

08:00 AM · PRE-MARKET



MORNING BRIEF

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

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Analysis Center

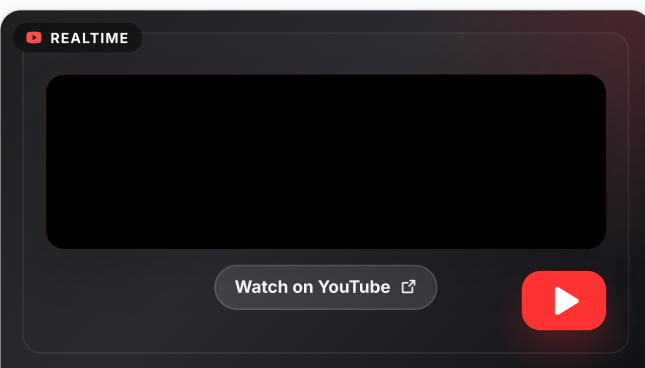
GLOBAL STOCK INDICES

Index	Level	+/- (%)
DJI	51,947.25	+235.6 (0.46%)
IXIC	24,975.82	-161.87 (-0.64%)
GSPC	7,411.98	+3.68 (0.05%)
FTSE	10,784.98	+48.75 (0.45%)
GDAXI	25,500.82	+401.82 (1.6%)
FCHI	8,433.84	+61.56 (0.74%)

Sources: Investing.com, Vietstock, ASEANSC compilation

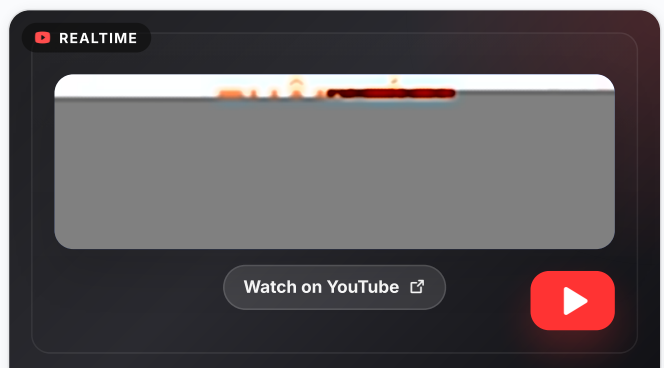
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INTERNATIONAL NEWS



Iran conflict forces Asia to reduce reliance on energy imports — The prolonged conflict in the Middle East is forcing many developing Asian economies to rethink their energy strategies. Instead of continuing to bet on...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026



How do Trump's new tariffs differ from his "Liberation Day" tariffs? — As the US-Iran military conflict enters its sixth month, US President Donald Trump has returned to the familiar front of global trade...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026



Inflation pressure pushes Fed into contentious meeting — Observers believe the US Federal Reserve (Fed) may see dissenting votes internally if the central bank continues to keep...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026



Indonesia central bank governor unexpectedly resigns — Bank Indonesia (BI) Governor Perry Warjiyo unexpectedly resigned on 27/07, a move analysts believe could increase...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026



Iran conflict drives record Chinese investment in overseas green energy — China has stepped up financing for green-energy projects under the Belt and Road Initiative (BRI) to a record high in the first half...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026



Fast fashion booms in India — A prominent three-storey Zudio store in a budget shopping district in west New Delhi reflects changing consumer habits among local people...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026



Investors flock to Chinese chip stocks; CXMT jumps nearly 500% on trading debut — Shares of CXMT, the Chinese memory-chip maker, rose nearly 500% in their first trading session on the Shanghai Stock Exchange...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026



The Haaland effect: How a football star created an 'economic fever' for Norway — From sold-out jerseys and hair ties to surging salmon exports and a chess project raising USD10mn when he invested...

INTERNATIONAL
NEWS

Updated at 16:30:45 ·
27/07/2026

DOMESTIC NEWS

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Energization completed for the full 500/220kV Nho Quan - Phu Ly - Thuong Tin transmission line

ECONOMY - INVESTMENT | 4 hours ago



Which premium agricultural products does Vietnam import from the US?

