

🕒 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

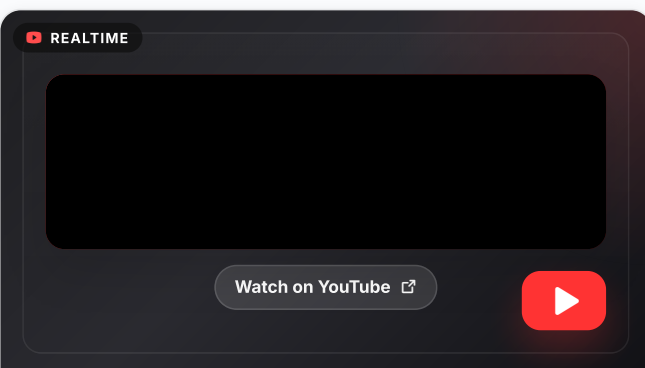
🌐 GLOBAL STOCK INDICES

Index	Level	+/- (%)
DJI	52,208.06	+613.92 (1.19%)
IXIC	25,122.18	+679.24 (2.78%)
GSPC	7,437.63	+121.48 (1.66%)
FTSE	10,978.01	+80.74 (0.74%)
GDAXI	25,839.66	+227.63 (0.89%)
FCHI	8,559.72	+74.08 (0.87%)

Sources: Investing.com, Vietstock, ASEANSC compilation

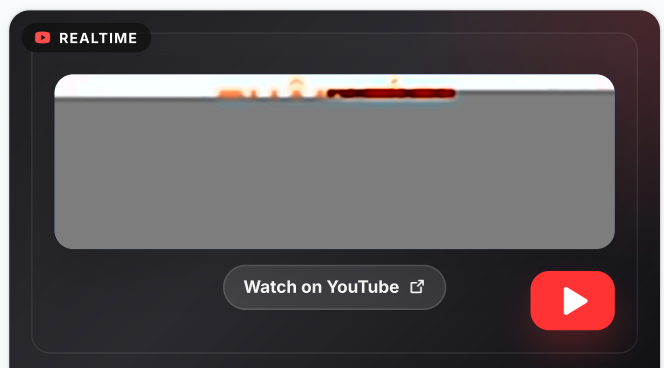
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🌐 INTERNATIONAL NEWS



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Amazon said its two AI-related businesses—AI cloud services and AI chips—both delivered triple-digit growth, with recurring revenue...

INTERNATIONAL
NEWS

Updated at 16:22:52 ·
31/07/2026



Japan keeps policy rate unchanged, slightly raises growth forecast —

In its latest economic outlook, the BOJ raised its FY2026 growth forecast for Japan to 0.6%, while lowering its...

INTERNATIONAL
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The long decline of the diamond giant (Part 1): Supply monopoly fades —

In July 2026, Anglo American put De Beers up for sale at less than one-tenth of its 2011 valuation, ending more than a century of control over diamond supply. The...

INTERNATIONAL
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AI stock bubble deflates; South Korean investors lament: "My life is over" —

Just a few months ago, Song Mi-kyung, a 60-year-old Seoul resident, had earned about KRW 300mn (USD 200,000) from the rally in...

INTERNATIONAL
NEWS

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31/07/2026



South Korean stocks reverse higher by 13%; Samsung and SK hynix surge over 20% — South Korean equities opened sharply higher on July 31 as semiconductor stocks rallied broadly, extending Wall Street's upbeat momentum...

INTERNATIONAL
NEWS

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Global gold rises over 1% as the U.S. dollar weakens — Gold gained more than 1% on July 30 as the U.S. dollar weakened and U.S. inflation data came in as expected, prompting investors to scale back expectations...

INTERNATIONAL
NEWS

Updated at 16:22:52 ·
31/07/2026



Oil prices reverse nearly 2% lower — Global oil prices declined on July 30 after Saudi Arabia proposed forming a naval coalition to protect strategic shipping routes, amid...

