

08:00 AM · PRE-MARKET



MORNING BRIEF

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

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Analysis Center

GLOBAL STOCK INDICES

Index	Level	+/- (%)
DJI	52,064.10	-316.56 (-0.6%)
IXIC	26,081.73	-171.62 (-0.65%)
GSPC	7,591.70	-44.66 (-0.58%)
FTSE	10,628.97	+20.05 (0.19%)
GDAXI	25,431.22	+70.07 (0.28%)
FCHI	8,150.69	+33.93 (0.42%)

Sources: Investing.com, Vietstock, ASEANSC compilation

ASEAN DIGITAL SECURITIES VIDEOS

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Basic Investment Knowledge

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Market Analysis

Quickly open the latest market-analysis videos on YouTube.





Global bond selloff deepens on fears of Fed rate hikes and high oil prices — The selloff in long-dated US bonds spread across global markets on September 11 as escalating Middle East tensions pushed oil prices...

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026



Eurozone economy proves more resilient than expected to energy shock — The Eurozone economy is showing stronger-than-expected resilience, prompting the ECB to raise its growth forecasts for the next two years, although inflation...

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026



US issues special 50-cent coin to commemorate 25th anniversary of 9/11 — The coin is being issued to remember those who died and honor the sacrifices of those who took part in rescue efforts during the attacks...

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026



Where does money flow when rising yields drag down stocks, bonds and gold? — Stocks are typically viewed as higher-risk assets, while gold and bonds are considered safer. The classic 60/40 portfolio allocates 60% to equities and 40%...

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026



The capacity of a shared warehouse — The September/October issue of Foreign Affairs features an article by Michael Froman titled: 'The next global economic crisis could...'

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026



Global gold falls more than 1% as expectations of a Fed rate hike rise — Gold dropped more than 1% on September 10 after US inflation data showed price pressures remained firm, while higher oil prices led markets to price...

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026



Brent oil jumps more than 6%, tops USD107/barrel — Crude oil surged on September 10 to its highest level in more than three months as fighting between Washington and Tehran escalated sharply during the week...

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026



Dow Jones falls for fourth straight session as oil prices climb — US stocks declined on September 10 after US oil topped USD100/barrel amid growing concerns that a prolonged conflict in...

INTERNATIONAL
NEWS

Updated at 18:52:36 ·
11/09/2026

 DOMESTIC NEWS

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What is driving the Grab app-off wave: From algorithms to structural economic issues

ECONOMY - INVESTMENT | 19 minutes ago



Expert: Waive back taxes and penalties for businesses that are already 'clinically dead'

ECONOMY - INVESTMENT | 1 hour ago



HCMC has no policy to reorganize 168 communes, wards and special zones

MACRO | 1 hour ago



Resolution 27-NQ/TW: Expanding development space, creating a new growth impulse for regional economies

MACRO | 2 hours ago



HCMC Department of Home Affairs: Construction sector faces localized labour



HCMC considers pilot 24/7 tourism-entertainment-commercial hub

shortages, over 150,000 vacancies open

ECONOMY - INVESTMENT | 4 hours ago

ECONOMY - INVESTMENT | 4 hours ago

CORPORATE NEWS

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Do Rong tourist area owner carries over USD1bn in liabilities, posts more than VND96bn 1H loss — Van Huong Investoco, owner of the Do Rong project in Hai Phong, had nearly VND26.6tn in liabilities at end-June 2026, while posting a 1H loss of more than VND96bn...

CORPORATE NEWS | Updated at 18:52:36 · 11/09/2026



SMC Chairman: Restructuring may be completed ahead of schedule — On the morning of September 11, SMC Investment Trading JSC (HOSE: SMC) held its 2026 EGM in HCMC, with key agenda items including debt restructuring and additional...

CORPORATE NEWS | Updated at 18:52:36 · 11/09/2026



Financial activities grow, but MVI Life's 1H NPAT still falls 13% — According to its 1H26 financial statements, MVI Life recorded nearly VND869bn in net insurance revenue, down...

CORPORATE NEWS | Updated at 18:52:36 · 11/09/2026



Lower selling expenses lift FWD Vietnam's 1H NPAT to 5x YoY — According to its 1H26 financial statements, FWD Vietnam recorded more than VND2,097bn in net insurance revenue, down...

