

🕒 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	53,885.10	-464.02 (-0.85%)
IXIC	26,348.35	-15.09 (-0.06%)
GSPC	7,709.96	-13.59 (-0.18%)
FTSE	10,886.22	+18.33 (0.17%)
GDAXI	26,266.25	+126.12 (0.48%)
FCHI	8,725.68	+25.97 (0.3%)

Sources: Investing.com, Vietstock, ASEANSC compilation

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Market Analysis

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🌐 INTERNATIONAL NEWS



China's exports rise 23% in July, beating forecasts — China's exports continued to grow strongly in July 2026, exceeding analyst expectations despite a slower pace than the previous month, supported by...

INTERNATIONAL
NEWS

Updated at 15:31:57 ·
07/08/2026



U.S.-Japan coordination could reshape global currency markets — Unprecedented coordination between the U.S. and Japan to support the yen could drive lasting changes in how global currency markets operate.

INTERNATIONAL
NEWS

Updated at 15:31:57 ·
07/08/2026



U.S. mortgage rates rise to highest level since last July — U.S. mortgage rates increased for a fifth consecutive week, further weakening home-buying prospects for many potential buyers who have remained on the sidelines...

INTERNATIONAL
NEWS

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Global gold prices rise for a fourth consecutive session — Gold climbed to a seven-week high on August 6, extending gains for a fourth straight session amid expectations that the Strait of Hormuz could reopen soon...

INTERNATIONAL
NEWS

Updated at 15:31:57 ·
07/08/2026



Oil prices rebound nearly 4% following Iran's move — Oil prices rallied sharply on August 6 after Iranian state media published draft regulations imposing stricter conditions...

INTERNATIONAL
NEWS

Updated at 15:31:57 ·
07/08/2026



Dow Jones reverses course, falling more than 460 points — Major Wall Street indices declined on August 6 as investors continued to monitor developments in the Middle East, particularly...

INTERNATIONAL
NEWS

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IMF: Japan continues monetary-policy normalization — The IMF said Japan is undergoing a highly important long-term transition, with structural reforms initiated under the late Prime Minister...

INTERNATIONAL
NEWS

Updated at 15:31:57 ·
07/08/2026



China launches global tax-recovery campaign, reviewing records dating back more than 20 years — China is rolling out a large-scale tax-recovery campaign targeting the ultra-wealthy, reviewing unpaid taxes on offshore investments dating back...

INTERNATIONAL
NEWS

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07/08/2026

DOMESTIC NEWS

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New U.S. tariffs add pressure on Vietnam's seafood sector

ECONOMY - INVESTMENT | 7 minutes ago



FTA Index launch ceremony expected on August 18

ECONOMY - INVESTMENT | 16 minutes ago



Key criteria approved for roadmap to restructure State capital in enterprises

ECONOMY - INVESTMENT | 3 hours ago



Proposal to decentralize institutional framework development for special municipalities

MACRO | 4 hours ago



Digital financial infrastructure: the foundation shaping the competitiveness of Vietnam's International Financial Center

NEWS | Today



Vietnam partners with global visa major to promote tourism worldwide

NEWS | Today



BIDV sets record date to issue more than 498mn shares, raising charter capital to nearly VND77.8tn — Bank for Investment and Development of Vietnam (BIDV, HOSE: BID) announced a share issuance to increase charter capital from owners' equity...

CORPORATE NEWS | Updated at 15:31:57 · 07/08/2026



MIK Group expands south with Imperia Sensa, integrating family company into its ecosystem — After several years away from the HCMC market, MIK Group has officially returned with the Imperia Sensa project, developed on land in the My Phu residential area...

CORPORATE NEWS | Updated at 15:31:57 · 07/08/2026



Vinamilk not considering price hikes; fresh-milk supply secured through 2028 — Vinamilk management said 1H26 growth was driven by product-mix improvement, market-share expansion and distribution-system restructuring...

CORPORATE NEWS | Updated at 15:31:57 · 07/08/2026



EVS Securities set for another CEO change due to health reasons — Mr. Nguyen Thanh Hai has tendered his resignation as CEO and legal representative of EVS Securities for health reasons after more than 18 months leading the company...

CORPORATE NEWS | Updated at 15:31:57 · 07/08/2026



NRC still owes over VND100bn in taxes; shares nearly halve after Mr. Do Thanh Nhan's appearance — In 1H26, the company chaired by Mr. Le Thong Nhat paid just over VND2bn in taxes. At end-2Q26, outstanding obligations to the State still exceeded VND100bn...

CORPORATE NEWS | Updated at 15:31:57 · 07/08/2026



Ownership reshuffle at Khang Dien's Binh Trung Moi project — Khang Dien's nearly VND900bn of financial income in 2Q26 did not come from the sale of a 2% stake in Binh Trung Moi. Instead...

