

08:00 AM · PRE-MARKET



MORNING BRIEF

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

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Research Center

U.S. EQUITY INDICES

Index	Level	+/- (%)
Dow Jones	52,925.15	-130.76 (-0.25%)
S&P 500 derived	7,503.85	-33.58 (-0.45%)
Nasdaq	25,818.69	-302.47 (-1.16%)
Small Cap 2000 derived	2,982.49	-27.05 (-0.9%)
S&P 500 VIX derived	16.53	+0.4 (2.48%)
S&P/TSX	35,272.59	+60.27 (0.17%)

Sources: Investing.com, Vietstock, ASEANSC compilation

ASEAN DIGITAL SECURITIES VIDEOS

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INTERNATIONAL NEWS



Fear of missing the stock-market boom pushes young Japanese investors to cut spending aggressively — Young Japanese consumers are cutting a wide range of expenses, from McDonald's meals to travel, to allocate more money to investment accounts...

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026



US dollar climbs to a one-week high after the US resumes military operations against Iran — On the morning of July 8, the USD jumped to its highest level in a week after the US unexpectedly resumed military operations against Iran, prompting safe-haven flows...

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026



EU could tighten carbon-fee rules for shipping — Ships docking at EU ports could face millions of euros in additional carbon fees as Brussels plans to close loopholes that have allowed many vessels...

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026



China's central bank keeps buying gold despite lower prices — The People's Bank of China (PBoC) continued to buy gold in June, marking the 20th consecutive month of reserve accumulation and showing Beijing's continued commitment...

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026



Japanese bond yields hit a 30-year high — Concerns over long-term spending plans pushed Japanese government bond yields to their highest level since 1996.

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026



India asks the US to drop its proposed 12.5% tariff on exports — India has asked the US to withdraw a proposed additional 12.5% levy on Indian goods under a forced-labor investigation, arguing that...

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026



ECB urges European banks to prepare for AI-driven cyber risks — The ECB sent letters to 110 supervised banks warning that AI-related risks are likely to persist rather than prove short-lived.

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026



Japan leads a boom in Asia's bond market — Japanese companies accounted for up to 40% of total volume, marking a notable reversal from the period when Chinese firms dominated the market...

INTERNATIONAL NEWS

Updated at 15:35:21 · 08/07/2026

DOMESTIC NEWS

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Deputy Prime Minister: Vietnam aims to make green finance and the carbon market core pillars

MACRO | 20 minutes ago



National Assembly to hold an extraordinary session in early August 2026

MACRO | 47 minutes ago



Public-investment disbursement from the beginning of the year to July 2 reached nearly VND361tn

ECONOMY & INVESTMENT | 2 hours ago



Standing Deputy Prime Minister: Adjusting Power Plan VIII must meet new development requirements

NEWS | Today



New information on financial-support mechanisms for households installing rooftop solar power

NEWS | Today



View from Prof. Tran Van Tho: What does the private economy need to lead growth?

NEWS | Today

CORPORATE NEWS

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Asean Securities to offer shares to existing shareholders, doubling capital to VND3,000bn — Asean Securities Corporation (Aseansc) will offer shares to shareholders at a 1:1 ratio, with an offering price of VND10,000/share.

CORPORATE NEWS | Updated at 15:35:21 · 08/07/2026



Lumiere Riverside project owner raises VND7,000bn via bonds — In a single issuance, Parkland 53 raised VND7,000bn from one-year bonds. The company is currently the developer of the Lumiere project...

CORPORATE NEWS | Updated at 15:35:21 · 08/07/2026



BIDV sets record date for a 4.5% cash dividend, with expected payout of over VND3,276bn in August — Joint Stock Commercial Bank for Investment and Development of Vietnam (BIDV, HOSE: BID) has announced the implementation of its 2025 cash dividend payment. The ex-dividend date...

CORPORATE NEWS | Updated at 15:35:21 · 08/07/2026



With shares placed under warning status, BNA seeks loans and guarantees of more than VND260bn — Against the backdrop of BNA shares being placed under warning status and continuing to face trading restrictions due to multiple disclosure violations, the Board of Directors has repeatedly approved...