ECONOMY - INVESTMENT | 4 hours ago



Growth-model renewal raises expectations for an economic leap and breakthrough

NEWS | Today



Hue City has a new People's Committee Chairman

NEWS | Today



Ministry of Finance continues improving the management mechanism for lottery operations

NEWS | Today



Nearly 1,500 sets of martyr remains found during the 500-day-and-night campaign

NEWS | Today

CORPORATE NEWS

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**PV GAS dismisses CEO Pham Van Phong —**

According to a notice dated 22/07, Vietnam Gas Corporation - JSC (PV GAS, HOSE: GAS) issued a decision to dismiss incumbent CEO Pham Van Phong.

CORPORATE NEWS | Updated at 16:30:45 · 27/07/2026

**Lower claims expenses help Agribank Insurance (ABI) lift 2Q NPAT by 33% —**

According to its recently released financial statements, in 2Q26, Agriculture Bank Insurance JSC (ABIC, UPCoM: ABI) recorded net insurance operating revenue of more than...

CORPORATE NEWS | Updated at 16:30:45 · 27/07/2026

**2Q profit breakout: Techcombank uses AI technology as leverage for a new strategic cycle**

— Profit rose 22% YoY, with particularly strong growth in 2Q showing that Techcombank is accelerating alongside the rapid development of...

CORPORATE NEWS | Updated at 16:30:45 · 27/07/2026

**APG offers 50mn shares at 2.4x market price; Chairmans wife expected to buy the most —**

On 22/07, APG Securities BOD approved a resolution to implement a private placement of up to 50mn shares to 15 individual investors. In which, the Chairman's wife...

CORPORATE NEWS | Updated at 16:30:45 · 27/07/2026

**Cen Land divests entire stake in Pho Xanh Group Real Estate —**

Century Land JSC (Cen Land, HOSE: CRE) has completed procedures to transfer its entire 51% stake in Real Estate Services and Investment JSC...

CORPORATE NEWS | Updated at 16:30:45 · 27/07/2026

**2Q net profit evaporates 71%; Binh Dien Fertilizer records weakest quarter in three years**

— Binh Dien Fertilizer JSC (HOSE: BFC) had a sharply weaker 2Q versus the same period, due to soft consumption demand and rising cost pressure.

CORPORATE NEWS | Updated at 16:30:45 · 27/07/2026



EVENT CALENDAR

Upcoming corporate and macro events

09/2026

04

SEB

Cash dividend of VND1,800/share

Dividend

08/2026

26

SGS

Cash dividend of VND1,200/share

Dividend

08/2026

26

DKC

Cash dividend of VND1,200/share

Dividend

08/2026

14

IN4

Cash dividend of VND4,000/share

Dividend

08/2026

20

PLX

Cash dividend of VND1,200/share

Dividend

12/2026

15

AIG

Cash dividend of VND500/share

Dividend



MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

[Place order](#)[Analysis Center](#)

VN-INDEX

1,669.01

-1.01%

CHANGE

-17.1 pts

TRADING

VND12,280.0bn |

VALUE

+VND355.8bn (+2.98%)

Adv 79

Flat 37

Dec 258

VN30

1,806.50

-1.25%

CHANGE

-22.86 pts

TRADING

VND6,990.3bn |

VALUE

+VND368.0bn (+5.56%)

Adv 5

Flat 1

Dec 24

HNX-INDEX

269.35

-1.33%

CHANGE

-3.64 pts

TRADING

VND842.2bn |

VALUE

+VND117.7bn (+16.25%)

Adv

Flat

Dec

MARKET MOVEMENT

VN-Index closed down 17.10 points as selling pressure returned strongly late in the day, causing the index to close in the lower half of its intraday range and erasing the prior recovery attempt. Red breadth widened with 258 decliners on HOSE, while the VN30 basket was the main drag with 24/30 constituents weakening, alongside broad-based corrections in sensitive sectors such as Securities, Real Estate, Steel and Seaports. Foreign flows continued to weigh on the market with net selling of VND601bn, focused on large-cap names such as VHM, VIX and TCB. Although liquidity showed a slight improvement and a few individual stocks maintained positive momentum, the market remained firmly tilted toward sellers, indicating that buyers' current stabilization effort was not yet strong enough to reverse the intraday trend.