INTERNATIONAL
NEWS

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31/07/2026



Dow Jones gains over 600 pts after Microsoft's strong results; AI stocks regain momentum — U.S. equities closed higher on July 30 after Microsoft issued a better-than-expected business outlook, easing investor concerns over the...

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NEWS

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DOMESTIC NEWS

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Thai retail giant Central Retail seeks to expand investment in Hanoi

ECONOMY - INVESTMENT | 39 minutes ago



Why has energy inflation decoupled from Brent crude?

MACRO | 1 hour ago



Ho Chi Minh City still landfills nearly 60% of household waste

ECONOMY - INVESTMENT | 4 hours ago



To achieve double-digit growth, localities must rethink policy and scale up domestic enterprises

NEWS | Today



Air logistics gains momentum from new infrastructure

NEWS | Today



Proposal to extend the Ben Thanh–Suoi Tien metro to Long Thanh Airport as an urgent project

NEWS | Today

CORPORATE NEWS

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BIDV's 2Q pretax profit rises 20% — BIDV's consolidated 2Q2026 financial statements showed pretax profit of nearly VND 10,333bn...

CORPORATE NEWS | Updated at 16:22:52 · 31/07/2026



BVH posts over VND 32tn revenue in 1H, up nearly 10% — Bao Viet Holdings (HOSE: BVH) announced its unaudited 2Q2026 results, with the parent company and subsidiaries recording growth...

CORPORATE NEWS | Updated at 16:22:52 · 31/07/2026



BAF earns over VND 310bn in 1H as hog output rises sharply — In 1H2026, BAF Vietnam Agriculture JSC (HOSE: BAF) recorded strong livestock growth, with sales volume rising 50%...

CORPORATE NEWS | Updated at 16:22:52 · 31/07/2026



Bamboo Airways suspends Hanoi-Lijiang route; several domestic routes reportedly without flights — Bamboo Airways announced the suspension of the Hanoi-Lijiang (China) route from August 1. At the same time, many passengers reported...

CORPORATE NEWS | Updated at 16:22:52 · 31/07/2026



Phat Dat posts over VND 80bn net profit; other receivables surge to VND 5tn, including VND 1.7tn from one individual — A series of asset transfers generated financial income, supporting Phat Dat's 2Q net profit growth, while a sizeable receivable emerged...

CORPORATE NEWS | Updated at 16:22:52 · 31/07/2026



Despite sharply higher provisions, VietinBank's 2Q pretax profit rises 22% — VietinBank's consolidated 2Q2026 financial statements showed pretax profit of nearly VND 14,729bn, up 22% YoY...

CORPORATE NEWS | Updated at 16:22:52 · 31/07/2026



EVENT CALENDAR

Upcoming corporate and macro events

08/2026

19

MCH

Cash dividend of VND 2,000/share

Dividend

09/2026

10

X20

Cash dividend of VND 1,000/share

Dividend

09/2026

14

BTW

Cash dividend of VND900/share

Dividend

09/2026

14

SSI

Cash dividend of VND1,000/share

Dividend

09/2026

15

TMW

Cash dividend of VND 2,000/share

Dividend

08/2026

28

DHN

Cash dividend of VND 1,500/share

Dividend



MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

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VN-INDEX

1,735.78

-0.51%

CHANGE

-8.88 pts

GTGD 15,941.0 VND bn | -782.6 VND bn (-4.68%)

Gainers

126

Unchanged

49

Decliners

200

VN30

1,872.07

-0.75%

CHANGE

-14.2 pts

GTGD 9,613.8 VND bn | -224.5 VND bn (-2.28%)

Gainers

10

Unchanged

2

Decliners

18

HNX-INDEX

271.25

-1.38%

CHANGE

-3.8 pts

GTGD 705.0 VND bn | -175.4 VND bn (-19.92%)

Gainers

Unchanged

Decliners

MARKET MOVEMENT

VN-Index closed nearly 9 pts lower as portfolio-rebalancing pressure intensified into the close, erasing the intraday recovery attempt and pushing the index to the session low. Decliners broadened across HOSE, with 200 stocks falling, while the VN30 basket made a notable negative contribution as 18 constituents declined. Market-sensitive sectors such as securities, steel, oil & gas and seafood also moved lower in tandem. Cautious sentiment prevailed as liquidity eased slightly, while foreign investors posted net selling of VND 300bn, concentrated in large-cap names including VHM, TCB and VPB, further weakening market breadth. Port stocks were a rare bright spot and maintained positive momentum, but this was insufficient to offset dominant selling pressure.

