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	53,791.85	-184.13 (-0.34%)
IXIC	26,445.45	-159.91 (-0.6%)
GSPC	7,728.20	-24.91 (-0.32%)
FTSE	10,829.11	-15.08 (-0.14%)
GDAXI	26,423.76	+32.34 (0.12%)
FCHI	8,690.75	-24.19 (-0.28%)

Sources: Investing.com, Vietstock, ASEANSC compilation

ASEAN DIGITAL SECURITIES VIDEOS

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INTERNATIONAL NEWS

Chinese Humanoid Robot Company's IPO Oversubscribed 5,500 Times — Chinese retail investors are scrambling to buy shares in one of the country's leading humanoid robotics companies, highlighting exceptionally strong investor demand...

INTERNATIONAL NEWS | Updated at 15:57:22 · 12/08/2026

Will Tonight's US CPI Report Determine Whether the Fed Raises Rates in September? — The key inflation report due on August 12 (Vietnam time) could give the US Federal Reserve (Fed) additional room in its fight against...

INTERNATIONAL NEWS | Updated at 15:57:22 · 12/08/2026

Panama Canal Transit Fees Surge 16-Fold to Record High — Transit fees on one of the world's busiest shipping routes through the Panama Canal have hit a record high as water levels fall due to El Niño and shipping demand...

INTERNATIONAL NEWS | Updated at 15:57:22 · 12/08/2026

Airbus Widens Lead over Boeing in Commercial Aircraft Order Race — In July, Boeing secured 38 new orders, including 18 narrow-body 737 aircraft and 20 wide-body jets, while Airbus received as many as 204 orders...

INTERNATIONAL NEWS | Updated at 15:57:22 · 12/08/2026

Global Gold Hovers Near Two-Month High Ahead of Inflation Data — Gold traded flat on August 11 after touching its highest level in more than two months earlier in the session, as investors awaited US inflation data for...

INTERNATIONAL NEWS | Updated at 15:57:22 · 12/08/2026

Brent Oil Nears USD89/bbl — Oil prices rose on August 11 after a senior Iranian official said the Strait of Hormuz would not reopen until Washington meets...

INTERNATIONAL NEWS | Updated at 15:57:22 · 12/08/2026

S&P 500 Falls for Second Consecutive Session — The S&P 500 declined on August 11 as investor expectations for an early reopening of the Strait of Hormuz faded, adding to persistent concerns...

INTERNATIONAL NEWS | Updated at 15:57:22 · 12/08/2026

China Posts Strongest Monthly Gold Buying in Nearly Three Years — In addition to buying gold for 21 consecutive months, the People's Bank of China (PBOC) continued to use price pullbacks to increase...

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DOMESTIC NEWS

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Deputy PM: No Avoidance or Buck-Passing; Resolve Businesses' Bottlenecks Substantively

MACRO | 59 minutes ago

Construction Minister: Localities Should Cut Small Projects and Focus on Regional Connectivity Projects

ECONOMY - INVESTMENT | 1 hour ago

Ministry of Industry and Trade Establishes 49-Member Task Force to Draft Power-Sector Restructuring Plan

ECONOMY - INVESTMENT | 3 hours ago

New Financial Mechanism for Strategic Technology Development Tasks

NEWS | Today

Vietnam Targets AI Skills Training for at Least 10mn Workers

Raising Livestock Value to Support USD100bn Agricultural Export Target

NEWS | Today

NEWS | Today

CORPORATE NEWS

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Sonadezi Long Thanh to Pay 70% Stock Dividend — Sonadezi Long Thanh plans to issue nearly 20mn shares to pay its 2025 dividend, raising charter capital from VND291bn to nearly VND490bn upon completion.

CORPORATE NEWS | Updated at 15:57:22 · 12/08/2026

Sun PhuQuoc Airways Finalizes Delivery Roadmap for Eight Airbus A330 Widebodies, Accelerating Global Expansion — Sun PhuQuoc Airways (SPA) has finalized plans to receive eight Airbus A330 wide-body aircraft, with four expected to join the fleet in 2026 and four...