MARKET VIEW

VN-Index is flashing a clearly negative signal after closing at 1,669 pts, confirming weakness as it breached the MA10 and MA20 while overwhelming selling pressure pushed the index toward the session low. Although RSI (27) and MFI (20) have both fallen into oversold territory and indicate weak money flow, suggesting scope for a short-term technical rebound, the downtrend still dominates with the risk of retesting nearby support zones. In the less favorable scenario, the index may continue to move lower toward support early in the next session before setting a clearer direction late in the day. Therefore, the optimal strategy is to prioritize risk management, reduce leverage exposure and only deploy capital when bottoming signals appear alongside improving liquidity. For short-term investors, the key focus is to monitor the market's reaction around the 1,660-1,670 zone, while screening for 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 consider partial exploratory accumulation at medium-term support zones in fundamentally solid stocks, while avoiding highly volatile and low-liquidity names.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET BUYING/SELLING OVER 6 SESSIONS

Today -142

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

6-session cumulative net selling

-3.821

Largest swing

-1.963

Reversal session

T-4

T-5

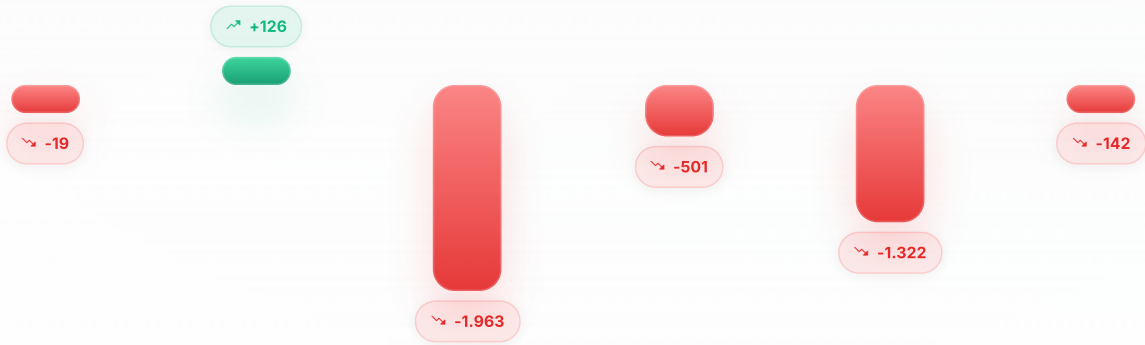
T-4

T-3

T-2

T-1

Today



Source: Algo, compiled by
ASEANSC

Key highlight: Foreign investors recorded cumulative net selling of VND3,821bn 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 in the session.

TOP 5 NET BOUGHT



LPB	+70
VSC	+17
NAF	+14
DGW	+7
PC1	+7

TOP 5 NET SOLD



GEX	-33
DCM	-23
VCK	-16
VPI	-16
VPX	-14

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
1,669.01
CHANGE **-1.01%**
-17.1 pts

VN30
1,806.50
CHANGE **-1.25%**
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TRADING
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+VND355.8bn (+2.98%)

Adv 79

Flat 37

Dec 258

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Adv 5

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Dec 24

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(+16.25%)

Adv

Flat

Dec

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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