CORPORATE NEWS | Updated at 15:35:21 · 08/07/2026



Housing leads real-estate M&A in 1H2026, while data centers become a new hotspot — Although FDI inflows into Vietnam continued to grow strongly in the first six months of 2026, foreign investors have become increasingly selective when choosing projects. According to...

CORPORATE NEWS | Updated at 15:35:21 · 08/07/2026



Hoang Huy Green River: Ready-to-move-in homes with an existing amenity ecosystem — As Vietnam's 2026 real-estate market shifts strongly toward "real value," Hoang Huy Green River is becoming a focal point in...

CORPORATE NEWS | Updated at 15:35:21 · 08/07/2026



EVENT CALENDAR

Upcoming corporate and macro events

08/2026

26

NTW

Cash dividend payment of VND1,000/share

Dividend

08/2026

04

DRL

Cash dividend payment of VND1,500/share

Dividend

08/2026

20

CLX

Cash dividend payment of VND750/share

Dividend

08/2026

12

HCM

Cash dividend payment of VND400/share

Dividend

08/2026

14

VIT

Cash dividend payment of VND200/share

Dividend

08/2026

14

VIT

Cash dividend payment of VND500/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

1,853.70

+0.29%

CHANGE

+5.45 pts

TURNOVER 14,738.2bn | +2,691.2bn
(+22.34%)

Advancers

172

Unchanged

76

Decliners

128

VN30

1,998.44

+0.13%

CHANGE

+2.53 pts

TURNOVER 7,859.1bn | +899.5bn
(+12.92%)

Advancers

19

Unchanged

3

Decliners

8

HNX-INDEX

300.39

+2.26%

CHANGE

+6.65 pts

TURNOVER 1,323.9bn | +193.9bn
(+17.16%)

Advancers

Unchanged

Decliners

MARKET RECAP

VN-Index traded in a tug-of-war above the reference level and closed up more than 5 points, confirming a positive trading tone as the index finished in the upper part of the day's average range. Demand improved visibly, driving a strong rebound in liquidity and supporting positive market breadth, with 172 advancers on HOSE and leadership from 19/30 VN30 constituents. Gains dominated key sectors such as Fertilizers & Chemicals, Oil & Gas, Real Estate and Steel, providing a solid cushion for the index despite corrective pressure from selected stocks and foreign net selling of VND370bn, concentrated mainly in large caps such as MSN, VHM and VPB.

OUR VIEW

VN-Index is sending a neutral signal as it closed at 1,854 points, between the MA20 and MA10, while RSI and MFI were anchored at 52 and 50, respectively, indicating that the current rebound still lacks momentum confirmation to establish a clearer uptrend. Although buyers held a slight advantage as the index closed near the day's high, the market still needs to test the 1,870–1,880 resistance zone before confirming a breakout; therefore, the base-case scenario for the next session is likely to remain narrow range-bound trading before a clearer trend takes shape toward the close. In this context, short-term investors should maintain a moderate equity exposure, avoid chasing rebounds and focus on range trading within 1,850–1,880, while prioritizing stocks with idiosyncratic catalysts such as State divestments, economic-development resolutions, the market-upgrade roadmap or the offshore cycle. Meanwhile, medium- and long-term investors may continue to accumulate, in tranches, on pullbacks toward support, focusing on fundamentally sound and liquid sectors such as Banking, Securities, Retail, Public Investment and Oil & Gas.

[FOREIGN FLOW SPOTLIGHT](#)[Net-buying sessions 1/6](#)