CORPORATE NEWS | Updated at 15:57:22 · 12/08/2026

Thuan Thanh Social Housing Remains Loss-Making; More Than VND320bn Interest Payable to Bondholders Yet to Be Recognized — Thuan Thanh Social Housing posted a loss of more than VND34bn in 1H26, taking cumulative losses to nearly VND239bn. Notably, the auditor...

CORPORATE NEWS | Updated at 15:57:22 · 12/08/2026

As AI Becomes the New "Reader", IR Is No Longer a Race for Speed — AI is changing how investors access corporate information while setting new standards for investor relations (IR). According to Securities...

CORPORATE NEWS | Updated at 15:57:22 · 12/08/2026

MSR Plans Cash Dividend as Deleveraging Progress Exceeds Plan — On August 12, 2026, the BOD of Masan High-Tech Materials JSC (UPCoM: MSR) announced a written shareholder consultation to approve an interim dividend plan...

CORPORATE NEWS | Updated at 15:57:22 · 12/08/2026

IVAM Set to Rename as OCB Capital, Nominates OCBS Deputy CEO as Chairman — The BOD of Vietnam Intellectual Fund Management JSC (IVAM) will seek shareholder approval to rename the company OCB Capital, relocate its head office from Hanoi to HCMC and change...

CORPORATE NEWS | Updated at 15:57:22 · 12/08/2026

EVENT CALENDAR

Upcoming corporate and macro events

09/2026 04 — **BRC**
Cash dividend of VND1,100/share
Dividend

09/2026 08 — **HBH**
Cash dividend of VND260/share
Dividend

08/2026 28 — **THN**
Cash dividend of VND1,335/share
Dividend

09/2026 24 — **SHC**
Cash dividend of VND500/share
Dividend

09/2026 16 — **MIG**
Cash dividend of VND1,000/share
Dividend

08/2026 27 — **QNS**
Cash dividend of VND1,000/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	1,793.18	1,936.46	288.45
%	+1.11%	+0.72%	-0.85%
CHANGE	+19.77 pts	+13.93 pts	-2.46 pts
TRADING VALUE	VND11,754.7bn | -VND2,468.1bn (-17.35%)	VND6,773.0bn | -VND977.8bn (-12.62%)	VND516.5bn | -VND247.5bn (-32.4%)
Gainers	160	20	
Unchanged	55	3	
Decliners	154	7	

MARKET MOVEMENT

VN-Index remained in positive territory throughout the session and closed at 1,793.18 points, up nearly 20 points. The index holding near its session high into the close suggests that demand remained dominant, supported by broad-based strength within the VN30 with 20 advancers and foreign net buying of VND302bn, concentrated in VIC, VIX and SSI. Gains in Oil & Gas, Construction, Industrial Parks and Seafood provided the main market leadership, although weakness in several other groups and the broadly balanced number of advancers and decliners indicate that market performance remained clearly mixed. Notably, market liquidity fell sharply from the previous session, reflecting continued investor caution despite the index posting an impressive rebound in headline terms.

MARKET VIEW

VN-Index is reinforcing its primary uptrend after closing at 1,793 points, firmly above the MA10 and MA20, while RSI at 56 and MFI at 66 confirm improving momentum and money flow. The long bullish candle closing near the session high suggests buyers remain in control, supporting a base case in which the index extends its recovery to test resistance at 1,810–1,820 in the coming sessions. Against this backdrop, short-term investors should maintain a buy-on-pullbacks strategy rather than chase rallies, prioritising sectors with supportive catalysts such as SOE divestment, private-sector development, the market-upgrade roadmap or the offshore oil & gas cycle, while taking partial profits as the index approaches resistance. Medium- to long-term investors may continue accumulating fundamentally sound names in Banking, Securities, Retail, Technology and Public Investment near support levels while valuations remain attractive, balancing risk management with return optimisation as market liquidity gradually improves.

