

🕒 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	51,349.92	-131.59 (-0.26%)
IXIC	26,797.54	-22.84 (-0.09%)
GSPC	7,670.84	-12.85 (-0.17%)
FTSE	10,704.90	+68.19 (0.64%)
GDAXI	25,500.00	+100.79 (0.4%)
FCHI	8,037.90	+2.03 (0.03%)

Sources: Investing.com, Vietstock, ASEANSC compilation

📺 ASEAN DIGITAL SECURITIES VIDEOS

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Basic Investment Knowledge

Quickly open the latest basic investment knowledge video playlist on YouTube.



Market Analysis

Quickly open the latest market-analysis videos on YouTube.





USD ends September with strong gains against major currencies — The U.S. dollar was supported by the Fed's firm anti-inflation stance and resilient U.S. economic growth, putting pressure...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026



Fed official: No need to rush further rate hikes — At a meeting earlier this month, the Fed raised rates by 25 bps to around 3.75%–4.00% to address inflation...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026



China vows to retaliate if EU imposes trade restrictions — China's Ministry of Commerce said it would respond firmly to protect domestic industries if the EU proceeds with restrictive measures targeting...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026



EU's "One Europe, One Market" roadmap risks delay — Negotiations between the European Parliament and Council are still ongoing. Several other major bills also remain pending, with the end-2026 deadline...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026



Canada-U.S. trade dispute escalates further — The latest dispute began this summer, when President Trump invoked a Depression-era law to impose a 50% tariff on imported goods...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026



Long-term U.S. Treasury yields hit highest since 2002 — U.S. long-term borrowing costs rose to a 24-year high on September 29 as the sell-off in the Treasury market continued to deepen...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026



WTI falls 3.5% as Saudi crude exports recover — Oil prices declined on September 29 as Saudi crude exports via Red Sea ports gradually recovered following an attack on a...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026



Gold edges higher after hitting a more than seven-week low — Gold prices rose modestly on September 29 after touching their lowest level in more than seven weeks in the previous session, as investors monitored U.S. economic data...

INTERNATIONAL
NEWS

Updated at 17:07:22 ·
02/10/2026

 DOMESTIC NEWS

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Finance Minister: Comprehensive amendment to the Public Procurement Law to improve procurement quality and efficiency

ECONOMY - INVESTMENT | 48 minutes ago



Standing Deputy PM: Supporting industries remain "broad but not deep, numerous but not strong"

ECONOMY - INVESTMENT | 1 hour ago



Passenger service charges at Long Thanh Airport announced from October 1

ECONOMY - INVESTMENT | 1 hour ago



Quang Ninh leads the country in 9M economic growth

NEWS | Today



Ministry of Construction identifies 29 priority expressway projects for PPP investment

NEWS | Today



Which categories of imported goods must undergo customs procedures at the import checkpoint?

NEWS | Today



GTA estimates 9M PBT up 43%, likely to beat its full-year plan by 18% — On September 29, Thuan An Wood Processing JSC (T.A.C, HOSE: GTA), a member of Vietnam Rubber Industry Group (HOSE: GVR), estimated nearly VND8bn...

CORPORATE NEWS | Updated at 17:07:22 · 02/10/2026



PNJ seeks private placement of 550 million shares, exceeding current shares outstanding — This is the jewelry retailer's latest move following a series of restructuring steps. On the morning of September 30, PNJ shares continued to hit the floor for a third consecutive session...

CORPORATE NEWS | Updated at 17:07:22 · 02/10/2026



BCM to sell 200 Green City Binh Duong homes, expected to bring in over VND1tn — Becamex Group approved the sale of 200 homes in the Green City Binh Duong project to Becamex IJC, with total after-tax contract value exceeding VND1,012bn.

CORPORATE NEWS | Updated at 17:07:22 · 02/10/2026



BAF expands subsidiary portfolio and seeks capital increase to over VND4.1tn — In September, BAF Vietnam Agriculture JSC (HOSE: BAF) repeatedly moved to add subsidiaries through new establishments and acquisitions...

CORPORATE NEWS | Updated at 17:07:22 · 02/10/2026



More than 11 million newly issued F88 shares officially start trading on UPCoM — F88 completed procedures to bring its public-offering shares into trading as FY2026 PBT is forecast to exceed the full-year plan by more than 30%...