FOREIGN NET BUY/SELL OVER 6 SESSIONS

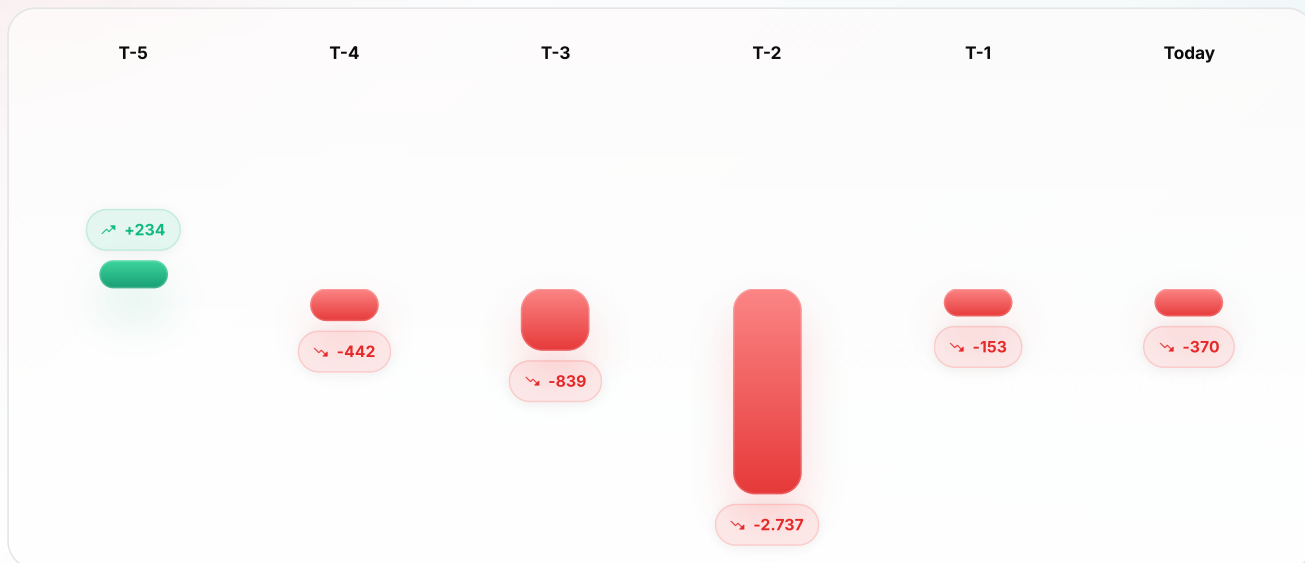
Today -370

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

Cumulative six-session net selling -4.307

Largest swing -2.737

Reversal session T-5



Source: Algo, ASEANSC compilation

Key takeaway: Foreign investors recorded cumulative net selling of VND4,307bn over six sessions, with net selling in 5/6 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	VN30	HNX-INDEX
1,853.70 +0.29%	1,998.44 +0.13%	300.39 +2.26%
CHANGE +5.45 pts	CHANGE +2.53 pts	CHANGE +6.65 pts
TURNOVER 14,738.2bn +2,691.2bn (+22.34%)	TURNOVER 7,859.1bn +899.5bn (+12.92%)	TURNOVER 1,323.9bn +193.9bn (+17.16%)
Advancers 172 Unchanged 76 Decliners 128	Advancers 19 Unchanged 3 Decliners 8	Advancers Unchanged Decliners

MARKET RECAP

VN-Index traded in a tug-of-war above the reference level and closed up more than 5 points, confirming a positive trading tone as the index finished in the upper part of the day's average range. Demand improved visibly, driving a strong rebound in liquidity and supporting positive market breadth, with 172 advancers on HOSE and leadership from 19/30 VN30 constituents. Gains dominated key sectors such as Fertilizers & Chemicals, Oil & Gas, Real Estate and Steel, providing a solid cushion for the index despite corrective pressure from selected stocks and foreign net selling of VND370bn, concentrated mainly in large caps such as MSN, VHM and VPB.

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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

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%	07/07 1,848.25 +4.75 pts +0.26%	08/07 1,853.70 +5.45 pts +0.29%

