

Beyond Hormuz: global maritime chokepoints enter a new era of instability — The Strait of Hormuz is drawing global attention as U.S.–Iran tensions threaten global oil flows. However, experts say the strait...

INTERNATIONAL NEWS | Updated at 15:26:51 · 30/07/2026

As home ownership drifts out of reach, equities become a path to wealth creation — From East to West, the gap between wages and home prices has widened to the point where young people no longer trust the traditional savings route. This state...

INTERNATIONAL NEWS | Updated at 15:26:51 · 30/07/2026

China's economy starts its five-year plan with new growth drivers — Growth in 1H2026 was consistent with the annual target of around 4.5–5.0%, putting China among the major economies with...

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Five key takeaways from the Fed meeting — The Fed kept interest rates unchanged as expected at its July meeting, but what happened after the decision drew even more attention. Three...

INTERNATIONAL NEWS | Updated at 15:26:51 · 30/07/2026

Global gold rises 2% after the Fed leaves rates unchanged — Gold prices reversed course and rose nearly 2% in the July 29 session after the U.S. Federal Reserve decided to hold interest rates steady. The U.S. dollar and yields...

INTERNATIONAL NEWS | Updated at 15:26:51 · 30/07/2026

Brent crude returns above USD90/bbl — Global oil prices surged in the July 29 session after President Donald Trump said the U.S. would respond forcefully to Iran following the attack...

INTERNATIONAL NEWS | Updated at 15:26:51 · 30/07/2026

Dow Jones loses more than 1,150 pts on concerns the Fed is behind the curve in fighting inflation — U.S. equities fell sharply across the board on July 29 as Treasury yields surged after the Fed's decision to hold rates steady...

INTERNATIONAL NEWS | Updated at 15:26:51 · 30/07/2026

Oil & gas majors expected to deliver strong profits — Six global oil & gas majors — BP, Chevron, Eni, ExxonMobil, Shell and TotalEnergies — could generate combined net profit of around USD45bn...

INTERNATIONAL NEWS | Updated at 15:26:51 · 30/07/2026

DOMESTIC NEWS

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Urgent construction underway for packages under component projects 1 and 2 of the Ninh Thuan nuclear power plant

ECONOMY - INVESTMENT | 18 minutes ago

SEMI SEA wants to partner with and support Vietnam in realising its semiconductor industry development vision

ECONOMY - INVESTMENT | 23 minutes ago

The North–South route cannot be labelled an expressway while operating like a national highway

NEWS | Today

International Financial Centre: Is Vietnam trying to attract capital or transform its growth model?

NEWS | Today

Additional U.S. tariffs: How are textile and garment companies affected?

NEWS | Today

Durian case: A billion-dollar 'passport' and regulatory gaps

NEWS | Today

CORPORATE NEWS

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Mobile World posts record 2Q profit of VND3.3tn, doubling YoY — Mobile World Investment Corporation (HOSE: MWG) released its 2Q2026 consolidated financial statements, with net profit reaching VND3.3tn, twice the level of the same period last year...

CORPORATE NEWS | Updated at 15:26:51 · 30/07/2026

Dabaco's 2Q net profit falls 43% on lower hog prices — Dabaco Group (HOSE: DBC) ended 2Q2026 with net profit down sharply by 43% YoY, mainly due to lower live hog prices. This was also...

CORPORATE NEWS | Updated at 15:26:51 · 30/07/2026

Hai Phong Port reports 2Q profit growth of more than 120% — Hai Phong Port JSC (UPCoM: PHP) released its 2Q2026 consolidated financial statements, with net revenue of nearly VND950bn, up 44%, while net profit reached VND425bn...

CORPORATE NEWS | Updated at 15:26:51 · 30/07/2026

DPM inaugurates 55-tonne/hour fertiliser conveyor system — On July 29, 2026, PetroVietnam Fertilizer and Chemicals Corporation (PVFCCo-Phu My, HOSE: DPM) inaugurated and put into operation its conveyor system...

CORPORATE NEWS | Updated at 15:26:51 · 30/07/2026

Wave of large-scale M&A deals in the AI era — The global M&A market is seeing an increasingly clear shift toward large-scale transactions as artificial intelligence (AI) reshapes...

CORPORATE NEWS | Updated at 15:26:51 · 30/07/2026

CC1 AGM: Chairman confident in USD1bn revenue target; former TTC Land and Novaland executives join the BOD — CC1's management is confident in entering a new growth cycle toward revenue of more than USD1bn by 2031, supported by a VND42.5tn backlog...