20/07

1,743.51

-43.94 pts

-2.46%

21/07

1,730.56

-12.95 pts

-0.74%

22/07

1,668.53

-62.03 pts

-3.58%

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%

Strongest up session

+30.85 pts

Sharpest down session

-62.03 pts

6-session cumulative

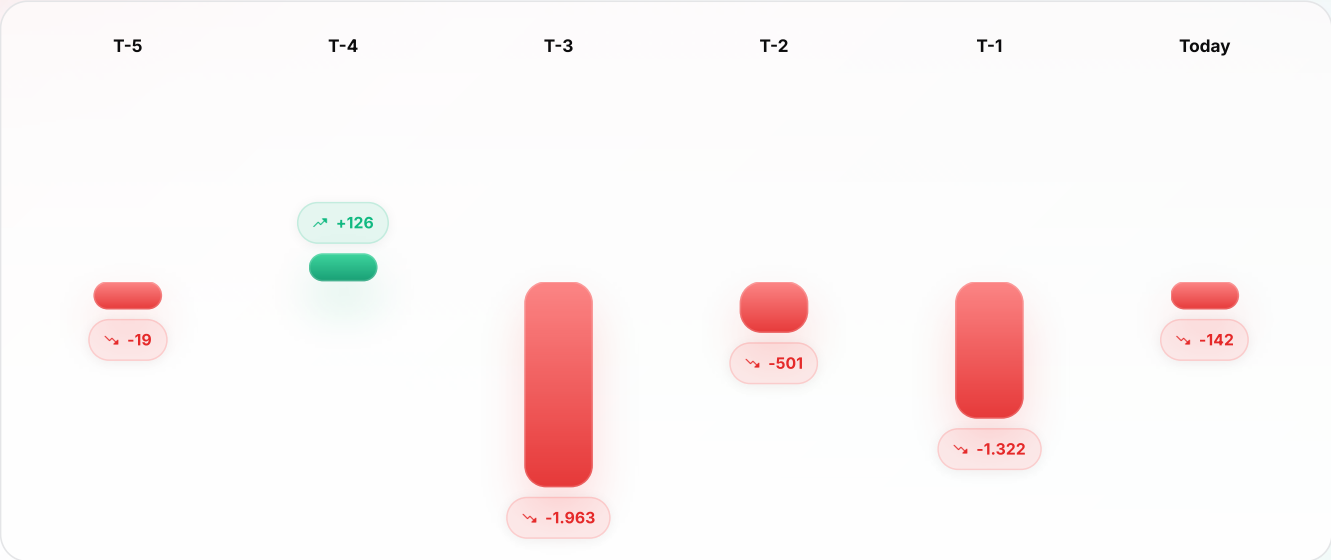
-118.44 pts

FOREIGN NET BUYING/SELLING OVER 6 SESSIONS

Today -142

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

6-session cumulative net selling -3.821 Largest swing -1.963 Reversal session T-4

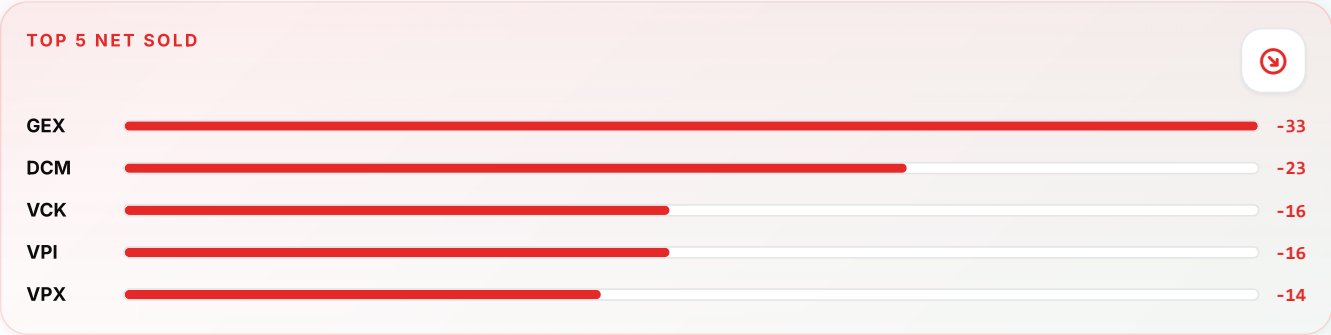


Source: Algo, compiled by ASFANSC Key highlight: Foreign investors recorded cumulative net selling of VND3,821bn over six sessions, with net selling in five of the six sessions.

FLOW LEADERS

TOP FOREIGN TRADING

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





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

21/07/2026 – 27/07/2026 (1 week)

