

08:00 AM · PRE-MARKET



# MORNING BRIEF

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

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## U.S. EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	52,900.07	+594.83 (1.14%)
S&P 500 derived	7,483.24	+0.01 (0%)
Nasdaq	25,832.67	-207.36 (-0.8%)
Small Cap 2000 derived	2,996.11	-16.48 (-0.55%)
S&P 500 VIX derived	16.34	+0.53 (3.35%)
S&P/TSX	35,274.84	+308.17 (0.88%)

Sources: Investing.com, Vietstock, ASEANSC compilation

## ASEAN DIGITAL SECURITIES VIDEOS

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## INTERNATIONAL NEWS



**Why India could halt sugar exports** — India's accelerated expansion of ethanol production is reshaping one of the world's largest sugar industries. Sugar mills are increasing investment...

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026



**Wall Street banks score big in China** — The China securities units of several leading Wall Street investment banks posted record-high profits in 2025, supported by business activity...

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026



**Ship traffic through the Strait of Hormuz quadruples** — The number of vessels passing through this shipping lane quadrupled over the past week as oil tankers cautiously returned.

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026



**US dollar near two-week low as Fed rate-hike expectations cool** — The US dollar stabilized near a two-week low in the July 06 session as investors pared back expectations that the US Federal Reserve (Fed)...

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026



**OPEC+ raises output again** — OPEC+ agreed to continue raising production quotas from August, according to a statement released by the group on July 05. The decision will add more supply...

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026



**Artificial intelligence: AI advantage lies in hard-to-replicate technologies** — Israeli founders are able to bring still-evolving technologies into real-world applications, thereby creating advantages in foundational technology layers...

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026



**Japan uses ODA to help countries combat copyright infringement** — Japan's Ministry of Foreign Affairs aims to support copyright legislation and training in other countries to prevent the distribution of counterfeit products, especially for...

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026




**Memory crunch: When AI consumes the world's RAM** — A half-joking line has been circulating across technology and finance forums: "USD499 for an M5 chip, and USD8mn for the..."

**INTERNATIONAL NEWS**

Updated at 16:19:04 · 06/07/2026

## DOMESTIC NEWS

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**From airports and seaports to data centers: Do not let local ambitions obscure national advantages**

**MACRO** | 1 hour ago



**Resolution No. 10-NQ/TW: Repositioning the role of FDI in the new development strategy**

**ECONOMY - INVESTMENT** | 2 hours ago



**Vietnamese businesses struggle with the logistics-cost equation**

**ECONOMY - INVESTMENT** | 4 hours ago



**Specialized plastic-recycling industrial park: Attractive model, but foundations remain lacking**

**NEWS** | Today



**Vietnam completes FTA negotiations with four European countries**

**NEWS** | Today



**M&A in Vietnam's energy sector accelerates**

**NEWS** | Today



**Nguyen Duc Chi explains connection with the company issuing Crystal Bay travel cards —** Nguyen Duc Chi, Chairman of Crystal Bay Tourism Group, affirmed that the Crystal Bay Travel Card is a long-term resort product, not a...

**CORPORATE NEWS** | Updated at 16:19:04 · 06/07/2026



**Hoang Huy Green River: Opportunity to capture early capital flows at the heart of Thuy Nguyen —** The shift of Hai Phong's development center to the north of the Cam River is creating notable changes in the Thuy Nguyen real estate market...

**CORPORATE NEWS** | Updated at 16:19:04 · 06/07/2026



**Senior management changes; Thanh Hoa environmental company postpones AGM for the second time —** Thanh Hoa Urban Environment and Works JSC (UPCoM: THU) announced the cancellation of its shareholder-record date and postponement of its 2026 AGM. Previously...

**CORPORATE NEWS** | Updated at 16:19:04 · 06/07/2026



**LHC completes capital increase to VND288bn —** Lam Dong Irrigation Investment and Construction JSC (HNX: LHC) announced the successful issuance of 14.4mn bonus shares to increase share capital from owners' equity...