CORPORATE NEWS | Updated at 15:31:57 · 07/08/2026



EVENT CALENDAR

Upcoming corporate and macro events

09/2026
25

SNC

Cash dividend of VND1,200/share

Dividend

08/2026
27

GMX

Cash dividend of VND500/share

Dividend

09/2026
09

HRB

Cash dividend of VND3,000/share

Dividend

09/2026
15

NNC

Cash dividend of VND1,000/share

Dividend

09/2026
22

FT1

Cash dividend of VND4,407/share

Dividend

09/2026
29

HAT

Cash dividend of VND3,000/share

Dividend



MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

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VN-INDEX

1,768.06

+0.19%

CHANGE

+3.28 pts

TRADING
VALUE14,516.9 VND bn |
+1,863.0 VND bn
(+14.72%)

Gainers

164

Unchanged

62

Decliners

139

VN30

1,911.09

+0.44%

CHANGE

+8.3 pts

TRADING
VALUE9,610.0 VND bn |
+2,188.7 VND bn
(+29.49%)

Gainers

18

Unchanged

2

Decliners

10

HNX-INDEX

293.44

+0.27%

CHANGE

+0.8 pts

TRADING
VALUE630.3 VND bn | +124.7
VND bn (+24.67%)

Gainers

Unchanged

Decliners

MARKET MOVEMENT

VN-Index pared its gain to just over 3 pts following late-session volatility, but still closed above the day's average price, indicating that buying demand remained dominant. The market stayed clearly differentiated for most of the session as investors adopted a cautious exploratory stance; however, sentiment improved materially as liquidity rebounded sharply versus the previous session. Gains broadened to 164 stocks on HOSE, led by 18 of 30 VN30 constituents, while strong advances in Industrial Parks, Oil & Gas and Fertilizers & Chemicals provided key support to the index. Nevertheless, corrective pressure in selected large-cap stocks, together with VND765bn of foreign net selling concentrated in VHM, TCB and VPB, continued to cap upside and underscored the need for greater stock selectivity while cash flow remains short of full consensus.

MARKET VIEW

VN-Index is showing a cautious recovery signal after closing at 1,768 pts, holding above the MA10 and MA20 with buying demand dominant during the session. However, RSI(14) remained neutral at 50 while MFI weakened to 43, indicating that momentum is still insufficiently broad to confirm a sustainable uptrend. Our base case for the next session is continued range-bound trading before a clearer trend emerges. Short-term investors should therefore maintain a moderate equity allocation, avoid chasing strength and trade within the 1,760–1,790 range, while prioritizing stocks with idiosyncratic catalysts such as State divestment, the market-upgrade roadmap, economic-development resolutions or the offshore oil & gas cycle. For medium- and long-term strategies, staged accumulation on pullbacks toward support zones remains preferred, focusing on fundamentally sound and liquid names in Banking, Securities, Retail, Public Investment and Oil & Gas.

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 3/6

Today -757

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 +1.308

Widest swing

+1.055

Reversal session

T-2

T-5

T-4 55

T-3

+925

T-2

T-1

Today



Source: Algo, ASEANSC
compilation

Key takeaway: foreign investors recorded cumulative net buying of VND1.308tn over six sessions, with net buying in 3 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



15:30 PM · MARKET CLOSE



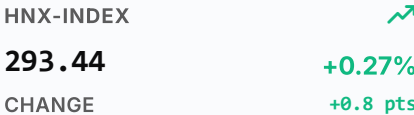
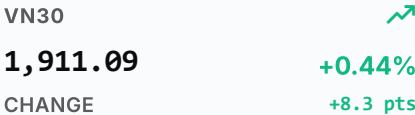
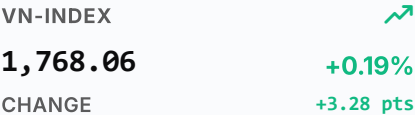
MARKET CLOSE

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

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INDEX SUMMARY



TRADING 14,516.9 VND bn | +1,863.0
VALUE VND bn (+14.72%)

Gainers
164

Unchanged
62

Decliners
139

TRADING 9,610.0 VND bn | +2,188.7
VALUE VND bn (+29.49%)

Gainers 18

Unchanged
2

Decliners
10

TRADING 630.3 VND bn | +124.7 VND
VALUE bn (+24.67%)

Gainers

Unchanged

Decliners

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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