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Foreign Flow Heatmap

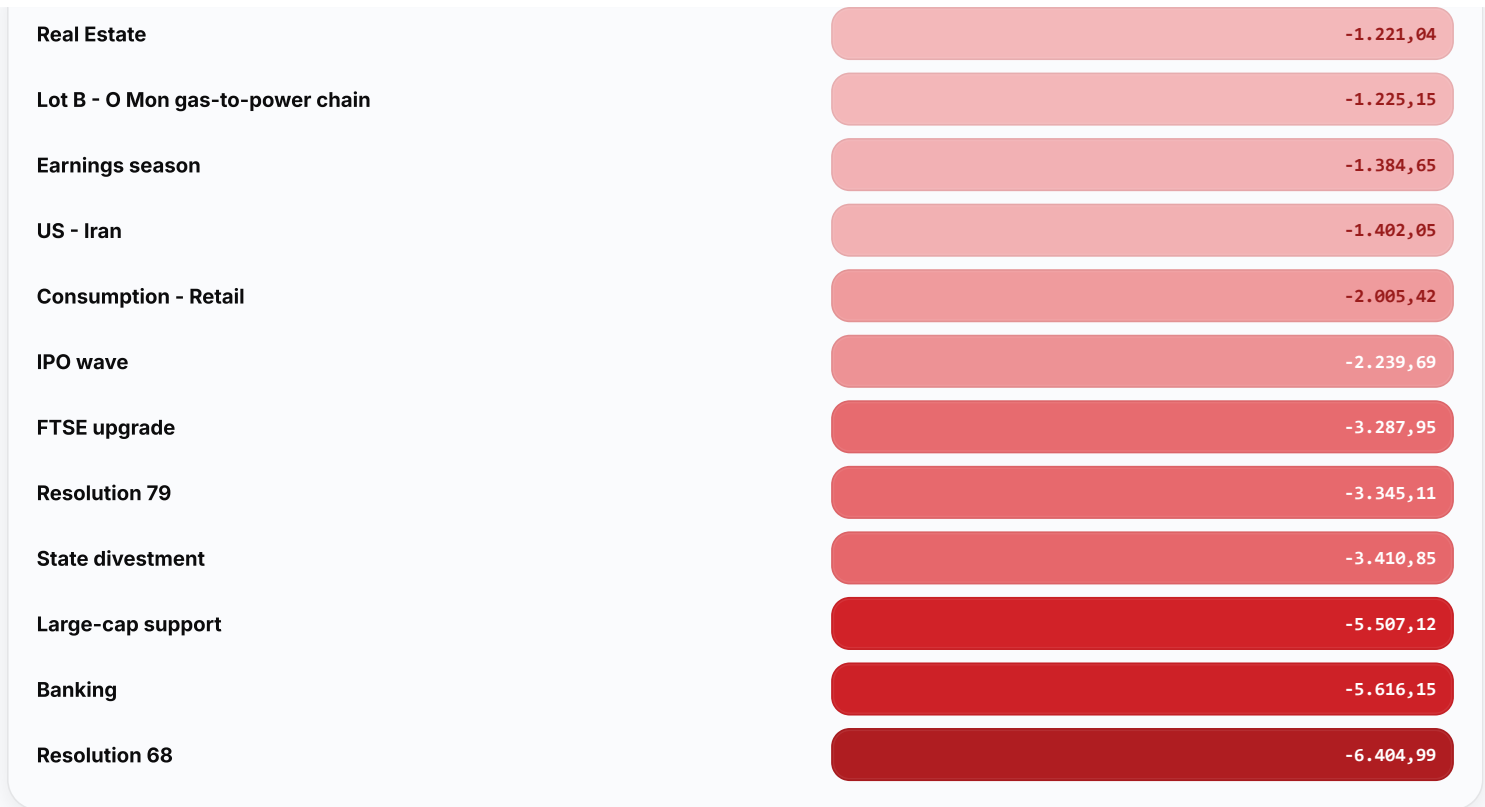
🕒 1 WEEK

Public investment	+170,19
Power sector	+27,54
Earnings season	+13,56
FDI & Industrial Real Estate	-59,92
Exports	-91,33
Lot B - O Mon gas-to-power chain	-157,71
Real Estate	-174,38
US - Iran	-207,71
New oil discovery	-212,44
IPO wave	-301,86
Consumption - Retail	-406,19
State divestment	-422,84
Resolution 79	-424,49
FTSE upgrade	-533,23
Large-cap support	-857,88
Banking	-1.795,7
Resolution 68	-2.252,76

Domestic Flow Heatmap

🕒 1 WEEK

Power sector	+12,94
Exports	-48,59
Public investment	-240,44
FDI & Industrial Real Estate	-302,08
New oil discovery	-1.180,66



Strong negative  Strong positive

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