

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

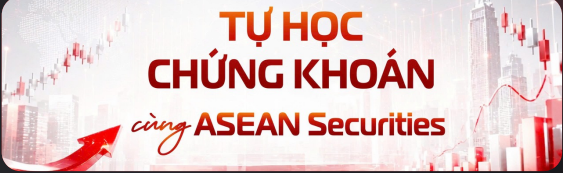
Index	Level	+/- (%)
DJI	53,459.78	-272.63 (-0.51%)
IXIC	26,644.91	-84.25 (-0.32%)
GSPC	7,745.06	-40.7 (-0.52%)
FTSE	10,722.45	+2.15 (0.02%)
GDAXI	26,178.34	-160.27 (-0.61%)
FCHI	8,530.03	-49.57 (-0.58%)

Sources: Investing.com, Vietstock, ASEANSC compilation

ASEAN DIGITAL SECURITIES VIDEOS

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Lessons for professional Vietnamese investors from South Korea's 40% crash — The shift from measuring wealth to measuring investor understanding is an inevitable trend to protect personal capital from high-risk products. From mandatory qualification tests...

INTERNATIONAL
NEWS

Updated at 15:30:22 ·
18/08/2026



Americans flock to installment loans for essential goods — U.S. consumers are no longer using installment-payment services mainly for luxury purchases, but increasingly for everyday essentials. This reflects...

INTERNATIONAL
NEWS

Updated at 15:30:22 ·
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Bitcoin could swing more than 30% over the next two months — Bitcoin may be setting up for a move of around 30% or more over the next two months as volatility in the world's largest cryptocurrency is...

INTERNATIONAL
NEWS

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Europe's wave of low-cost Temu and Shein imports shows signs of cooling — According to the Czech Customs Administration, the country recorded around 1.08 million parcels imported from outside the EU in July 2026, down by more than half from...

INTERNATIONAL
NEWS

Updated at 15:30:22 ·
18/08/2026



What are South Korean investors doing on Wall Street that experts call "crazy"? — South Korean retail investors are pouring money into U.S. equities to avoid the risk of a domestic market correction, even as capital flows...

INTERNATIONAL
NEWS

Updated at 15:30:22 ·
18/08/2026



Stanley Druckenmiller returns to chip and AI stocks ahead of the July sell-off — Billionaire investor Stanley Druckenmiller sharply increased bets on artificial intelligence-related stocks in 2Q26, as the group...

INTERNATIONAL
NEWS

Updated at 15:30:22 ·
18/08/2026



Moody's sharply raises South Korea's 2026 growth forecast to 3.5% — In its periodic assessment of the South Korean economy, Moody's forecasts the country's GDP to grow 3.5% in 2026 and...

INTERNATIONAL
NEWS

Updated at 15:30:22 ·
18/08/2026



Global gold prices approach USD 4,500 — Gold rose on August 17, supported by a weaker U.S. dollar and easing expectations of a Federal Reserve rate hike, while investors...

INTERNATIONAL
NEWS

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 DOMESTIC NEWS

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ROX Key Holdings posts strong growth, set to pay a cash dividend

ECONOMY - INVESTMENT | 2 minutes ago



Government agrees to submit the amended Petroleum Law draft to the National Assembly for consideration and approval

ECONOMY - INVESTMENT | 53 minutes ago



Nikkei: Google plans to move Pixel phone and watch production out of China, with Vietnam selected

ECONOMY - INVESTMENT | 3 hours ago



Ho Chi Minh City removes project bottlenecks and accelerates public investment disbursement

NEWS | Today



Impact assessment and policy consultation on sea-reclamation urban areas

NEWS | ● Today



Membership registration system for the Vietnam International Financial Centre launched

NEWS | ● Today



CORPORATE NEWS

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Casa Del Rio developer remains loss-making; VND 100bn entrusted to two individuals draws attention — The Casa Del Rio developer posted another loss of nearly VND 39mn in 1H26, lifting accumulated losses to more than VND 53bn. Notably, the auditor could not verify...

CORPORATE NEWS | ● Updated at 15:30:22 · 18/08/2026



AMY GRUPO: Young company surpasses two plastics "icons" in scale, with near-industry-leading ROE and superior cash conversion — Compared with two listed plastics companies with leading operating efficiency, AMY GRUPO (AMY) presents a notable growth story: the company...

CORPORATE NEWS | ● Updated at 15:30:22 · 18/08/2026



Thien Long's "open-source code" — Fourteen years ago, when investor relations (IR) was still a relatively new concept, Thien Long Group began laying the foundations for its IR activities with the aim of...

CORPORATE NEWS | ● Updated at 15:30:22 · 18/08/2026



Cen Land fully divests from loss-making subsidiary — Cen Land said it has completed the divestment of its entire 80% stake in Cen Saigon after the company posted losses for two consecutive years.