CORPORATE NEWS | Updated at 15:26:51 · 30/07/2026

EVENT CALENDAR

Upcoming corporate and macro events

09/2026 **14**
BTW
Cash dividend of VND900/share
Dividend

08/2026 **21**
DDH
Cash dividend of VND415/share
Dividend

08/2026 **14**
VNR
Cash dividend of VND1,000/share
Dividend

08/2026 **28**
HGM
Cash dividend of VND5,000/share
Dividend

08/2026 **20**
SAC
Cash dividend of VND1,000/share
Dividend

08/2026 **26**
BBS
Cash dividend of VND1,000/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	
1,744.66	+2.35%
CHANGE	+39.98 pts
GTGD	VND16,663.3bn | +VND4,861.7bn (+41.2%)
Gainers 277 · Unchanged 33 · Decliners 58	

VN30	
1,886.27	+2.01%
CHANGE	+37.15 pts
GTGD	VND9,853.8bn | +VND1,839.3bn (+22.95%)
Gainers 28 · Unchanged 1 · Decliners 1	

HNX-INDEX	
275.05	+1.24%
CHANGE	+3.37 pts
GTGD	VND877.1bn | +VND399.1bn (+83.48%)
Gainers · Unchanged · Decliners	

MARKET MOVEMENT

VN-Index staged an impressive breakout, sustaining gains throughout the session and closing at the intraday high of 1,284.09 pts, up 39.98 pts, confirming that demand was firmly in control. Green breadth broadened sharply, with 277 gainers on HOSE, while the VN30 basket showed strong consensus as 28/30 constituents advanced and acted as the key pillar for the recovery. Liquidity improved markedly, while foreign investors' net buying of VND564bn, concentrated in large-cap names such as VIC, VNM and MSN, further reinforced market confidence. Broad-based gains across high-beta sectors such as securities, real estate, construction and seaports created sustainable upward momentum, fully offsetting pressure from the few laggards and bringing investor sentiment back to an upbeat state after the consolidation phase.

MARKET VIEW

VN-Index is sending a neutral recovery signal after closing at 1,745 pts with a long bullish candle, indicating that buyers temporarily have the upper hand, although price momentum and money flow (MFI 26) have yet to show sufficient confirmation for a sustainable uptrend. With the index trapped between the MA10 and MA20 and RSI at 46, the market will likely remain range-bound in early trading tomorrow before a clearer direction forms toward the end of the day. Against this backdrop, the optimal strategy is to maintain a moderate portfolio weighting, avoid chasing rebounds, and focus on short-term trades around the 1,740–1,750 support zone and 1,760–1,770 resistance zone, with priority given to stocks with idiosyncratic catalysts such as SOE divestment, the market-upgrade story, economic-development resolutions, or the offshore oil & gas cycle. For medium- and long-term investors, pullbacks toward medium-term support remain opportunities for gradual accumulation in fundamentally sound and liquid sectors such as banks, securities, retail, public investment and oil & gas.