FOREIGN FLOW SPOTLIGHT

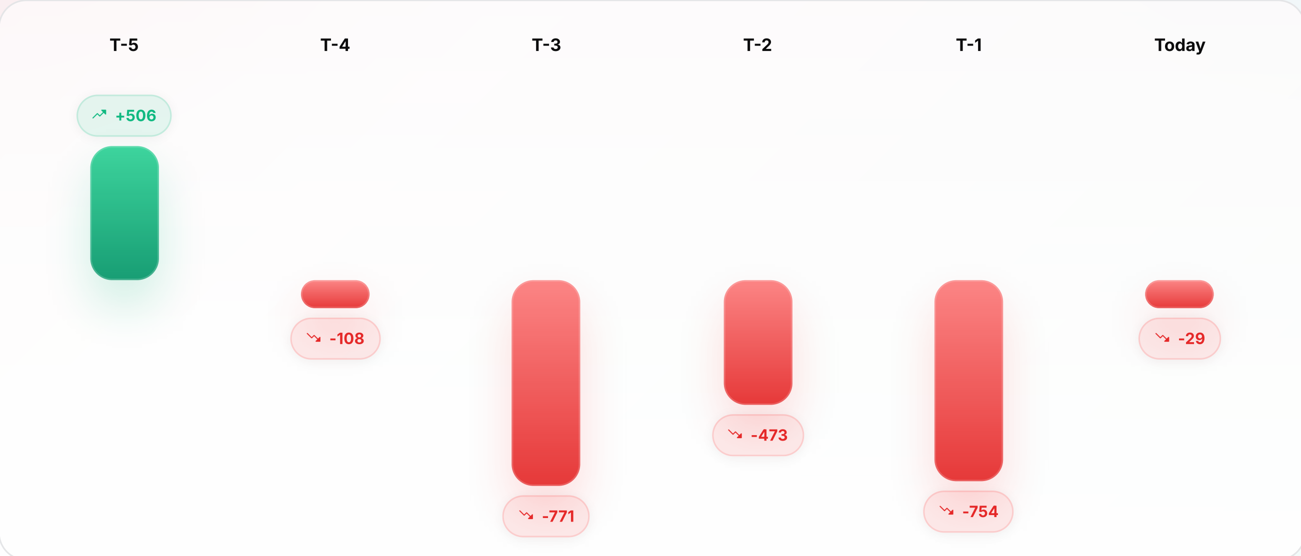
Net-buying sessions **1/6**

Today **-29**

FOREIGN NET FLOW OVER SIX SESSIONS

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

6-session cumulative net selling	-1.629
Widest swing	-771
Reversal session	T-5



Source: Algo, ASEANSC compilation

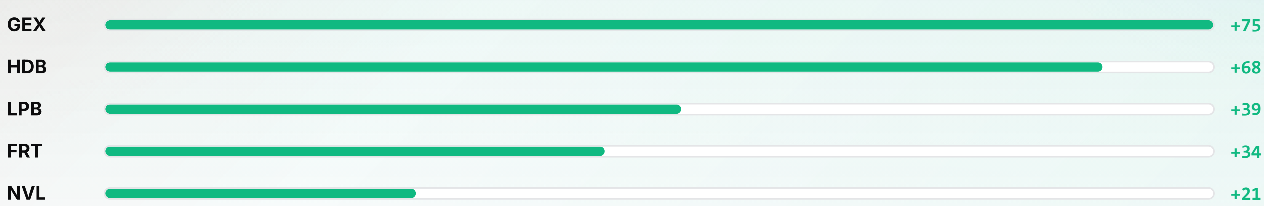
Key highlight: Foreign investors recorded cumulative net selling of VND1.629tn over six sessions, with net selling in five of the six sessions.

