

🕒 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	52,487.41	+139.02 (0.27%)
S&P 500 derived	7,543.64	+60.93 (0.81%)
Nasdaq	26,206.89	+336.24 (1.3%)
Small Cap 2000 derived	2,992.54	+36.15 (1.22%)
S&P 500 VIX derived	16.06	+0.22 (1.39%)
S&P/TSX	35,200.45	+264.65 (0.76%)

Sources: Investing.com, Vietstock, ASEANSC compilation

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### 🌐 INTERNATIONAL NEWS



**US home prices hit new record, buyers continue to pull back** — US home prices continued to set a new record in June amid tight supply, while existing-home sales unexpectedly declined as mortgage rates remained...

**INTERNATIONAL NEWS**

Updated at 15:35:50 · 10/07/2026



**ECB President says digital euro will not replace cash** — The ECB President rejected concerns that the digital euro is designed to track citizens' payment transactions and affirmed that the digital euro...

**INTERNATIONAL NEWS**

Updated at 15:35:50 · 10/07/2026



**SK Hynix raises USD26.5bn in US, setting record for largest foreign IPO ever** — SK Hynix raised USD26.5bn in its Nasdaq debut, becoming the largest US listing ever by a foreign company...

**INTERNATIONAL NEWS**

Updated at 15:35:50 · 10/07/2026



**US and Iran continue technical talks amid escalating conflict** — The US will conduct technical talks with Iran and remains committed to seeking a solution to the conflict, despite the two countries repeatedly carrying out airstrikes...

**INTERNATIONAL NEWS**

Updated at 15:35:50 · 10/07/2026



**Fed begins major overhaul with prominent advisers** — Federal Reserve Chair Kevin Warsh invited former Bank of England (BOE) Governor Mervyn King and crypto investor Marc...

**INTERNATIONAL NEWS**

Updated at 15:35:50 · 10/07/2026



**EU imposes anti-dumping duties of up to 45.3% on Chinese tires** — Europe imposed anti-dumping duties of 4.3-45.3% on passenger car and light-truck tires imported from China, aiming to protect the domestic tire manufacturing industry...

**INTERNATIONAL NEWS**

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**Global gold prices rise more than 1% on bargain-hunting demand** — Gold prices rose more than 1% in the 09/07 session as bargain-hunting emerged after the previous sharp decline, while investors continued to track...

**INTERNATIONAL NEWS**

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**Wall Street broadly higher as chip stocks recover** — US stocks gained in the 09/07 session thanks to a recovery in semiconductor stocks and lower oil prices, despite tensions between the US and...

**INTERNATIONAL NEWS**

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## DOMESTIC NEWS

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**Wood sector faces challenge of sustaining export growth**

**ECONOMY - INVESTMENT** | 3 hours ago



**HCMC scores public investment disbursement, cuts capital for slow-moving projects**

**ECONOMY - INVESTMENT** | 4 hours ago



**What advice do international experts offer to attract capital for Vietnam's International Financial Center?**

**ECONOMY - INVESTMENT** | 4 hours ago



**HCMC 6M GRDP grows 8.55%, highest in 10 years**

**MACRO** | 4 hours ago



**Seaport planning: Number of seaports to fall from 36 to 23, with 4 special seaports to be added**

**NEWS** | Today



**Beyond capital injection, the economy needs a "super lever" to break out in 2H26**

**NEWS** | Today



**REE extraordinary AGM: 6M profit estimated at VND1.3tn; Mai Thanh officially steps down as Chairwoman** — The 2026 extraordinary AGM of Refrigeration Electrical Engineering Corporation (HOSE: REE) was successfully held on the morning of 10/07/2026. Besides the most important matter of completing...

**CORPORATE NEWS** | Updated at 15:35:50 · 10/07/2026



**Gilimex loses lawsuit against Amazon; court concludes company submitted over 90 forged documents** — The US District Court for the Southern District of New York dismissed the entire lawsuit filed by Binh Thanh Import-Export Production and Trade JSC (HOSE: GIL - Gilimex) against Amazon, while...