**CORPORATE NEWS** | Updated at 16:19:04 · 06/07/2026



**PNJ denies involvement in case involving 28,000 smuggled diamonds —** PNJ management affirmed that P-Lab is not licensed to trade diamonds, that PNJ has no diamond transactions with P-Lab, and that the imported diamonds...

**CORPORATE NEWS** | Updated at 16:19:04 · 06/07/2026



**F88 opens registration for public offering from July 06, 2026 —** F88 Investment JSC (UPCoM: F88) officially opened subscription registration for its public offering (PO) from July 06, 2026, at VND71,000/share. The...

**CORPORATE NEWS** | Updated at 16:19:04 · 06/07/2026



## EVENT CALENDAR

Upcoming corporate and macro events

08/2026

**31**

**LKW**

Cash dividend of VND3,000/share

Dividend

07/2026

**30**

**SGH**

Cash dividend of VND1,100/share

Dividend

07/2026

**31**

**BDG**

Cash dividend of VND5,000/share

Dividend

08/2026

**05**

**C32**

Cash dividend of VND300/share

Dividend

07/2026

**31**

**TLG**

Cash dividend of VND1,000/share

Dividend

08/2026

**14**

**VCG**

Cash dividend of VND800/share

Dividend



# MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

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**VN-INDEX** ↘

**1,843.50** -1%

CHANGE -18.58 pts

TURNOVER VND18,269.2bn | +VND4,289.8bn (+30.69%)

Advancers

58

Unchanged

48

Decliners

267

**VN30** ↘

**1,991.11** -0.57%

CHANGE -11.45 pts

TURNOVER VND9,859.2bn | +VND2,464.5bn (+33.33%)

Advancers

6

Unchanged

2

Decliners

22

**HNX-INDEX** ↘

**296.51** -3.6%

CHANGE -11.06 pts

TURNOVER VND1,246.3bn | -VND320.5bn (-20.46%)

Advancers

Unchanged

Decliners

## MARKET RECAP

VN-Index closed down nearly 19 pts as selling pressure continued to intensify from the start of the afternoon session, negating the morning recovery attempt and pushing the index to close at the day's low. The sell-off broadened, with 267 decliners overwhelming advancers on the HOSE, while the VN30 also weakened with 22/30 constituents closing lower, particularly across leading sectors such as Securities, Oil & Gas, Power and Fertilizers & Chemicals. Downside pressure was compounded by sustained heavy foreign net selling of VND2,330bn, concentrated in large-cap names such as VIC, SHB and MSN. The only bright spot was a clear improvement in liquidity versus the previous session, suggesting that cash flow has started to re-enter the market more actively, although divergence remains evident as several idiosyncratic sectors still managed to stay in the green and provide partial support.

## OUR VIEW

VN-Index is sending a neutral signal after closing at 1,844 pts, positioned between MA20 and MA10 while RSI and MFI both hover around 48–49, reflecting a range-bound market that lacks clear breakout momentum. Although selling pressure dominated the session as the index closed at the day's low, the sell-off was not yet strong enough to confirm a deeper downtrend, indicating that the market is still receiving some support from key technical levels. Under a base case of choppy trading within a narrow 1,840–1,850 range before a clearer trend is established, short-term investors should maintain equity exposure at a moderate level, avoid chasing rebounds and trade within the 1,840–1,870 range, while prioritizing stocks with idiosyncratic catalysts such as State divestments, the market-upgrade roadmap, economic-development resolutions or the offshore oil & gas cycle. Meanwhile, medium- to long-term investors may use pullbacks toward support zones to accumulate fundamentally sound, liquid names in Banks, Securities, Retail, Public Investment and Oil & Gas.

## FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

### FOREIGN NET BUY/SELL OVER 6 SESSIONS

Today -2.330

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

6-session cumulative net selling **-5.289**

Widest swing **-2.330**

Reversal session **T-3**

T-5

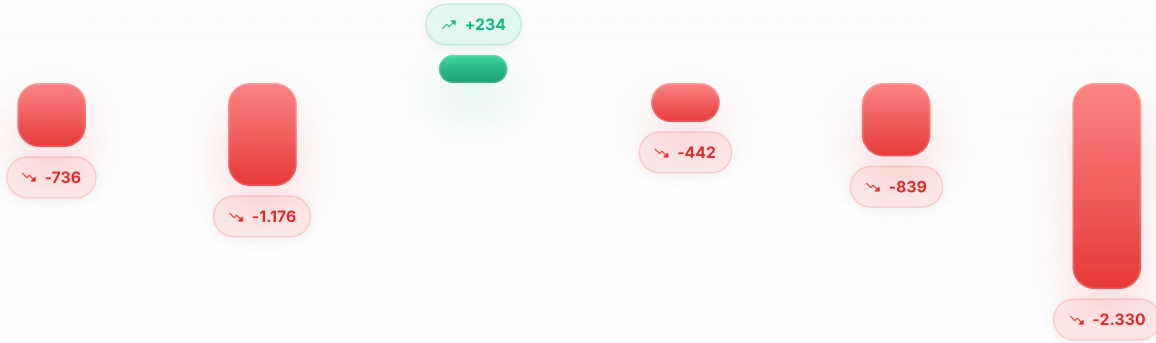
T-4

T-3

T-2

T-1

Today



Source: Algo, ASEANSC compilation

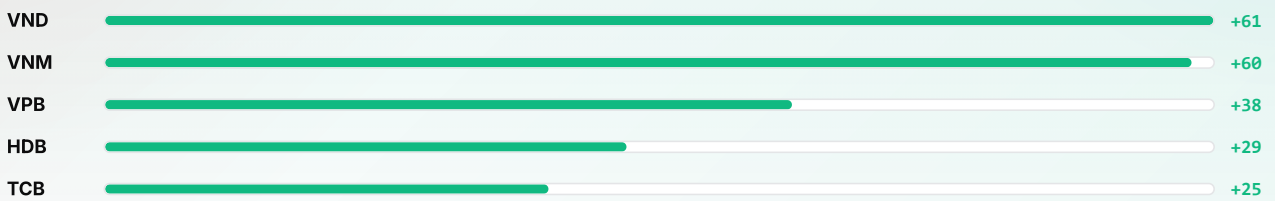
Key takeaway: Foreign investors recorded cumulative net selling of VND5,289bn over six sessions, with net selling in 5 of the 6 sessions.

**FLOW LEADERS**

**TOP FOREIGN TRADING**

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

**TOP 5 NET BOUGHT**



**TOP 5 NET SOLD**



15:30 PM · MARKET CLOSE



**MARKET CLOSE**

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

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**INDEX SUMMARY**

**VN-INDEX**  
**1,843.50**  
 CHANGE -18.58 pts

**VN30**  
**1,991.11**  
 CHANGE -11.45 pts

**HNX-INDEX**  
**296.51**  
 CHANGE -11.06 pts

TURNOVER VND18,269.2bn | +VND4,289.8bn (+30.69%)

Advancers  
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Unchanged  
48

Decliners  
267

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Advancers

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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

29/06

1,854.97

-16.94 pts

-0.9%

30/06

1,860.01

+5.04 pts

+0.27%

01/07

1,867.21

+7.2 pts

+0.39%

02/07

1,866.35

-0.86 pts

-0.05%

03/07

1,862.08

-4.27 pts

-0.23%

06/07

1,843.50

-18.58 pts

-1%

Strongest up session

+7.20 pts

Sharpest down session

-18.58 pts

6-session cumulative

-28.41 pts

## FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

## FOREIGN NET BUY/SELL OVER 6 SESSIONS

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

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6-session cumulative net selling -5.289    Widest swing -2.330    Reversal session T-3