FLOW LEADERS

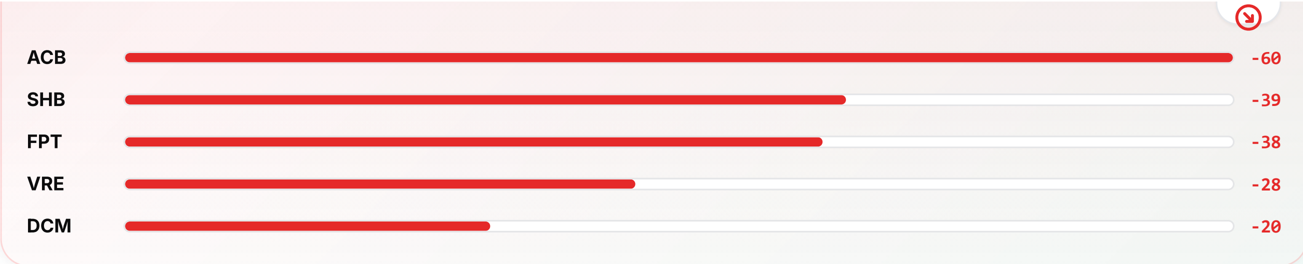
TOP FOREIGN TRADES

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

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

INDEX SUMMARY

VN-INDEX

1,793.18 +1.11%

CHANGE +19.77 pts

TRADING VALUE VND11,754.7bn | -VND2,468.1bn (-17.35%)

Gainers 160 | Unchanged 55 | Decliners 154

VN30

1,936.46 +0.72%

CHANGE +13.93 pts

TRADING VALUE VND6,773.0bn | -VND977.8bn (-12.62%)

Gainers 20 | Unchanged 3 | Decliners 7

HNX-INDEX

288.45 -0.85%

CHANGE -2.46 pts

TRADING VALUE VND516.5bn | -VND247.5bn (-32.4%)

Gainers | Unchanged | Decliners

MARKET MOVEMENT

VN-Index remained in positive territory throughout the session and closed at 1,793.18 points, up nearly 20 points. The index holding near its session high into the close suggests that demand remained dominant, supported by broad-based strength within the VN30 with 20 advancers and foreign net buying of VND302bn, concentrated in VIC, VIX and SSI. Gains in Oil & Gas, Construction, Industrial Parks and Seafood provided the main market leadership, although weakness in several other groups and the broadly balanced number of advancers and decliners indicate that market performance remained clearly mixed. Notably, market liquidity fell sharply from the previous session, reflecting continued investor caution despite the index posting an impressive rebound in headline terms.

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VN-Index is reinforcing its primary uptrend after closing at 1,793 points, firmly above the MA10 and MA20, while RSI at 56 and MFI at 66 confirm improving momentum and money flow. The long bullish candle closing near the session high suggests buyers remain in control, supporting a base case in which the index extends its recovery to test resistance at 1,810–1,820 in the coming sessions. Against this backdrop, short-term investors should maintain a buy-on-pullbacks strategy rather than chase rallies, prioritising sectors with supportive catalysts such as SOE divestment, private-sector development, the market-upgrade roadmap or the offshore oil & gas cycle, while taking partial profits as the index approaches resistance. Medium- to long-term investors may continue accumulating fundamentally sound names in Banking, Securities, Retail, Technology and Public Investment near support levels while valuations remain attractive, balancing risk management with return optimisation as market liquidity gradually improves.

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 (%)
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%
10/08	1,776.77	+8.71 pts	+0.49%
11/08	1,773.41	-3.36 pts	-0.19%
12/08	1,793.18	+19.77 pts	+1.11%

Strongest up session	+19.77 pts
Sharpest down session	-11.68 pts
6-session cumulative	+15.95 pts