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

+14.39 pts

+0.82%

05/08

1,776.46

-0.77 pts

-0.04%

06/08

1,764.78

-11.68 pts

-0.66%

07/08

1,768.06

+3.28 pts

+0.19%

Strongest up session

+27.06 pts

Sharpest down session

-11.68 pts

6-session cumulative

+23.4 pts

FOREIGN FLOW SPOTLIGHT

Net-buying sessions 3/6

FOREIGN NET FLOW OVER SIX SESSIONS

Today -757

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

Cumulative net buying over six sessions **+1.308**

Widest swing

+1.055

Reversal session

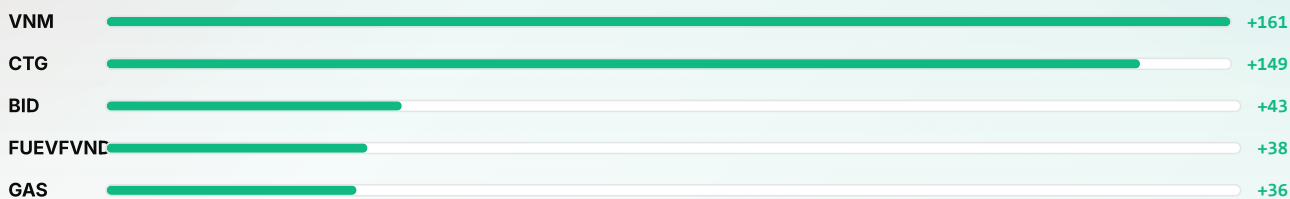
T-2

Source: Algo, ASEANSC compilation

Key takeaway: foreign investors recorded cumulative net buying of VND1.308tn over six sessions, with net buying in 3 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

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

TIME FRAME

August 3–7, 2026 (1 week)



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Foreign Flow Heatmap

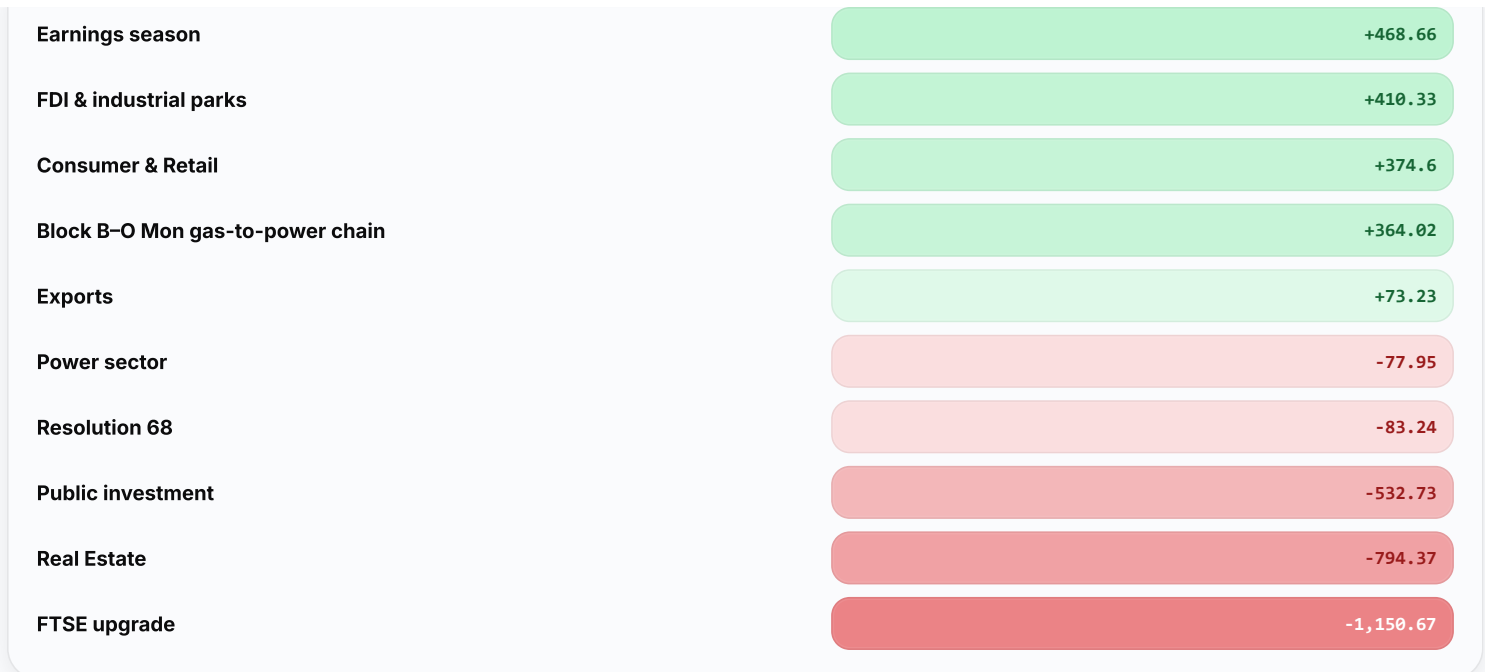
1 WEEK

Large-cap support	+1,161.81
SOE divestment	+795.89
Resolution 79	+726.37
FTSE upgrade	+627.48
Consumer & Retail	+499.26
Earnings season	+437.84
Public investment	+387.94
Resolution 68	+105.68
New oil discovery	+77.07
Exports	-3.95
U.S.–Iran	-20.08
Banks	-51.22
Power sector	-53.84
IPO wave	-68.05
Real Estate	-74.72
Block B–O Mon gas-to-power chain	-112.39
FDI & industrial parks	-133.6

Domestic Flow Heatmap

1 WEEK

Banks	+2,786.75
SOE divestment	+2,020.15
Resolution 79	+1,974.97
IPO wave	+1,832.9
U.S.–Iran	+1,374.5
Large-cap support	+1,230.24
New oil discovery	+1,098.03



Strong negative  Strong positive



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