CORPORATE NEWS | Updated at 18:52:36 · 11/09/2026



Mirae Asset Prévoir turns around, 1H NPAT nearly triples YoY — According to its 1H26 financial statements, Mirae Asset Prévoir recorded net insurance business revenue...

CORPORATE NEWS | Updated at 18:52:36 · 11/09/2026



Hanoi officially leases nearly 17.7ha to Interserco for My Dinh ICD — The Hanoi People's Committee has approved the lease of nearly 177,370sqm of land (about 17.7ha) in Hoai... to International Investment Trade and Services JSC (Interserco, UPCoM: ILS).

CORPORATE NEWS | Updated at 18:52:36 · 11/09/2026



EVENT CALENDAR

Upcoming corporate and macro events

10/2026

26

VFR

Cash dividend VND600/share

Dividend

09/2026

28

PMP

Cash dividend VND1,100/share

Dividend

10/2026

07

GEE

Cash dividend of VND500/share

Dividend

10/2026

15

VGI

Cash dividend VND3,300/share

Dividend

10/2026

08

XHC

Cash dividend VND2,000/share

Dividend

10/2026

20

XMP

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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Analysis Center

VN-INDEX

1,795.21

-1.86%

CHANGE

-34.02 pts

TRADING

VND15,260.3bn |

VALUE

+VND4,003.0bn (+35.56%)

Gainers

51

Unchanged

40

Decliners

284

VN30

1,936.69

-2.03%

CHANGE

-40.13 pts

TRADING

VND9,040.8bn |

VALUE

+VND1,745.5bn (+23.93%)

Gainers 2

Unchanged

0

Decliners

28

HNX-INDEX

272.68

-2.04%

CHANGE

-5.69 pts

TRADING

VND893.6bn |

VALUE

+VND390.5bn (+77.63%)

Gainers

Unchanged

Decliners

📈 MARKET MOVEMENT

VN-Index closed down 34.02 points as selling pressure intensified sharply toward the end of the session, pushing the index to the intraday low and fully erasing earlier recovery attempts. Market breadth was broadly negative, with 284 decliners on HOSE, while VN30 was the key drag as 28 of its 30 constituents fell, compounded by foreign net selling of VND779bn concentrated in large-cap names such as MBB, VPB and VHM. Market-sensitive sectors including Securities, Real Estate, Steel and Construction declined sharply in tandem, weighing heavily on overall sentiment. That said, a notable positive was the strong improvement in market liquidity versus the previous session, indicating that bottom-fishing demand has begun to enter more aggressively, although this buying interest remains insufficient to reverse the intraday downtrend or restore the balance needed against prevailing supply pressure.

🌐 MARKET VIEW

VN-Index is moving in a cautious consolidation phase after closing at 1,795 points. While MA20 support remains intact, dominant selling pressure pushed the index below MA10 and to the intraday low, pointing to the risk of a retest of nearby support levels if demand does not improve soon. Technical indicators remain mixed: RSI is neutral at 50 while MFI at 67 suggests improving money flow; however, the market currently lacks a clear breakout catalyst and is likely to remain range-bound before a more decisive trend emerges. Against this backdrop, short-term investors should maintain medium exposure, avoid chasing rebounds and focus on trading within the 1,790–1,820 range, while prioritizing stocks with idiosyncratic catalysts such as State divestment, market-upgrade prospects, economic-development resolutions or the offshore oil & gas cycle. Medium- and long-term investors may use pullbacks toward support to accumulate gradually in fundamentally solid and liquid sectors such as Banking, Securities, Retail, Public Investment and Oil & Gas.

📊 FOREIGN FLOW SPOTLIGHT

📈 Net-buying sessions 2/6

📊 FOREIGN NET FLOW OVER SIX SESSIONS

📉 Today -944

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

6-session cumulative net selling -1.770

Widest swing -944

Reversal session T-1



Source: Algo, ASEANSC compilation

Highlight: foreign investors recorded cumulative net selling of VND1,770bn over six sessions, with net selling in four of the six sessions.

