ASEAN SECURITIES
CÔNG TY CỔ PHẦN CHỨNG KHOÁN ASEAN

ENGLISH | VIETNAMESE

MORNING BRIEF | EVENT CALENDAR | MID-SESSION UPDATE | AFTERNOON BRIEF | DOMESTIC & FOREIGN FLOWS

26/08/2026 20:

08:00 AM · PRE-MARKET

MORNING BRIEF

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

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GLOBAL STOCK INDICES

Index	Level	+/- (%)
DJI	53,577.40	+160.24 (0.3%)
IXIC	26,151.30	+171.11 (0.66%)
GSPC	7,677.28	+24.42 (0.32%)
FTSE	10,881.57	-4.59 (-0.04%)
GDAXI	26,244.57	-21.57 (-0.08%)
FCHI	8,475.94	+36.74 (0.44%)

Sources: Investing.com, Vietstock, ASEANSC compilation

ASEAN DIGITAL SECURITIES VIDEOS

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INTERNATIONAL NEWS

ECB likely to raise interest rates in September — In June, the European Central Bank raised interest rates for the first time in nearly three years, seeking to contain the risk of higher energy prices amid geopolitical conflict...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

US prepares largest visa revocation campaign in history, potentially affecting 200,000 people — The Trump administration is preparing to revoke work and tourist visas for as many as 200,000 foreign nationals who have applied or...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

US considers additional trade measures after Canada retaliates — Washington is considering additional trade measures after Canada announced retaliatory tariffs on US goods amid escalating tensions...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

US pauses processing of immigrant visa applications — The Trump administration has suspended processing of immigrant visa applications worldwide to roll out an "intensive training" programme for...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

IMF warns developing economies risk falling behind in AI — IMF leadership said the global economy is benefiting from a surge in Artificial Intelligence investment, particularly in countries participating...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

Tensions escalate as Canada imposes retaliatory tariffs on USD20bn of US goods — On August 25, Canada announced retaliatory tariffs on the US, applying a "dollar-for-dollar" response to the 50% tariff imposed by President Donald Trump...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

US consumer confidence falls to a seven-month low — On August 25, the Conference Board said its US consumer confidence index declined from 90.2 in July to 89.4...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

Global gold holds near a three-month high — Gold prices edged lower on August 25 but remained near their highest level in more than three months, supported by a weaker US dollar and planned purchases...

INTERNATIONAL NEWS | Updated at 20:44:13 · 26/08/2026

DOMESTIC NEWS

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Prime Minister urges Chinese companies to shift investment toward quality and technology

ECONOMY - INVESTMENT | 49 minutes ago

EnCity expert: Planning is only part of the equation; infrastructure is the real driver of urban development

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Deputy PM calls for substantive solutions to difficulties facing agriculture and environmental businesses

NEWS | Today

HCMC Party Committee calls for urgent implementation of the Urban Development Law

NEWS | Today

Vietnam's economy approaches a shift in its growth model

Mega-cities, mega-opportunities: From spatial expansion to stronger corporate capabilities

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CORPORATE NEWS

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BIDV Insurance sets record date for more than VND240bn dividend payment — BIDV Insurance Corporation (HOSE: BIC) announced the record date for its 2025 dividend, with the ex-dividend date set for...

CORPORATE NEWS | Updated at 20:44:13 · 26/08/2026

Reuters: Two foreign institutions in talks to acquire 15% of Techcombank in a deal potentially worth USD2bn — France's BNP Paribas and South Korea's KB Kookmin Bank are separately negotiating to acquire at least a 15% stake in Techcombank (HOSE: TCB) as strategic investors...

CORPORATE NEWS | Updated at 20:44:13 · 26/08/2026

Nearly VND972bn of bond proceeds fully deployed into LDG Sky; Dai Thinh Phat delays both principal and interest payments — Dai Thinh Phat Construction Investment JSC (DPJC) still has two outstanding bond lots with a combined issued face value of VND971.7bn. As of June 30, 2026, the company...

CORPORATE NEWS | Updated at 20:44:13 · 26/08/2026

Novaland subsidiary spends more than VND430bn on early bond redemption — No Va Real Estate Investment JSC (NVJC) has repurchased more than VND436bn of bonds ahead of maturity since early August, reducing the outstanding balance of one bond lot to zero. However, the company...

CORPORATE NEWS | Updated at 20:44:13 · 26/08/2026

How did petroleum companies perform as oil prices gradually cooled? — Fuel prices were highly volatile in 1Q26 as escalating conflict involving the US, Israel and Iran disrupted supply through the strait...

CORPORATE NEWS | Updated at 20:44:13 · 26/08/2026

BCM establishes VND1,455bn company to develop Vinh Lap Industrial Park — BCM's Board of Directors approved the establishment of a company with charter capital of VND1,455bn to invest in infrastructure development for Vinh Lap Industrial Park - Phase 1.

