08:00 AM · PRE-MARKET

MORNING BRIEF

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

Place order | Analysis Center

GLOBAL STOCK INDICES

Index	Level	+/- (%)
DJI	54,349.12	+263.24 (0.49%)
IXIC	26,363.44	-221.55 (-0.83%)
GSPC	7,723.55	-12.97 (-0.17%)
FTSE	10,909.15	+20.85 (0.19%)
GDAXI	26,137.95	+11.65 (0.04%)
FCHI	8,729.73	+60.43 (0.7%)

Sources: Investing.com, Vietstock, ASEANSC compilation

ASEAN DIGITAL SECURITIES VIDEOS

View playlists

REALTIME

Watch on YouTube

Basic Investment Knowledge

Quickly open the latest basic investment knowledge video playlist on YouTube.

REALTIME

Watch on YouTube

Market Analysis

Quickly open the latest market analysis videos on YouTube.

INTERNATIONAL NEWS

JPMorgan chief warns record margin debt: "Someone will shake the market" — JPMorgan Chase CEO Jamie Dimon warned that leverage across financial markets remains extremely high and said investors...

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

Another Fed official backs a rate hike — Fed Governor Lisa Cook said she would be prepared to support a rate increase if inflation does not continue to ease in the coming period.

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

China retaliates against U.S., tightens drone exports and bars dealings with seven U.S. entities — On August 6, China's Ministry of Commerce announced a series of new countermeasures targeting the U.S., including prohibiting domestic organizations and individuals from trading with...

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

Trump administration set to impose 15% tariff on key solar-panel materials — The Trump administration may soon announce a 15% tariff and a series of price floors for products made from...

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

Key point in proposal to reopen Strait of Hormuz between U.S. and Iran — Under a proposal being discussed by Iran and Oman to end the five-month conflict between Iran and the U.S., Iran could be granted control over...

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

U.S. signals support for stabilizing South Korean won — The U.S. Treasury has publicly addressed volatility in the won amid concerns that a weaker yen could trigger a broader wave of currency depreciation across...

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

Thailand: Inflation cools but remains under pressure from energy prices — Thailand's inflation continues to be driven mainly by domestic fuel prices that remain above year-ago levels, amid the prolonged conflict in...

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

Gold surges over 4%, tops USD4,300 — Gold prices rallied sharply on August 5 as the U.S. dollar weakened and U.S. Treasury yields declined, while investors continued to...

INTERNATIONAL NEWS | Updated at 15:26:47 · 06/08/2026

DOMESTIC NEWS

Place order

Proposal to increase funding for Lao Cai–Hanoi–Hai Phong railway project by over VND86tn

ECONOMY - INVESTMENT | 8 minutes ago

Mekolor Chairman detained after once claiming USD100bn was available for high-speed railway

ECONOMY - INVESTMENT | 34 minutes ago

Water-ionizer company fined after claiming to be "No. 1 among Vietnamese consumers"

ECONOMY - INVESTMENT | 1 hour ago

Quang Ninh and Bac Ninh meet the criteria for city status

MACRO | 2 hours ago

EuroCham: Resolution 10 strengthens confidence for European businesses to expand investment in Vietnam

MACRO | 3 hours ago

7M 2026 public investment disbursement reached only 41.9% of the Prime Minister's plan

ECONOMY - INVESTMENT 06/08 09:37 7M 2026 PUBLIC INVESTMENT DISBURSEMENT REACHED ONLY 41.9% OF THE PRIME MINISTER'S PLAN. ACCORDING | 31/7/2026

TO THE MINISTRY OF FINANCE, DISBURSEMENT FROM THE BEGINNING OF THE YEAR THROUGH THE END OF THE DAY

CORPORATE NEWS

Place order

Following Vingroup tie-up, Pomina revenue nearly quadruples YoY but losses persist — Pomina Steel JSC (UPCoM: POM) recorded a sharp increase in Q2 2026 revenue after partially restoring production and expanding transactions with the group...

CORPORATE NEWS | Updated at 15:26:47 · 06/08/2026

PNJ calls extraordinary GMS to revise business plan — On the evening of August 5, the Board of Directors of Phu Nhuan Jewelry JSC (HOSE: PNJ) cancelled its written-consultation plan and opted instead to convene an extraordinary GMS...