👤 FLOW LEADERS

👤 TOP FOREIGN TRADES

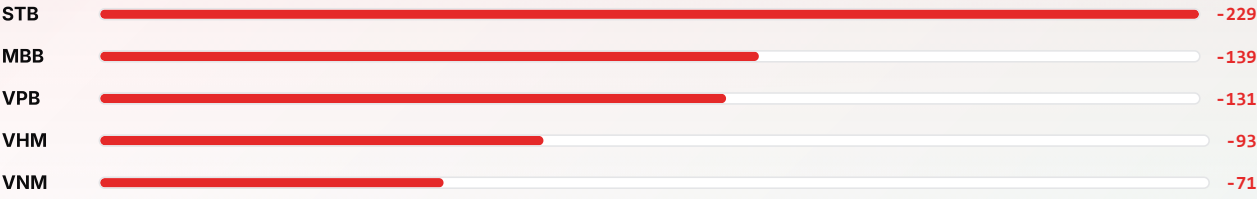
Top five notable net-bought and net-sold stocks in the session.

TOP 5 NET BOUGHT



VIC		+65
PVT		+40
PNJ		+39
DGW		+39
TCB		+34

TOP 5 NET SOLD





MARKET CLOSE

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

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INDEX SUMMARY

VN-INDEX

1,795.21
-1.86%

CHANGE

-34.02 pts

TRADING

VND15,260.3bn |

VALUE

+VND4,003.0bn (+35.56%)

Gainers 51

Unchanged
40

Decliners
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VN30

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-2.03%

CHANGE

-40.13 pts

TRADING

VND9,040.8bn |

VALUE

+VND1,745.5bn (+23.93%)

Gainers 2

Unchanged
0

Decliners
28

HNX-INDEX

272.68
-2.04%

CHANGE

-5.69 pts

TRADING

VND893.6bn | **+VND390.5bn**

VALUE

(+77.63%)

Gainers

Unchanged

Decliners

MARKET MOVEMENT

VN-Index closed down 34.02 points as selling pressure intensified sharply toward the end of the session, pushing the index to the intraday low and fully erasing earlier recovery attempts. Market breadth was broadly negative, with 284 decliners on HOSE, while VN30 was the key drag as 28 of its 30 constituents fell, compounded by foreign net selling of VND779bn concentrated in large-cap names such as MBB, VPB and VHM. Market-sensitive sectors including Securities, Real Estate, Steel and Construction declined sharply in tandem, weighing heavily on overall sentiment. That said, a notable positive was the strong improvement in market liquidity versus the previous session, indicating that bottom-fishing demand has begun to enter more aggressively, although this buying interest remains insufficient to reverse the intraday downtrend or restore the balance needed against prevailing supply pressure.

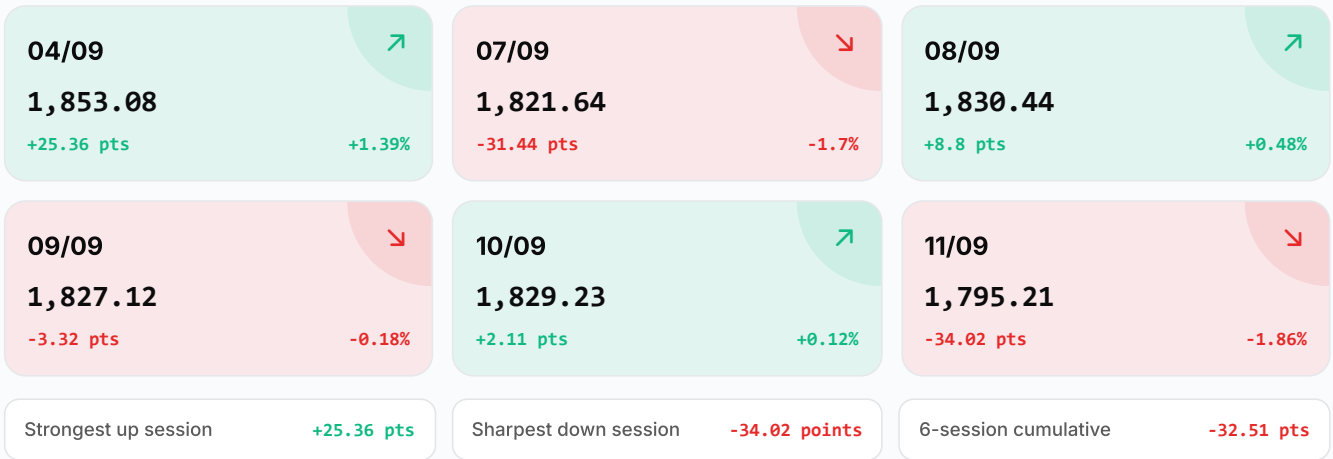
MARKET VIEW

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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