CORPORATE NEWS | Updated at 20:44:13 · 26/08/2026

EVENT CALENDAR

Upcoming corporate and macro events

Date	Ticker	Event	Type
09/2026 22	DNN	Cash dividend of VND1,000/share	Dividend
10/2026 15	SZE	Cash dividend of VND400/share	Dividend
09/2026 29	HUB	Cash dividend of VND1,000/share	Dividend
10/2026 09	VAV	Cash dividend of VND500/share	Dividend
10/2026 08	HHN	Cash dividend of VND500/share	Dividend
10/2026 08	NJC	Cash dividend of VND1,500/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	VN30	HNX-INDEX
Index	1,821.32	1,970.01	281.96
%	+1.67%	+1.75%	-0.24%
CHANGE	+29.91 pts	+33.86 pts	-0.69 pts
TRADING VALUE	16,387.9 VND bn | -1,090.9 VND bn (-6.24%)	10,847.2 VND bn | +969.1 VND bn (+9.81%)	783.2 VND bn | -51.5 VND bn (-6.17%)
Gainers	182	25	
Unchanged	68	3	
Decliners	125	2	

MARKET MOVEMENT

VN-Index delivered a strong session, sustaining gains throughout the day and closing at the intraday high, up 29.91 points, confirming a clear dominance of buying momentum. Market breadth improved markedly, with 25/30 VN30 constituents and 182 HOSE stocks advancing, led by strong moves in Industrial Park Real Estate, Oil & Gas, Aviation and Real Estate. Foreign investors provided additional support with net buying of VND37bn, concentrated in large-cap names such as FPT, TCB and PNJ, further strengthening market sentiment. Although liquidity eased slightly, reflecting some investor caution amid corrections in selected stocks, the index still closed above its intraday average, indicating that active demand remains supportive and providing a constructive backdrop for the prevailing uptrend.

MARKET VIEW

VN-Index is convincingly reinforcing its short-term uptrend after closing at 1,821 points, firmly above the MA10 and MA20, with momentum indicators also supportive as RSI reached 63 and MFI 66. With the index closing near the session high and buying pressure remaining dominant, we expect the market to maintain its upward momentum and test resistance at 1,840–1,850 points in the next session. Under this constructive scenario, short-term investors should prioritise buying on pullbacks rather than chasing prices, while taking partial profits near resistance and only increasing exposure on a confirmed breakout accompanied by stronger liquidity; sectors with idiosyncratic catalysts such as State divestment, the market-upgrade roadmap and the offshore cycle should remain key magnets for capital. Medium- to long-term investors may use volatility toward support zones to gradually accumulate leading names in Banking, Securities, Retail, Technology and Public Investment, where fundamentals remain solid and valuations attractive.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions **4/6**

Today **+26**

FOREIGN NET FLOW OVER SIX SESSIONS

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

Six-session cumulative net selling	-706
Largest swing	-732
Reversal session	Today

Source: Algo, ASEANSC compilation

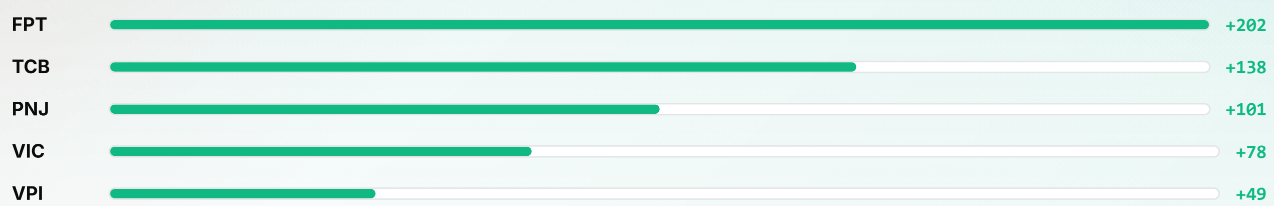
Key highlight: foreign investors recorded cumulative net selling of VND706bn over six sessions, with net selling in 2/6 sessions.