Strongest up session

+7.20 pts

Sharpest down session

-18.58 pts

6-session cumulative

-6.31 pts

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET BUY/SELL OVER 6 SESSIONS

Today -370

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

Cumulative six-session net selling

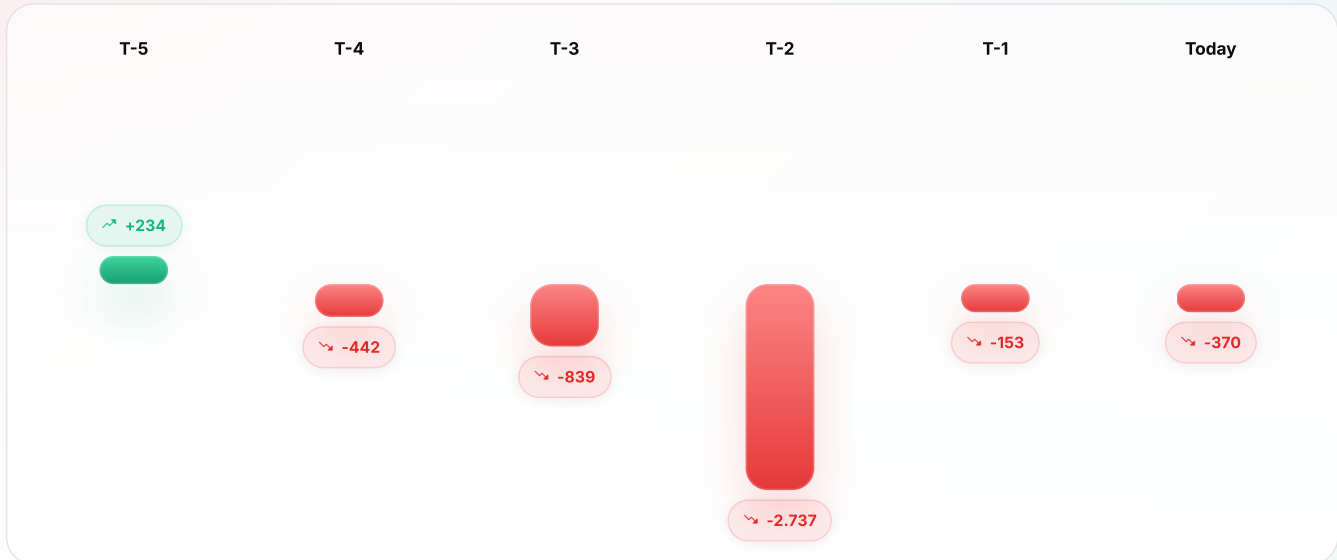
-4.307

Largest swing

-2.737

Reversal session

T-5



Source: Algo, ASEANSC compilation

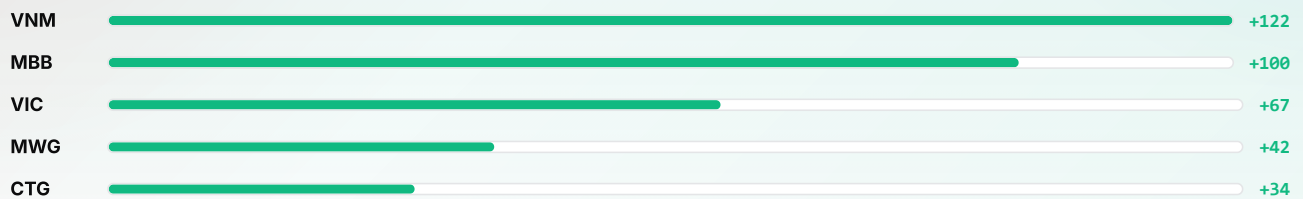
Key takeaway: Foreign investors recorded cumulative net selling of VND4,307bn over six sessions, with net selling in 5/6 sessions.

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



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

02/07/2026 – 08/07/2026 (1 week)

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Foreign Flow Heatmap

1 WEEK

Earnings Season	-22,83
IPO Wave	-22,88
FDI & Industrial Parks	-38,27
Power	-65,12
Exports	-123,92
Public Investment	-129,12
New Oil Discoveries	-134,74
Block B–O Mon Gas-to–Power Chain	-168,46
US–Iran	-181,75
State Divestments	-199,46
Resolution 79	-275,81
Real Estate	-442,98
Consumer & Retail	-465,45
Banking	-540,97
Index Heavyweight Support	-1.178,15
FTSE Upgrade	-1.362,6
Resolution 68	-1.525,72

Domestic Flow Heatmap

1 WEEK

IPO wave	+2.754,11
Resolution 68	+1.844,84
Real Estate	+1.042,19



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.

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.



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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