FOREIGN FLOW SPOTLIGHT

FOREIGN NET FLOW OVER SIX SESSIONS

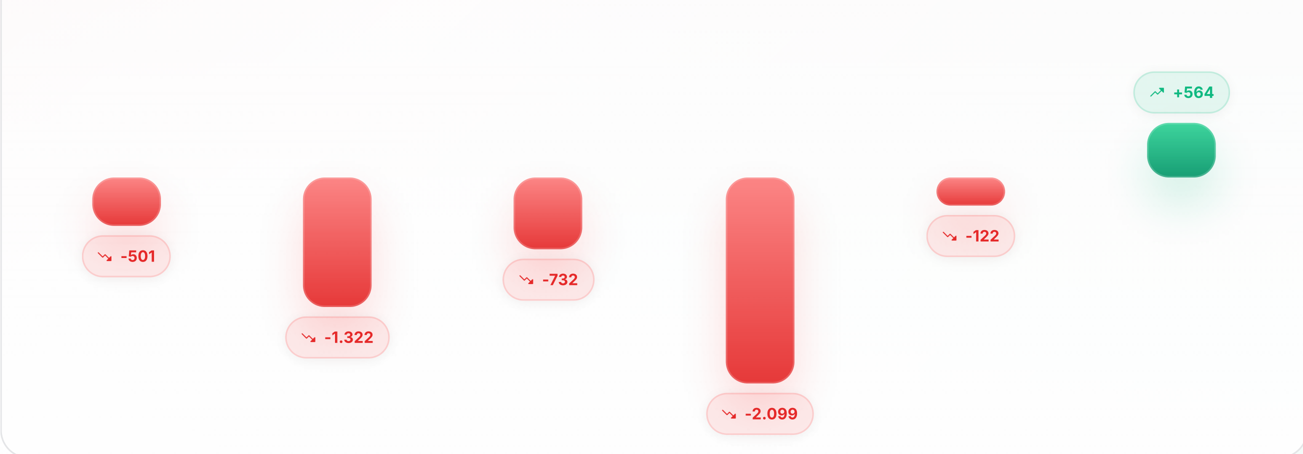
Net-buying sessions 1/6

Today +564

Unit: VNDbn · Green bars indicate net buying, red bars indicate net selling · The midline marks breakeven.

6-session cumulative net selling	Largest swing	Reversal session
-4.212	-2.099	Today

T-5 T-4 T-3 T-2 T-1 Today



Source: Algo, ASEANSC compilation

Key takeaway: Foreign investors recorded cumulative net selling of VND4,212bn over the past six sessions, with net selling in 5/6 sessions.

FLOW LEADERS

TOP FOREIGN TRADES

Top five notable net-bought and net-sold stocks in the session.

TOP 5 NET BOUGHT

VIC	+193
VNM	+157
MSN	+105
FPT	+75
GMD	+72

TOP 5 NET SOLD

TCB	-144
ACB	-63
NVL	-47
GEX	-34
VIX	-33

15:30 PM · MARKET CLOSE

MARKET CLOSE

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Session recap, trend view and key market data for the day.

INDEX SUMMARY

VN-INDEX	1,744.66	+2.35%	CHANGE +39.98 pts
VN30	1,886.27	+2.01%	CHANGE +37.15 pts
HNX-INDEX	275.05	+1.24%	CHANGE +3.37 pts

GTGD	VND16,663.3bn | +VND4,861.7bn (+41.2%)
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Gainers	Unchanged	Decliners

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VN-INDEX PERFORMANCE OVER THE LAST 6 SESSIONS

Each tile represents one recent session | Displays the close and change versus the previous session

ADVANCERS DECLINERS SIDEWAYS

Date	Close	Change (pts)	Change (%)
23/07	1,699.38	+30.85 pts	+1.85%
24/07	1,686.11	-13.27 pts	-0.78%
27/07	1,669.01	-17.1 pts	-1.01%
28/07	1,680.62	+11.61 pts	+0.7%
29/07	1,704.68	+24.06 pts	+1.43%
30/07	1,744.66	+39.98 pts	+2.35%

Strongest up session	+39.98 pts
Sharpest down session	-17.10 pts
6-session cumulative	+76.13 pts