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


CTG
-77
ACB
-77
VHM
-60
VCB
-58
STB
-54

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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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 (%)
19/08	1,726.69	-5.33 pts	-0.31%
20/08	1,734.24	+7.55 pts	+0.44%
21/08	1,768.12	+33.88 pts	+1.95%
24/08	1,788.78	+20.66 pts	+1.17%
25/08	1,791.41	+2.63 pts	+0.15%
26/08	1,821.32	+29.91 pts	+1.67%

Strongest up session +33.88 pts

Sharpest down session -5.33 pts

6-session cumulative +89.3 pts

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 4/6

FOREIGN NET FLOW OVER SIX SESSIONS

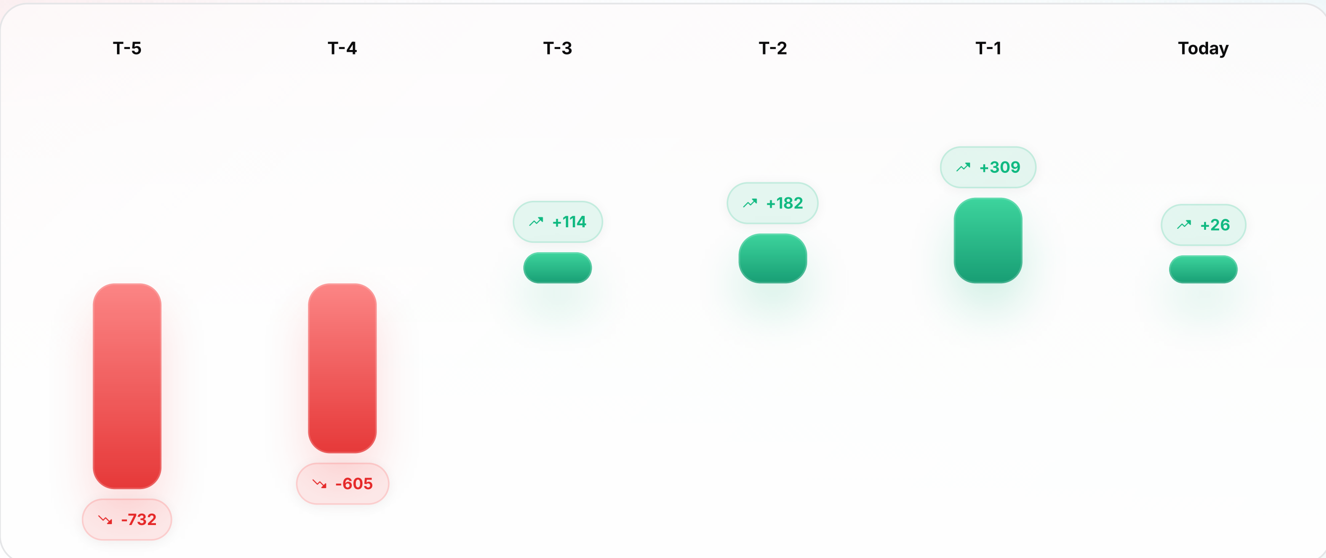
Today +26

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

Six-session cumulative net selling -706

Largest swing -732

Reversal session Today



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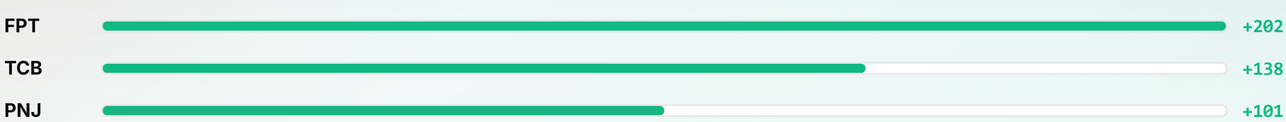
TOP 5 NET BOUGHT



VIC		+78
VPI		+49

TOP 5 NET SOLD

CTG		-77
ACB		-77
VHM		-60
VCB		-58
STB		-54

MONEY FLOW · HEATMAP

DOMESTIC & FOREIGN FLOW HEATMAP

TIME FRAME
20/08/2026 – 26/08/2026 (1 week)

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Research Center

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

Foreign Flow Heatmap

1 WEEK

Consumer & Retail	+342.17
IPO wave	+270.79
Resolution 68	+211.7
Real Estate	+56.15
Public Investment	+9.45
Exports	-59.88
Power sector	-100.22
FDI & industrial parks	-107.38
Earnings season	-179.25
Large-cap support	-190.11
Block B–O Mon gas-to-power chain	-204.42
FTSE upgrade	-226.22

New oil discovery	-252.09
U.S.–Iran	-342.82
Banks	-852.99
Resolution 79	-955.18
SOE divestment	-979.32

Domestic Flow Heatmap

1 WEEK

Resolution 68	+10,524.82
FTSE upgrade	+9,739.1
Banks	+7,557.33
Large-cap support	+7,115.53
IPO wave	+6,907.07
SOE divestment	+3,267.99
Resolution 79	+3,248
Real Estate	+2,622.06
Consumer & Retail	+2,090.75
U.S.–Iran	+1,732.36
New oil discovery	+1,342.25
Block B–O Mon gas-to-power chain	+1,259.58
Public Investment	+906.45
Exports	+450.99
Earnings season	+381.24
FDI & industrial parks	+330.4
Power sector	-20.59

Strong negative Strong positive

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