CORPORATE NEWS | Updated at 15:26:47 · 06/08/2026

Rich stream of dividends from Vietnam's dairy companies — Vietnam's dairy sector is moving beyond scale-driven growth to focus on value enhancement. In the stock market, shareholders of leading names such as...

CORPORATE NEWS | Updated at 15:26:47 · 06/08/2026

PNJ, DGC and PC1: Three legal cases, three different levels of damage — From March to July 2026, investigators prosecuted senior executives at several major listed companies, triggering near-panic sell-offs...

CORPORATE NEWS | Updated at 15:26:47 · 06/08/2026

Ha Long Canned Food posts record Q2 loss, seeks to cut borrowings — Ha Long Canned Food JSC (HNX: CAN) posted the largest quarterly loss in its history in Q2 2026, marking a third consecutive loss-making quarter following the pig-disposal scandal...

CORPORATE NEWS | Updated at 15:26:47 · 06/08/2026

Tungsten rises nearly sixfold in one year: What is changing in the materials market? — Over the past 12 months, APT tungsten prices have risen nearly sixfold, significantly outpacing many traditional metals. This is not simply a price rally in...

CORPORATE NEWS | Updated at 15:26:47 · 06/08/2026

EVENT CALENDAR

Upcoming corporate and macro events

09/2026
22

FT1

Cash dividend of VND4,407/share

Dividend

10/2026
15

VDT

Cash dividend of VND800/share

Dividend

08/2026
28

DQC

Cash dividend of VND500/share

Dividend

09/2026
11

DNA

Cash dividend of VND1,500/share

Dividend

08/2026 25	NQB Cash dividend of VND400/share Dividend
09/2026 30	PTB Cash dividend of VND1,000/share Dividend

12:00 PM · MID-SESSION

MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

Place order | Analysis Center

	VN-INDEX	VN30	HNX-INDEX
Value	1,764.78	1,902.79	292.64
%	-0.66%	-0.74%	-0.32%
CHANGE	-11.68 pts	-14.09 pts	-0.95 pts
TRADING VALUE	12,459.3 VND bn | -4,070.3 VND bn (-24.62%)	7,442.2 VND bn | -2,335.1 VND bn (-23.88%)	498.6 VND bn | -279.7 VND bn (-35.94%)
Gainers	107	3	
Unchanged	50	2	
Decliners	211	25	

MARKET MOVEMENT

VN-Index closed down nearly 12 pts as selling pressure continued to build from the start of the afternoon session, pushing the index to finish at the lower end of the day's range and fully reversing the intraday recovery attempt. Market breadth deteriorated sharply, with 211 decliners on HOSE, while the VN30 weakened broadly as 25 of 30 constituents closed lower. Selling pressure spread across key sectors including Industrial Parks, Construction, Power and Aviation, while the isolated strength in Ports was insufficient to alter the overall market direction. Investor caution was also reflected in a marked decline in liquidity, while foreign investors returned to net selling of VND97bn, concentrated in large-cap names such as VHM, VPB and PNJ. Overall, the session lacked meaningful upward catalysts and showed that buyers had yet to regain a balanced position.

MARKET VIEW

VN-Index is sending a neutral signal after closing at 1,765 pts. Although the index remains above the MA10 and MA20, stronger late-session selling pressure and MFI weakening to 42 indicate that supply is gaining the upper hand in the near term. With RSI at 49, the market is likely to remain range-bound around 1,760–1,770 before establishing a clearer trend. Short-term investors should therefore maintain a moderate equity allocation, avoid chasing rebounds and trade within the 1,760–1,790 range, while prioritizing sectors supported by idiosyncratic catalysts such as State divestments, the market-upgrade roadmap or the offshore oil & gas cycle. For medium- and long-term strategies, pullbacks toward support provide opportunities for gradual accumulation in fundamentally sound, liquid stocks across Banks, Securities, Retail, Public Investment and Oil & Gas.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 4/6

FOREIGN NET FLOW OVER SIX SESSIONS

Today -97

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

Cumulative net buying over six sessions	+2.656
Widest swing	+1.055
Reversal session	T-1

Source: Algo, ASEANSC compilation

Key takeaway: foreign investors recorded cumulative net buying of VND2.656tn over six sessions, with net buying in 4 of 6 sessions.