**CORPORATE NEWS** | Updated at 15:35:50 · 10/07/2026



**Sacombank appoints Loic Faussier as CEO** — On 10/07/2026, the Board of Directors of Saigon Thuong Tin Commercial Joint Stock Bank (Sacombank, HOSE: STB) officially announced and presented the appointment decision for Loic Faussier...

**CORPORATE NEWS** | Updated at 15:35:50 · 10/07/2026



**Chairman Dinh Ba Thanh unexpectedly cuts stake significantly at DatVietVAC ahead of IPO** — Following the success of "Vu tru Say Hi", DatVietVAC decided to offer more than 11mn shares in its IPO at a price 33% below the exclusive valuation...

**CORPORATE NEWS** | Updated at 15:35:50 · 10/07/2026



**Hieuthuhai, Rhyder, Quang Hung MasterD... how have they become DatVietVAC's "money-printing machines"?** — With a management and exclusive commercial representation network for many top names such as Hieuthuhai, Quang Hung MasterD, Le Duong Bao Lam, Rhyder, Duong...

**CORPORATE NEWS** | Updated at 15:35:50 · 10/07/2026



**Rose Residence asserts position through tangible real value from an operating ecosystem** — As the real estate market enters a filtering phase, buyers' selection criteria are changing significantly. In the past, decisions...

**CORPORATE NEWS** | Updated at 15:35:50 · 10/07/2026



## EVENT CALENDAR

Upcoming corporate and macro events

10/2026

**15**

**PVI**

Cash dividend of VND2,300/share

Dividend

08/2026

**14**

**POT**

Cash dividend of VND440/share

Dividend

08/2026

**06**

**AAA**

Cash dividend of VND300/share

Dividend

08/2026

**14**

**QNW**

Cash dividend of VND1,290/share

Dividend

09/2026

**25**

**TRC**

Cash dividend of VND3,000/share

Dividend

08/2026

**18**

**DTG**

Cash dividend of VND500/share

Dividend



# MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

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**VN-INDEX** ↘

**1,828.34** -0.67%

CHANGE -12.36 pts

TURNOVER VND12,734.8bn | +VND966.1bn (+8.21%)

Advancers

86

Unchanged

65

Decliners

212

**VN30** ↘

**1,970.82** -0.82%

CHANGE -16.29 pts

TURNOVER VND7,180.8bn | +VND1,125.2bn (+18.58%)

Advancers

5

Unchanged

2

Decliners

23

**HNX-INDEX** ↘

**303.76** -0.95%

CHANGE -2.91 pts

TURNOVER VND942.4bn | - VND125.1bn (-11.72%)

Advancers

Unchanged

Decliners

## MARKET RECAP

VN-Index closed down more than 12 points as selling pressure re-emerged after 1:30 p.m., negating intraday recovery efforts and pushing the index to close at the bottom of the day's trading range. Red breadth broadened with 212 decliners on HOSE, while simultaneous weakness across leading sectors such as Securities, Oil & Gas, Fertilizers & Chemicals and Power exerted significant pressure on the market, especially as 23 of 30 VN30 constituents corrected. Although liquidity showed a slight improvement and foreign investors remained positive with net buying of more than VND1,387bn, mainly concentrated in large-cap names such as VIC, VNM and MBB, this was still insufficient to reverse the intraday trend, indicating that buyers remained on the back foot against prevailing profit-taking supply.

## OUR VIEW

VN-Index is flashing a clearly negative signal after closing at 1,828 pts, below the MA10 and MA20, while RSI and MFI weakened in tandem, confirming that selling pressure is overwhelmingly dominant. With the index closing at the session low, the risk of further correction to retest nearby support zones is high if demand does not improve soon. In the less favorable scenario, the market will likely retreat to the 1,820-1,830 support zone early in the next session before establishing a clearer direction. Against this backdrop, short-term investors should prioritize risk management by reducing exposure on technical rebounds, strictly avoid leverage and only deploy capital when bottoming signals emerge with volume confirmation, focusing on stocks with idiosyncratic catalysts such as State divestments, market-upgrade prospects, economic development resolutions or the offshore cycle. Conversely, for medium- and long-term investors, this is an appropriate time to make partial exploratory accumulation at medium-term support zones, prioritizing stocks with solid fundamentals and avoiding highly volatile or illiquid sectors.

## FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

### FOREIGN NET BUY/SELL OVER 6 SESSIONS

Today +1,570

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

6-session cumulative net selling **-3.222**    Largest swing **-2.737**    Reversal session **Today**

T-5

T-4

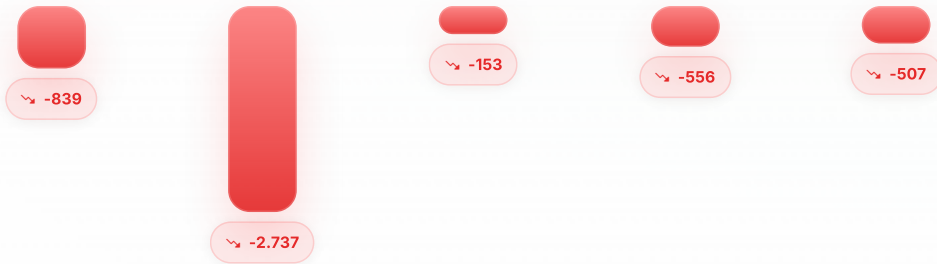
T-3

T-2

T-1

Today

+1.570



Source: Algo, ASEANSC compilation

Key highlight: Foreign investors recorded cumulative net selling of VND3,222bn over six sessions, with net selling in five of the six 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

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**1,828.34** -0.67%

CHANGE -12.36 pts

VN30

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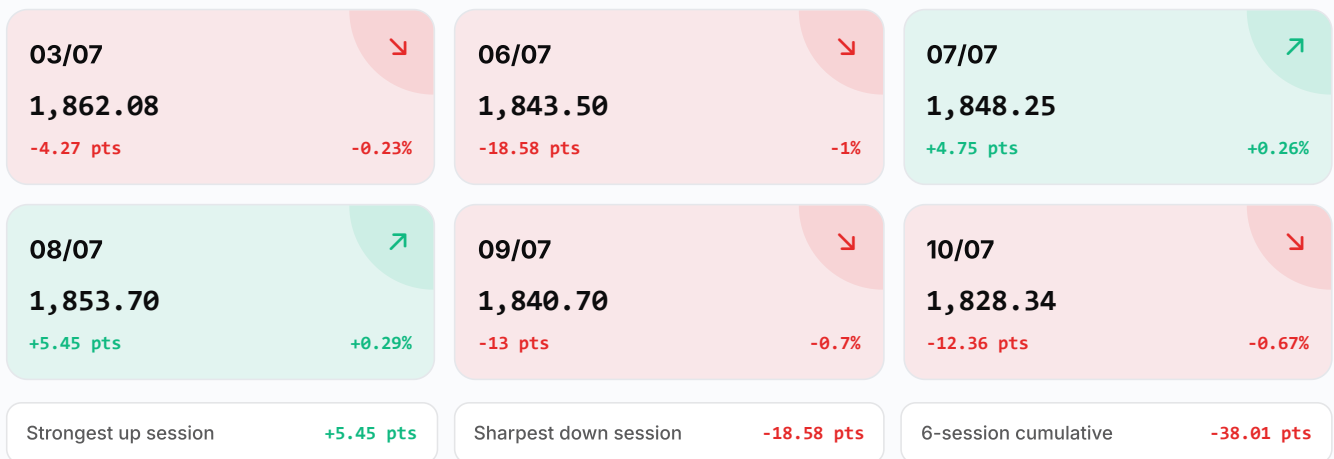
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## VN-INDEX PERFORMANCE OVER THE LAST 6 SESSIONS