MARKET VIEW

VN-Index is sending a neutral signal after closing at 1,736 pts between the MA10 and MA20, while late-session selling pressure points to a more cautious near-term bias. With RSI at 44 and MFI weakening to 34, current upward momentum remains insufficient to confirm a clear reversal, suggesting the market may continue trading in a narrow range early in the next session before establishing a more definitive direction. Against this backdrop, short-term investors should maintain a medium equity weighting, avoid chasing rebounds and trade around support at 1,730–1,740 and resistance at 1,750–1,760. Priority may be given to stocks with idiosyncratic catalysts such as SOE divestment, economic-development resolutions, the market-upgrade roadmap or the offshore oil & gas cycle. Meanwhile, medium- and long-term investors may use pullbacks toward support to accumulate gradually in fundamentally sound and liquid sectors such as banks, securities, retail, public investment and oil & gas.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOW OVER SIX SESSIONS

Today -300

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

6-session cumulative net selling

-3.995

Largest swing

-2.099

Reversal session

T-1

T-5

T-4

T-3

T-2

T-1

Today

+580



FLOW LEADERS

TOP FOREIGN TRADES

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

TOP 5 NET BOUGHT

VCB	+271
FPT	+119
VIC	+85
FRT	+61
VRE	+60

TOP 5 NET SOLD

VHM	-241
TCB	-69
VPB	-68
NVL	-64
ACB	-59

15:30 PM · MARKET CLOSE



MARKET CLOSE

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

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Analysis Center

INDEX SUMMARY

VN-INDEX
1,735.78
CHANGE -8.88 pts
GTGD 15,941.0 VND bn | -782.6 VND bn (-4.68%)

VN30
1,872.07
CHANGE -14.2 pts
GTGD 9,613.8 VND bn | -224.5 VND bn (-2.28%)

HNX-INDEX
271.25
CHANGE -3.8 pts
GTGD 705.0 VND bn | -175.4 VND bn (-19.92%)

Gainers

Unchanged

Decliners

Gainers
126

Unchanged
49

Decliners
200

Gainers 10

Unchanged
2

Decliners
18

MARKET MOVEMENT

VN-Index closed nearly 9 pts lower as portfolio-rebalancing pressure intensified into the close, erasing the intraday recovery attempt and pushing the index to the session low. Decliners broadened across HOSE, with 200 stocks falling, while the VN30 basket made a notable negative contribution as 18 constituents declined. Market-sensitive sectors such as securities, steel, oil & gas and seafood also moved lower in tandem. Cautious sentiment prevailed as liquidity eased slightly, while foreign investors posted net selling of VND 300bn, concentrated in large-cap names including VHM, TCB and VPB, further weakening market breadth. Port stocks were a rare bright spot and maintained positive momentum, but this was insufficient to offset dominant selling pressure.

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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