Source: Algo, ASEANSC compilation

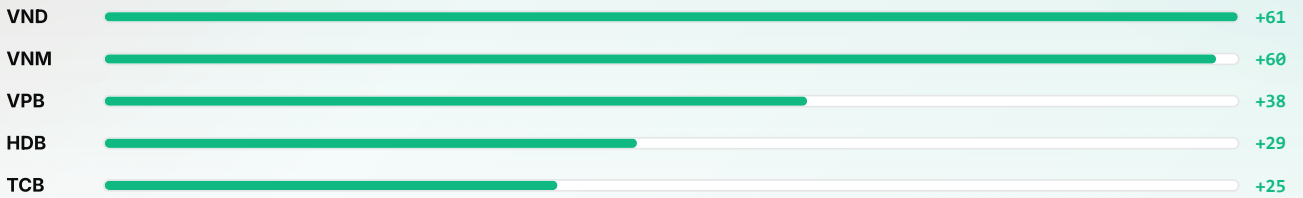
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FLOW LEADERS

TOP FOREIGN TRADING

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TOP 5 NET BOUGHT



TOP 5 NET SOLD





# 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

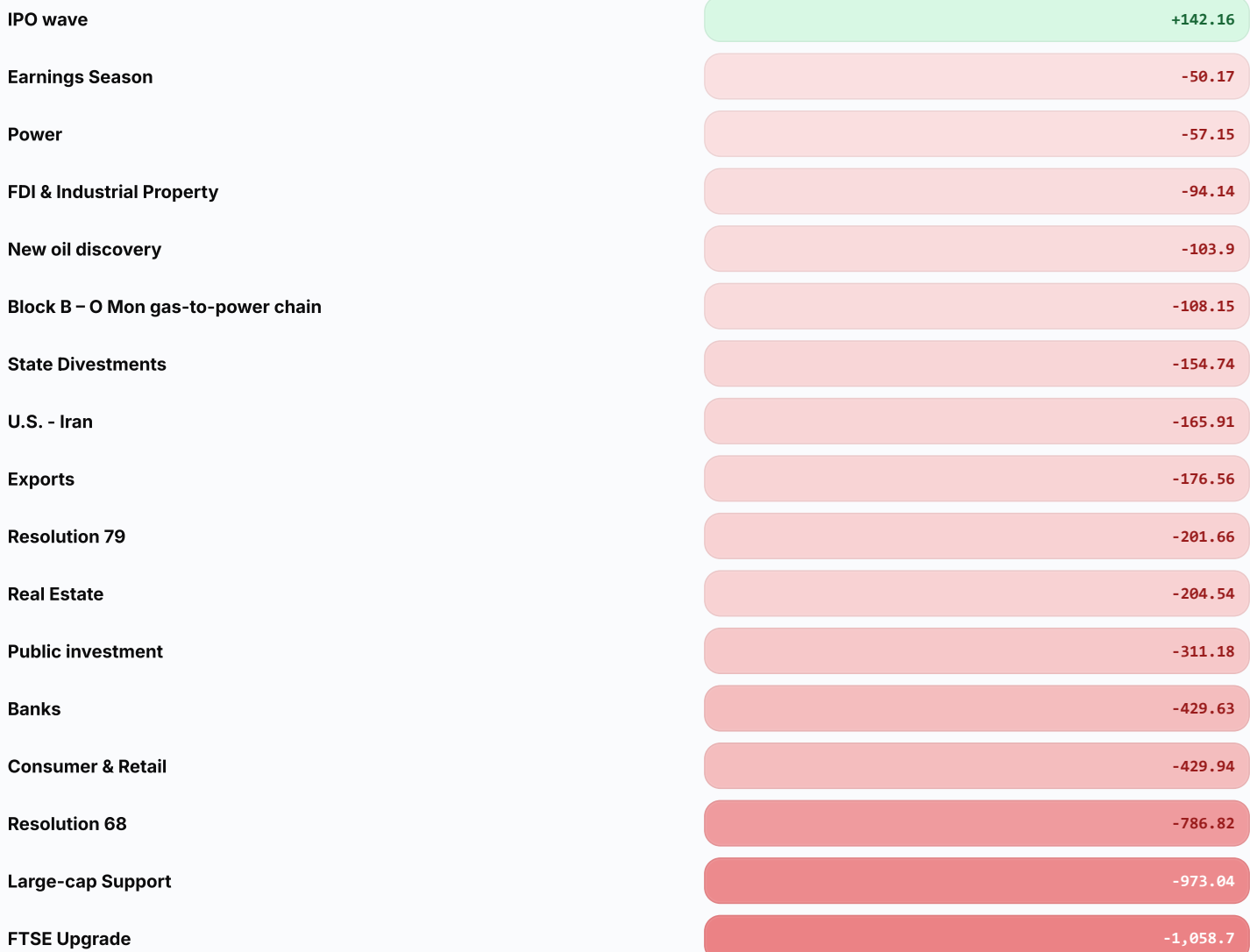
30/06/2026 – 06/07/2026 (1 week)