FOREIGN FLOW SPOTLIGHT

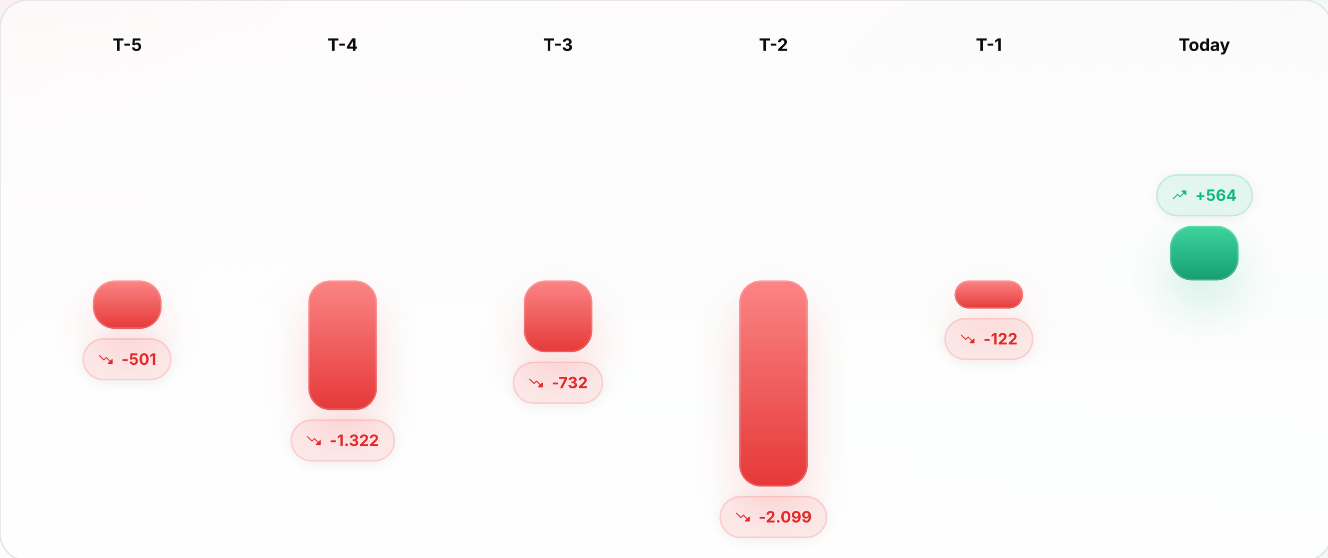
FOREIGN NET FLOW OVER SIX SESSIONS

Net-buying sessions 1/6

Today +564

Unit: VNDbn · Green bars indicate net buying, red bars indicate net selling · The midline marks breakeven.

6-session cumulative net selling	-4.212
Largest swing	-2.099
Reversal session	Today



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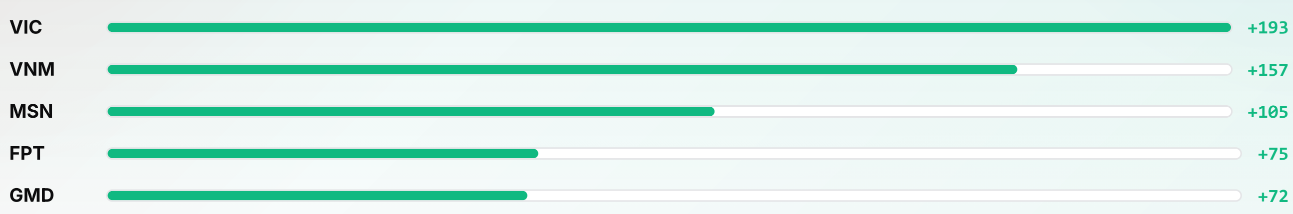
FLOW LEADERS

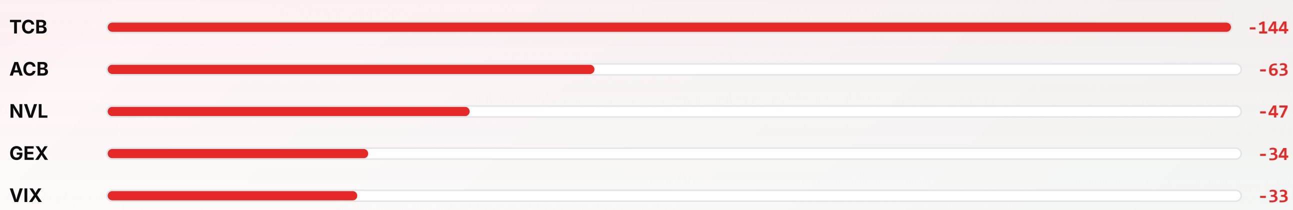
TOP FOREIGN TRADES

Top five notable net-bought and net-sold stocks in the session.

TOP 5 NET BOUGHT



TOP 5 NET SOLD



MONEY FLOW · HEATMAP

DOMESTIC & FOREIGN FLOW HEATMAP

A summary of domestic and foreign money-flow priorities across key investment themes over a 1-week observation window.

TIME FRAME
July 24, 2026 – July 30, 2026 (1 week)

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Foreign Flow Heatmap

1 WEEK

Public Investment	+482.55
Consumer & retail	+392.36
New oil discoveries	+94.8
Resolution 79	+94.5
Xuất khẩu	+87.77
SOE divestment	+86.07
US–Iran	+84.88
Earnings Season	+37.1
Block B–O Mon Gas-to-Power Chain	-6
Power Sector	-27.76
FDI & Industrial Real Estate	-70.43
IPO Wave	-543.33
Banking	-945.17
FTSE Upgrade	-2,637.82
Large-cap support	-2,871.17
Real Estate	-3,289.5
Resolution 68	-4,100.18

Domestic Flow Heatmap

1 WEEK

FTSE Upgrade	+10,684.85
Large-cap Support	+9,093.01
Resolution 68	+6,331.28
Real Estate	+5,795.7
IPO Wave	+3,193.83

SOE divestment	+2,178.12
Resolution 79	+2,146.42
Banks	+1,883.79
Public Investment	+1,199.74
US–Iran	+948.82
New Oil Discovery	+868.62
Block B–O Mon Gas-to-Power Chain	+562.7
Consumer & retail	+549.12
Power Sector	+411.47
Earnings season	+307.15
FDI & industrial parks	+202.03
Exports	+168.84

Strong negative — Strong positive

DISCLAIMER

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