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%

31/07

1,735.78

-8.88 pts

-0.51%

Strongest up session

+39.98 pts

Sharpest down session

-17.10 pts

6-session cumulative

+36.4 pts

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 1/6

FOREIGN NET FLOW OVER SIX SESSIONS

Today -300

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

6-session cumulative net selling

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Reversal session

T-1

T-5

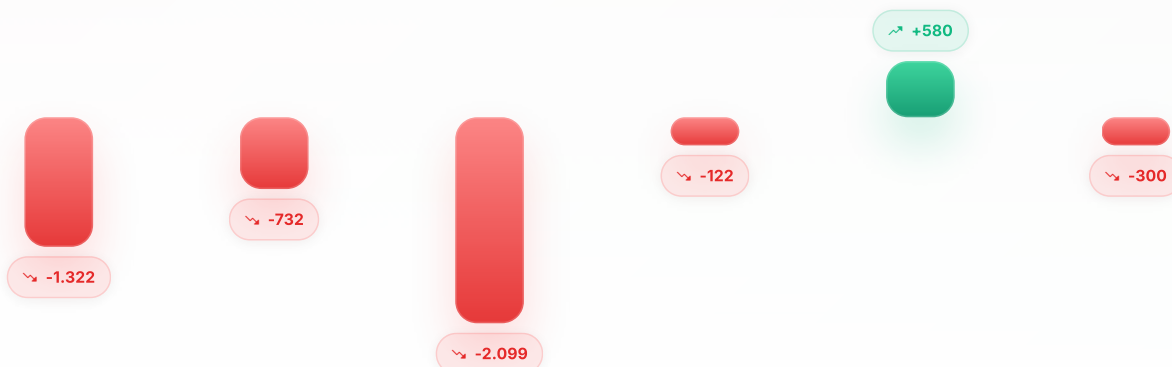
T-4

T-3

T-2

T-1

Today



Source: Algo, ASEANSC compilation

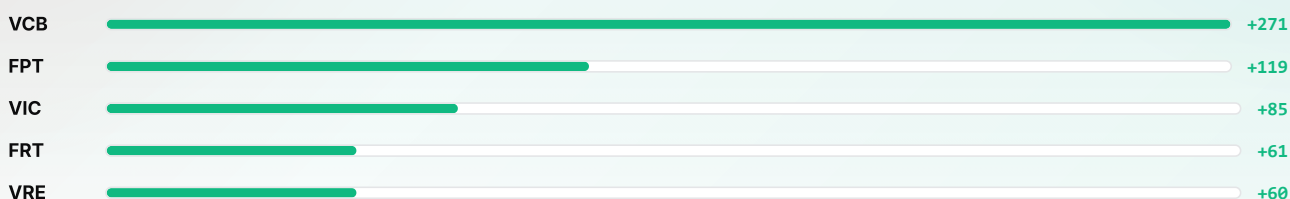
Key takeaway: foreign investors posted cumulative net selling of VND 3,995bn over six sessions, with net selling in 5 of 6 sessions.

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

TIME FRAME
July 27-31, 2026 (1 week)