CORPORATE NEWS | ● Updated at 15:30:22 · 18/08/2026



What does UPCoM newcomer Global Tanker offer? — The Hanoi Stock Exchange (HNX) has approved the registration for trading of Global Tanker JSC shares, ticker...

CORPORATE NEWS | ● Updated at 15:30:22 · 18/08/2026



Chairman Bolat Duisenov: "For Coteccons, winning a bid is only the beginning" — After restoring Coteccons' operating engine to high capacity, Chairman Bolat Duisenov said the company is no longer focused solely on winning bids...

CORPORATE NEWS | ● Updated at 15:30:22 · 18/08/2026



EVENT CALENDAR

Upcoming corporate and macro events

09/2026

14

NAV

Cash dividend of VND 800/share

Dividend

09/2026

09

SDN

Cash dividend of VND 800/share

Dividend

09/2026

09

PMC

Cash dividend of VND 1,964/share

Dividend

10/2026

08

ITC

Cash dividend of VND 400/share

Dividend

09/2026

16

TNP

Cash dividend of VND 2,600/share

Dividend

09/2026

18

ILB

Cash dividend of VND 1,427/share

Dividend

🕒 12:00 PM · MID-SESSION



MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

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Analysis Center

VN-INDEX

1,732.02

+0.26%

CHANGE +4.56 pts

TRADING 11,484.3 VND bn | +894.5
VALUE VND bn (+8.45%)

Gainers

129

Unchanged

76

Decliners

167

VN30

1,876.14

-0.08%

CHANGE -1.54 pts

TRADING 6,883.8 VND bn | +343.1
VALUE VND bn (+5.25%)

Gainers

15

Unchanged

3

Decliners

12

HNX-INDEX

282.32

+1.32%

CHANGE +3.68 pts

TRADING 710.8 VND bn | +200.2
VALUE VND bn (+39.21%)

Gainers

Unchanged

Decliners

MARKET MOVEMENT

VN-Index closed nearly 5 pts higher in a clearly divergent session, although the index finishing in the lower half of its intraday range indicated that supply pressure remained dominant late in the session. Money flow remained largely exploratory as market breadth skewed negative with 167 decliners, led by pressure in Securities, Real Estate, Steel and Textiles, alongside heavy foreign net selling of VND 759bn concentrated in large-cap names including VIC, VPB and SSI. Despite declines in 12 VN30 constituents weighing on the advance, strong gains in Oil & Gas and Port stocks, together with a modest improvement in liquidity versus the previous session, suggested selective rotation rather than a broad withdrawal of capital.

🌐 MARKET VIEW

VN-Index remains in a neutral setup as the recovery attempt has yet to receive momentum confirmation, reflected by the index closing below the MA10 and MA20 while RSI(14) weakened to 43. Although MFI at 66 indicates improving money flow, the current rebound lacks sustainability, suggesting the market may remain range-bound before establishing a clearer trend. Under this scenario, short-term investors should maintain a medium equity weighting, avoid chasing strength and trade around the 1,730–1,740 support zone and 1,750–1,760 resistance zone, while prioritizing stocks with idiosyncratic catalysts such as SOE divestment, economic-development resolutions, the market-upgrade roadmap or the offshore oil & gas cycle. For medium- and long-term strategies, gradual accumulation on pullbacks toward support remains preferred, focusing on 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 -759