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

● ADVANCERS ● DECLINERS ● SIDEWAYS



## FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

## FOREIGN NET BUY/SELL OVER 6 SESSIONS

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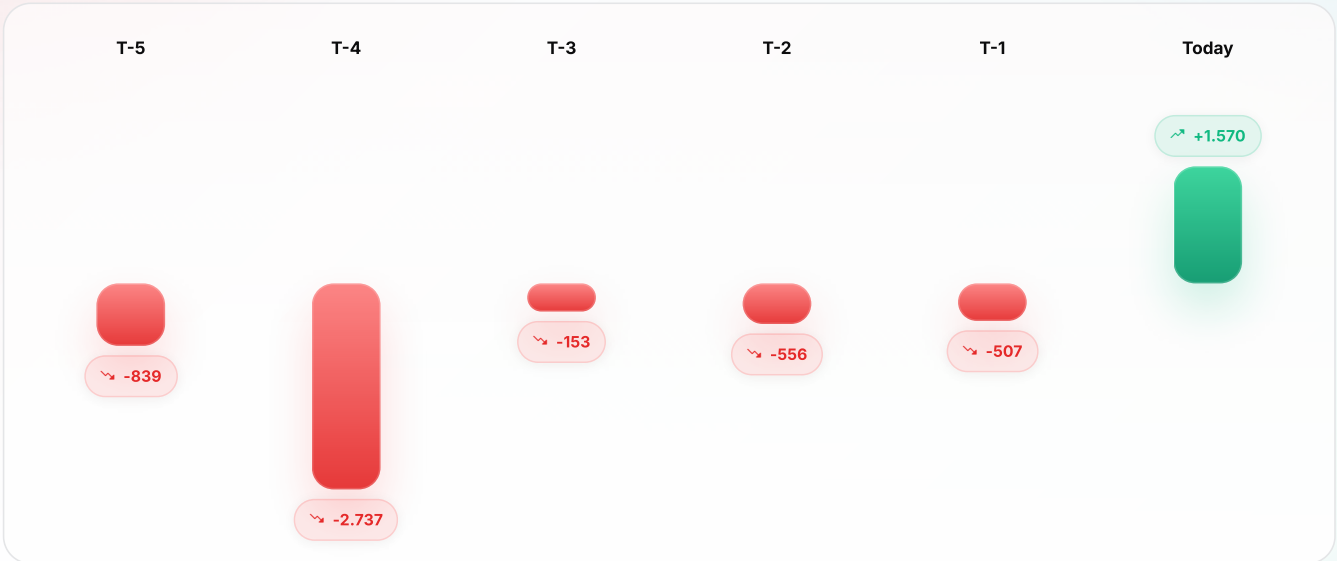
Today +1.570

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Largest swing -2.737

Reversal session

Today



Source: Algo, ASEANSC compilation

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### 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





# 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

06/07/2026 – 10/07/2026 (1 week)

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## Foreign Flow Heatmap

🕒 1 WEEK

New oil discovery	+54,98
FDI & Industrial Real Estate	+2,94
Earnings season	-4,12
State divestment	-15,43
Public Investment	-26,63
Exports	-36,1
US - Iran	-43,5
Power sector	-61,09
Resolution 79	-95,72
Lot B - O Mon gas-to-power chain	-143,54
IPO wave	-275,29
Consumption - Retail	-316,86
Real Estate	-387,93
Banking	-463,48
Large-cap support	-955,19
FTSE Upgrade	-1.058,5
Resolution 68	-1.753,56


## Domestic Flow Heatmap

🕒 1 WEEK

New oil discovery	+450,08
Consumption - Retail	+150,69
Earnings season	+99,56
US - Iran	+34,01
Exports	-179,91

FDI & Industrial Real Estate	-216,95
Real Estate	-636,67
Resolution 79	-643,34
State divestment	-652,97
Public Investment	-659,04
Power sector	-837,42
Large-cap support	-860,05
Lot B - O Mon gas-to-power chain	-1.200,13
Banking	-1.540,31
Resolution 68	-2.044,14
IPO wave	-3.763,09
FTSE Upgrade	-4.517,1

Strong negative  Strong positive




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