FLOW LEADERS

TOP FOREIGN TRADES

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

TOP 5 NET BOUGHT

VIC	+229
CTG	+54
HPG	+45
VCB	+40
GMD	+34

TOP 5 NET SOLD

VHM	-231
VPB	-121
PNJ	-49
ACB	-40
TCB	-30

15:30 PM · MARKET CLOSE

MARKET CLOSE

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

Place order | Analysis Center

INDEX SUMMARY

	VN-INDEX	VN30	HNX-INDEX
Index	1,764.78	1,902.79	292.64
%	-0.66%	-0.74%	-0.32%
CHANGE	-11.68 pts	-14.09 pts	-0.95 pts
TRADING VALUE	12,459.3 VND bn | -4,070.3 VND bn (-24.62%)	7,442.2 VND bn | -2,335.1 VND bn (-23.88%)	498.6 VND bn | -279.7 VND bn (-35.94%)
Gainers	107	3	
Unchanged	50	2	
Decliners	211	25	

MARKET MOVEMENT

VN-Index closed down nearly 12 pts as selling pressure continued to build from the start of the afternoon session, pushing the index to finish at the lower end of the day's range and fully reversing the intraday recovery attempt. Market breadth deteriorated sharply, with 211 decliners on HOSE, while the VN30 weakened broadly as 25 of 30 constituents closed lower. Selling pressure spread across key sectors including Industrial Parks, Construction, Power and Aviation, while the isolated strength in Ports was insufficient to alter the overall market direction. Investor caution was also reflected in a marked decline in liquidity, while foreign investors returned to net selling of VND97bn, concentrated in large-cap names such as VHM, VPB and PNJ. Overall, the session lacked meaningful upward catalysts and showed that buyers had yet to regain a balanced position.

MARKET VIEW

VN-Index is sending a neutral signal after closing at 1,765 pts. Although the index remains above the MA10 and MA20, stronger late-session selling pressure and MFI weakening to 42 indicate that supply is gaining the upper hand in the near term. With RSI at 49, the market is likely to remain range-bound around 1,760–1,770 before establishing a clearer trend. Short-term investors should therefore maintain a moderate equity allocation, avoid chasing rebounds and trade within the 1,760–1,790 range, while prioritizing sectors supported by idiosyncratic catalysts such as State divestments, the market-upgrade roadmap or the offshore oil & gas cycle. For medium- and long-term strategies, pullbacks toward support provide opportunities for gradual accumulation in fundamentally sound, liquid stocks across Banks, Securities, Retail, Public Investment and Oil & Gas.

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

Date	Close	Change (pts)	Change (%)
30/07	1,744.66	+39.98 pts	+2.35%
31/07	1,735.78	-8.88 pts	-0.51%
03/08	1,762.84	+27.06 pts	+1.56%
04/08	1,777.23		
05/08	1,776.46		
06/08	1,764.78		

+14.39 pts	+0.82%

-0.77 pts	-0.04%

-11.68 pts	-0.66%

Strongest up session	+39.98 pts
Sharpest down session	-11.68 pts
6-session cumulative	+60.1 pts