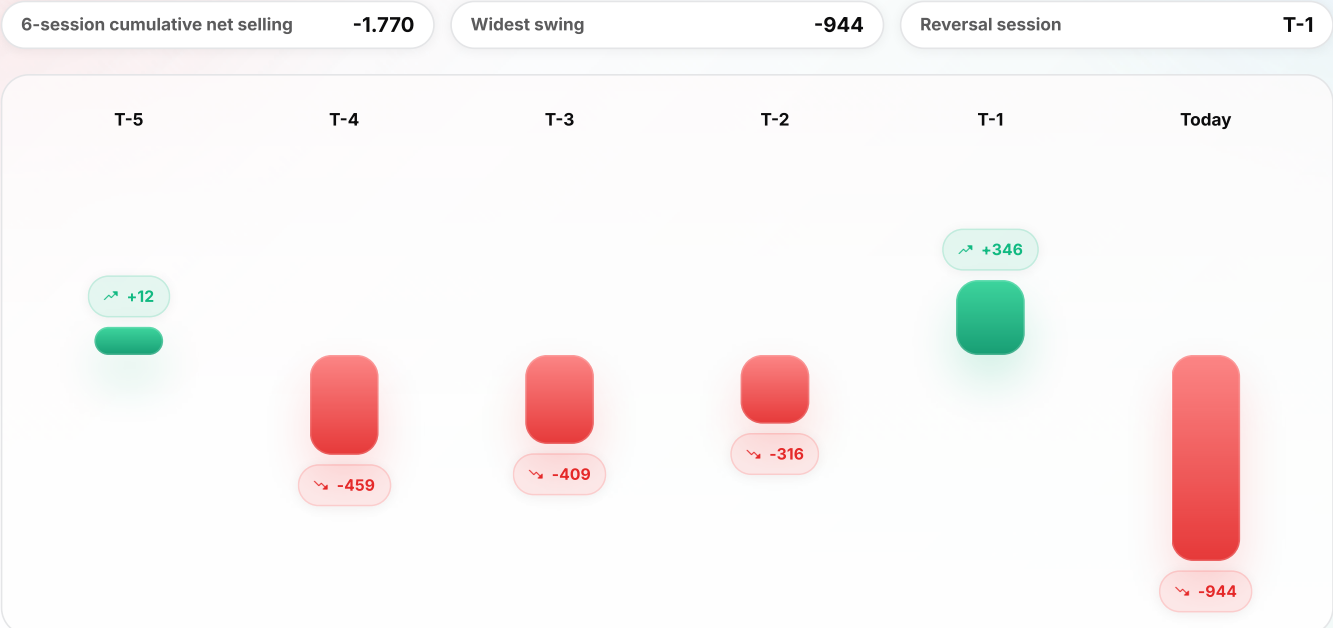
FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions 2/6

FOREIGN NET FLOW OVER SIX SESSIONS

↓ Today -944

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



Source: Algo, ASEANSC compilation

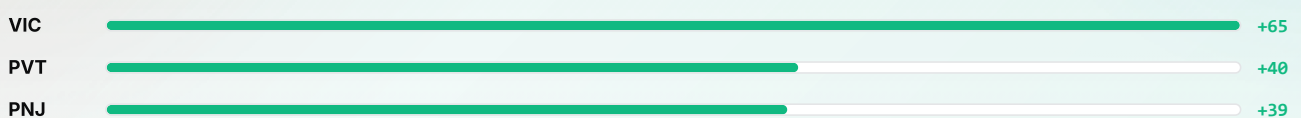
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FLOW LEADERS

TOP FOREIGN TRADES

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

TOP 5 NET BOUGHT



DGW		+39
TCB		+34

TOP 5 NET SOLD

STB		-229
MBB		-139
VPB		-131
VHM		-93
VNM		-71

 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
07/09/2026 – 11/09/2026 (1 week)

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 Research Center

Foreign Flow Heatmap

🌐 1 WEEK

Public Investment		+241.38
New oil discovery		+142.69
U.S.–Iran		+141.04
Power sector		-22.58
Block B–O Mon gas-to-power chain		-40.3
Consumer & Retail		-52.35
Exports		-75.04
FDI & industrial parks		-86.91
Earnings season		-222.26
Resolution 68		-271.51
IPO wave		-287.52
Resolution 79		-327.76



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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