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

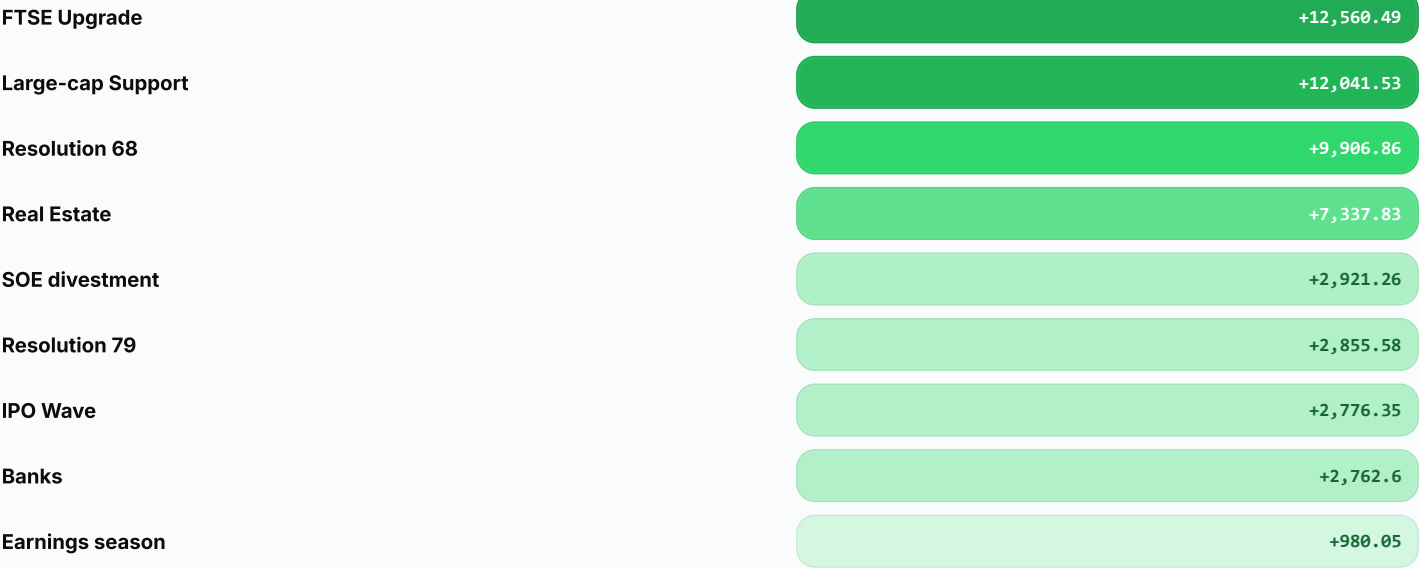
Foreign Flow Heatmap

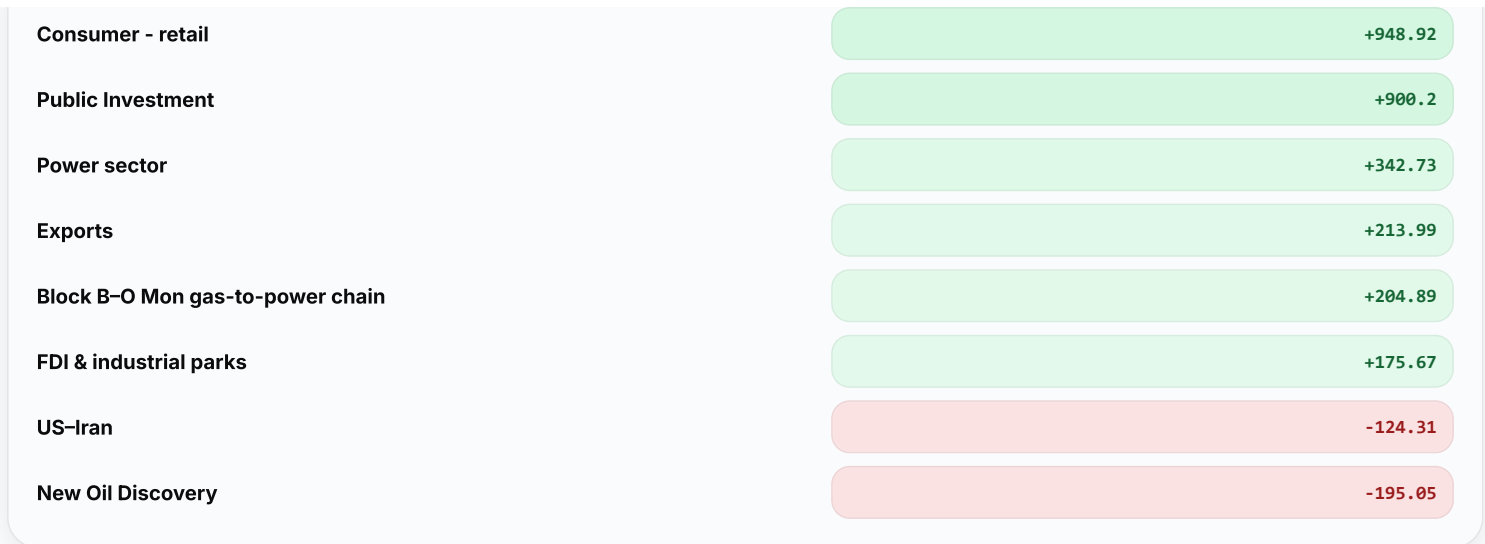
📅 1 WEEK



Domestic Flow Heatmap

📅 1 WEEK





Strong negative  Strong positive

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