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

6-session cumulative net selling

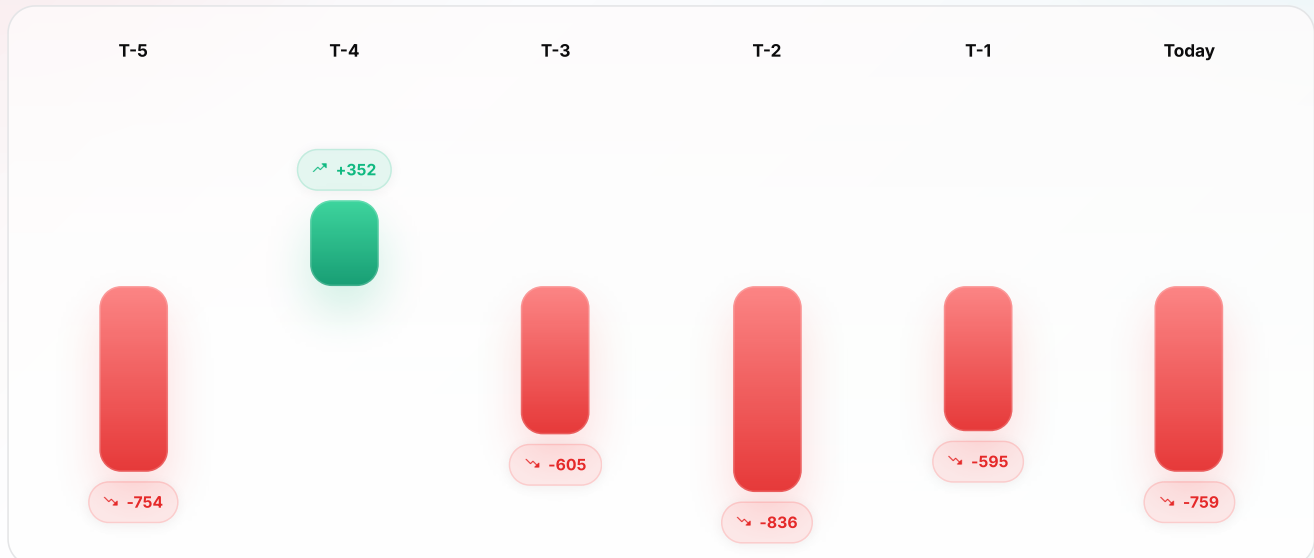
-3,197

Largest swing

-836

Reversal session

T-4



Source: Algo, ASEANSC compilation

Key takeaway: foreign investors posted cumulative net selling of VND 3,197bn 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



FUESSVFL	+61
VNM	+29
CTR	+16
PLX	+15
SAB	+14

TOP 5 NET SOLD



VIC		-149
VPB		-116
SSI		-64
VCB		-60
VHM		-47

📅 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

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VALUE

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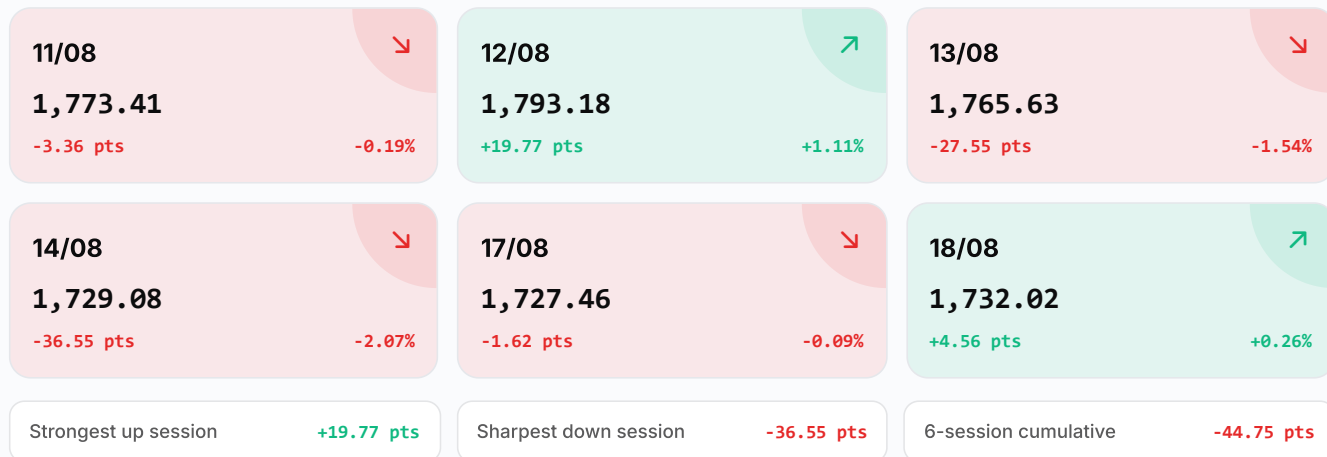
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VN-INDEX PERFORMANCE OVER THE LAST 6 SESSIONS

Each tile represents one recent session | Displays the close and change versus the previous session

■ ADVANCERS ■ DECLINERS ■ SIDEWAYS



FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions 1/6

FOREIGN NET FLOW OVER SIX SESSIONS

↓ Today -759

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

6-session cumulative net selling **-3,197** Largest swing **-836** Reversal session **T-4**



Source: Algo, ASEANSC compilation

Key takeaway: foreign investors posted cumulative net selling of VND 3,197bn over six sessions, with net selling in 5 of 6 sessions.

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TOP FOREIGN TRADES

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VIC

-149

VPB

-116

SSI

-64

VCB

-60

VHM

-47

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 12–18, 2026 (1 week)



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Foreign Flow Heatmap

1 WEEK

Consumer & Retail

+220.09

IPO wave

+200.65

New oil discovery

+73.55

Earnings season

+28.65

U.S.–Iran

-3.71

Power sector

-31.82

FDI & industrial parks

-71.55

Block B–O Mon gas-to-power chain

-71.72

Exports

-142.95

Public Investment

-168.46

Resolution 79

-190.45

SOE divestment

-199.78



Strong negative  Strong positive

DÀNH RIÊNG CHO

1000

KHÁCH HÀNG

ĐẦU TIÊN ĐĂNG KÝ

 Khuyến nghị
danh mục đầu tư

 Tư vấn chuyên sâu từ
các chuyên gia của
ASEAN Securities

Full name

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Phone number

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Email

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