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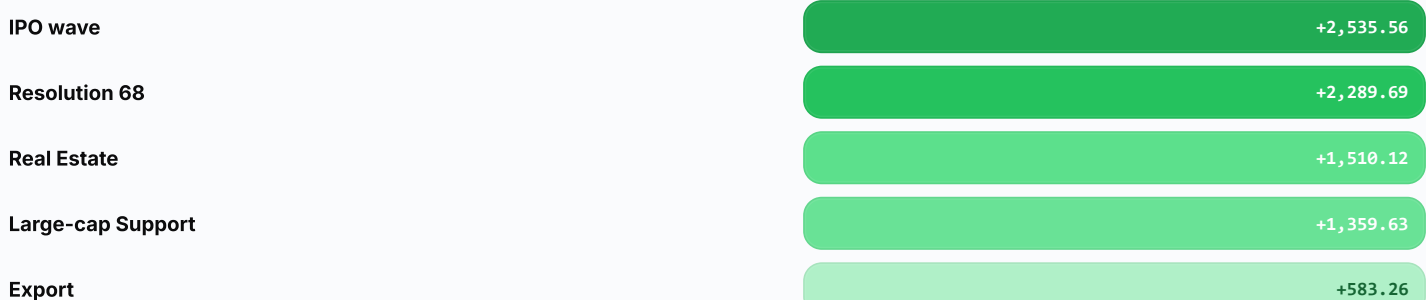
## Foreign Flow Heatmap

🕒 1 WEEK



## Domestic Flow Heatmap

🕒 1 WEEK



Banks	+403.53
Earnings Season	+107.36
FTSE Upgrade	-193.16
FDI & Industrial Property	-194.35
Power	-711.61
New Oil Discovery	-998.32
Block B-O Mon Gas-to-Power Chain	-1,068.87
US-Iran	-1,099.07
Consumer & Retail	-1,360.28
Public Investment	-1,497.44
State divestment	-1,593.68
Resolution 79	-1,639.58


Strong negative  Strong positive

## Top Foreign Flow

 LOGIN REQUIRED

Logged-out view shows only the ranking of 10 stocks. Log in to ASC to view detailed tickers and open the price board.

#1#2#3#4#5

#6#7#9#10

**Log in to view top stocks attracting foreign flow**

The detailed stock list is hidden for visitors who have not logged in to an ASC account.


[→ Log in](#)

## Top Domestic Flow

 LOGIN REQUIRED

Logged-out view shows only the ranking of 10 stocks. Log in to ASC to view detailed tickers and open the price board.

#1#2#3#4#5

#6#7#9#10

**Log in to view top stocks attracting domestic flow**

The detailed stock list is hidden for visitors who have not logged in to an ASC account.

[→ Log in](#)

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