FOREIGN FLOW SPOTLIGHT

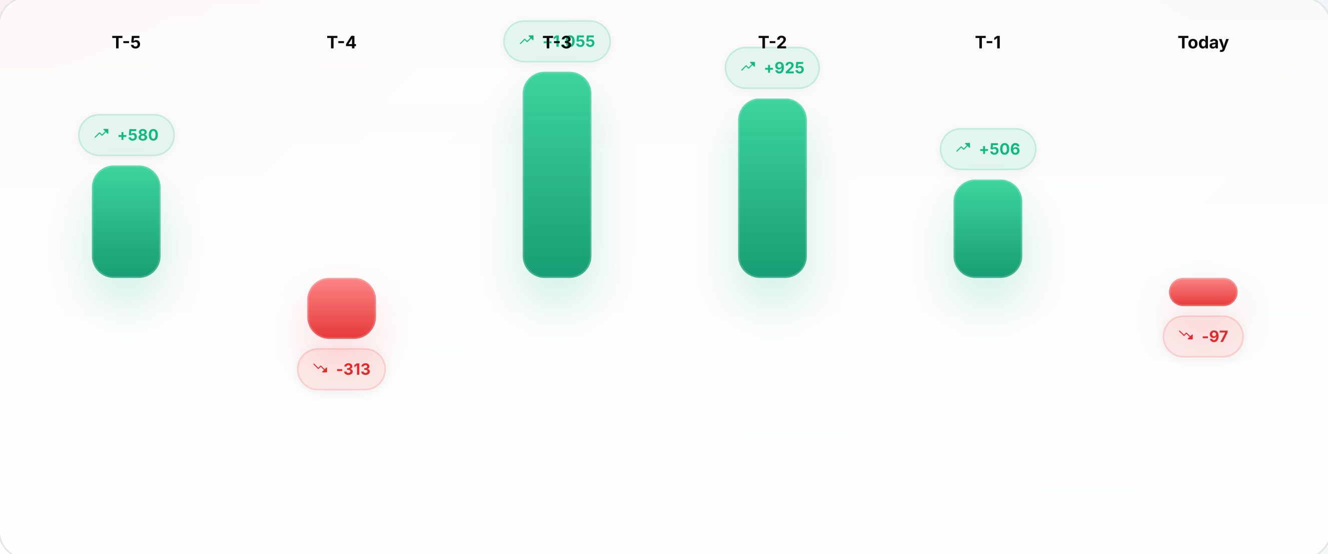
Net-buying sessions 4/6

Today -97

FOREIGN NET FLOW OVER SIX SESSIONS

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

Cumulative net buying over six sessions	+2.656
Widest swing	+1.055
Reversal session	T-1



Source: Algo, ASEANSC compilation

Key takeaway: foreign investors recorded cumulative net buying of VND2.656tn over six sessions, with net buying in 4 of 6 sessions.

FLOW LEADERS

TOP FOREIGN TRADES

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

TOP 5 NET BOUGHT

VIC	+229
CTG	+54
HPG	+45
VCB	+40
GMD	+34

TOP 5 NET SOLD

VHM	-231
VPB	-121
PNJ	-49
ACB	-40
TCB	-30

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
July 31–August 6, 2026 (1 week)

Place order

Research Center

Foreign Flow Heatmap

1 WEEK

Large-cap support	+1,502.08
SOE divestment	+848.5
Resolution 79	+783.7
FTSE upgrade	+776.62
Resolution 68	+494.12
Consumer & Retail	+428.69
Public investment	+323.48
Earnings season	+314.42
Banks	+276.65
New oil discovery	+32.07
U.S.–Iran	-33.98
Exports	-45.69
FDI & industrial parks	-97.15
Power sector	-99.17
IPO wave	-99.69
Real Estate	-103.56
Block B–O Mon gas-to-power chain	-171.26

Domestic Flow Heatmap

1 WEEK

Banks	+811.58
SOE divestment	+716.01
Resolution 79	+673.09

Earnings season	+577.76
IPO wave	+487.86
Exports	+224.9
FDI & industrial parks	+99.07
Power sector	-305.46
U.S.–Iran	-588.13
Block B–O Mon gas-to-power chain	-616.44
Resolution 68	-661.59
New oil discovery	-662.03
Consumer & Retail	-681.41
Real Estate	-706.68
Large-cap support	-1,175.31
Public investment	-1,233.36
FTSE upgrade	-3,161.33

Strong negative — Strong positive

DISCLAIMER

This market report contains subjective views and is based on information sources deemed reliable and on careful, detailed analysis. ASEANSC does not guarantee the absolute accuracy or completeness of these information sources. This report is prepared solely for informational purposes and does not constitute any specific securities trading offer, solicitation or instruction. Investors should use this report as a reference when making investment decisions and are fully responsible for their own investment decisions. Our views and estimates are valid as of the report date and may change without prior notice. This report is copyrighted by ASEANSC. Any reproduction, distribution or modification without ASEANSC's consent is prohibited.

ASEAN SECURITIES CORPORATION

Website: www.aseansc.com.vn

HEAD OFFICE

Floors 4, 5, 6, 7 – No. 3 Dang Thai Than,
Cua Nam Ward, Hanoi.

Tel: 024 6275 8668

Order hotline: **024 6275 8888**

HO CHI MINH CITY BRANCH

2nd Floor – No. 77–79 Pho Duc Chinh,
Ben Thanh Ward, Ho Chi Minh City.

Tel: 028 3933 0308

Order hotline: **028 3933 0309**

DOWNLOAD APP NOW