FOREIGN FLOW SPOTLIGHT

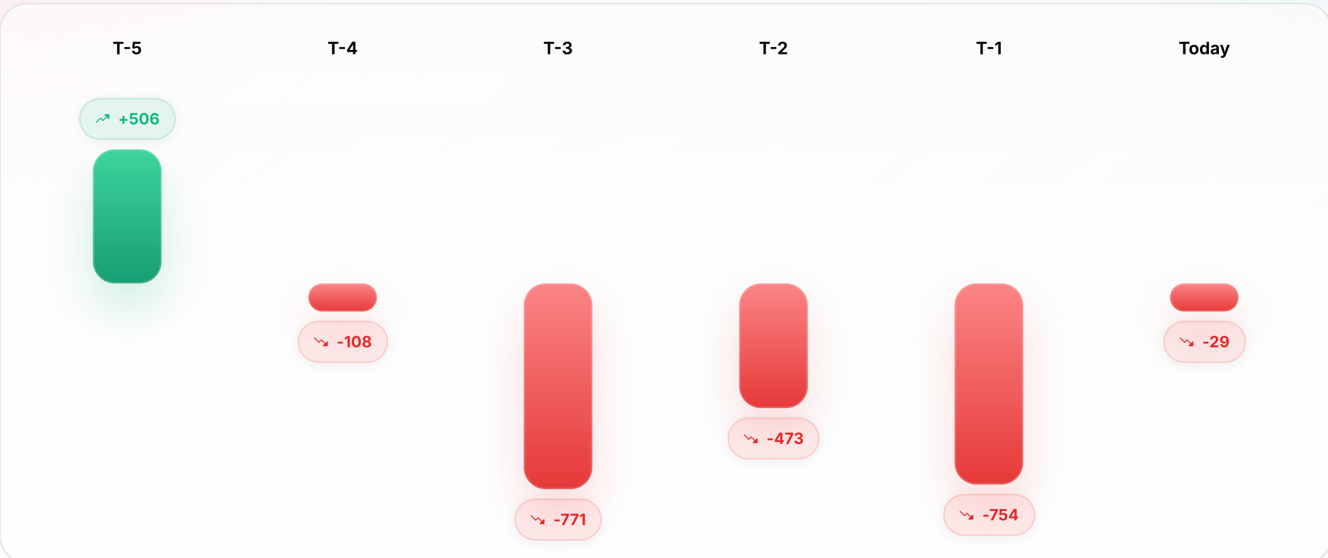
Net-buying sessions 1/6

FOREIGN NET FLOW OVER SIX SESSIONS

Today -29

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

6-session cumulative net selling	-1.629
Widest swing	-771
Reversal session	T-5



Source: Algo, ASEANSC compilation

Key highlight: Foreign investors recorded cumulative net selling of VND1.629tn over six sessions, with net selling in five of the six sessions.

FLOW LEADERS

TOP FOREIGN TRADES

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

TOP 5 NET BOUGHT

GEX	+75
HDB	+68
LPB	+39

FRT	+34
NVL	+21

TOP 5 NET SOLD

ACB	-60
SHB	-39
FPT	-38
VRE	-28
DCM	-20

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
06/08/2026 – 12/08/2026 (1 week)

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Foreign Flow Heatmap

1 WEEK

Resolution 79	+393.08
SOE divestment	+389.97
Consumer & Retail	+246.86
Earnings season	+236.12
New oil discovery	+140.88
U.S.–Iran	+43.58
Exports	+41.33
Public investment	+21.48
Power sector	-15.11
IPO wave	-41.14
Block B - O Mon gas-to-power chain	-51.39
FDI & industrial parks	-101.5

FTSE upgrade	-868.51
Real Estate	-1,031.33
Banks	-1,049.21
Large-cap support	-1,564.98
Resolution 68	-2,546.82

Domestic Flow Heatmap

1 WEEK

Large-cap support	+6,483.11
Resolution 68	+5,965.17
FTSE upgrade	+5,505.22
Banks	+2,944.5
Real Estate	+2,238.16
IPO wave	+2,084.17
Resolution 79	+1,851.17
SOE divestment	+1,798.34
U.S.–Iran	+1,729.74
New oil discovery	+1,639.73
Consumer & Retail	+833.14
Block B - O Mon gas-to-power chain	+728.61
Public investment	+506.8
FDI & industrial parks	+325.19
Exports	+301.09
Power sector	+23.35
Earnings season	-111.11

Strong negative — Strong positive

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