CORPORATE NEWS | Updated at 17:07:22 · 02/10/2026



TID's 1H net profit falls 86%; company continues planning subsidiary disposals — 1H2026 net profit fell 86% YoY, while Tin Nghia Corporation (UPCoM: TID) continued to plan subsidiary disposals, most recently its entire...

CORPORATE NEWS | Updated at 17:07:22 · 02/10/2026



EVENT CALENDAR

Upcoming corporate and macro events

11/2026

10

SPB

Cash dividend VND500/share

Dividend

10/2026

20

MGG

Cash dividend VND1,500/share

Dividend

10/2026

28

DRL

Cash dividend VND1,500/share

Dividend

10/2026

16

PPS

Cash dividend VND790/share

Dividend

11/2026

04

GDA

Cash dividend VND1,000/share

Dividend

10/2026

29

TV1

Cash dividend VND1,500/share

Dividend



MID-SESSION UPDATE

Morning market pulse, money flow and key index movements.

[Place order](#)[Analysis Center](#)

VN-INDEX

1,768.62

-0.51%

CHANGE

-9.11 pts

TRADING

VND11,316.4bn |

VALUE

+VND973.7bn (+9.41%)

Gainers

129

Unchanged

58

Decliners

178

VN30

1,906.81

-0.39%

CHANGE

-7.54 pts

TRADING

VND5,650.5bn | -

VALUE

VND51.6bn (-0.9%)

Gainers

10

Unchanged

3

Decliners

17

HNX-INDEX

271.64

+0.64%

CHANGE

+1.73 pts

TRADING

VND572.2bn | -

VALUE

VND106.3bn (-15.67%)

Gainers

Unchanged

Decliners

MARKET MOVEMENT

VN-Index closed 9.11 points lower as selling pressure intensified late in the session, erasing earlier recovery attempts and pushing the index to close near the intraday low. Market breadth deteriorated markedly, with 178 decliners on HOSE, while VN30 also came under pressure as 17/30 constituents fell, led by Oil & Gas, Fertilizers, Construction and Aviation. Foreign investors remained net sellers at VND272bn, concentrated in large caps including VIC, VPB and VHM, adding further pressure on sentiment. That said, liquidity improved modestly vs the previous session, while selective strength in Power, Textiles and Industrial Park Real Estate suggests capital is still rotating into idiosyncratic pockets rather than exiting the market entirely.

MARKET VIEW

VN-Index showed clearer signs of weakness, closing at 1,769, below the MA10 and MA20, with selling pressure pushing the index to the intraday low. RSI at 42 and MFI at 33 both point to weakening momentum, tilting the near-term outlook toward further correction to retest nearby support. With demand still insufficient, short-term investors should prioritize risk management by reducing exposure into technical rebounds, avoiding leverage, and only adding positions once bottoming signals emerge alongside improving liquidity, focusing on idiosyncratic themes such as SOE divestment, economic-development resolutions, the market-upgrade roadmap or the offshore cycle. For medium- to long-term positions, this is an opportunity to scale in selectively at firm support zones, favoring fundamentally sound stocks over highly volatile, illiquid sectors.

FOREIGN NET FLOW OVER SIX SESSIONS

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

Today -841

6-session cumulative net selling -3.935

Largest swing -1.050

Reversal session

None

T-5

T-4

T-3

T-2

T-1

Today



-1.050



-950



-402



-326



-366



-841

Source: Algo, ASEANSC
compilation

Highlight: foreign investors posted cumulative net selling of VND3,935bn over six sessions, with net selling in all 6/6 sessions.

FLOW LEADERS

TOP FOREIGN TRADES

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

TOP 5 NET BOUGHT



HDB		+38
MSN		+33
FRT		+33
DMX		+25
VPI		+25

TOP 5 NET SOLD



VHM		-323
TCB		-162
VIC		-79
VPB		-57
PNJ		-51

📅 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

1,768.62

-0.51%

CHANGE

-9.11 pts

TRADING
VALUE

VND11,316.4bn |
+VND973.7bn (+9.41%)

Gainers
129

Unchanged
58

Decliners
178

VN30

1,906.81

-0.39%

CHANGE

-7.54 pts

TRADING
VALUE

VND5,650.5bn | -
VND51.6bn (-0.9%)

Gainers 10

Unchanged
3

Decliners
17

HNX-INDEX

271.64

+0.64%

CHANGE

+1.73 pts

TRADING
VALUE

VND572.2bn | -VND106.3bn
(-15.67%)

Gainers

Unchanged

Decliners

MARKET MOVEMENT

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MARKET VIEW

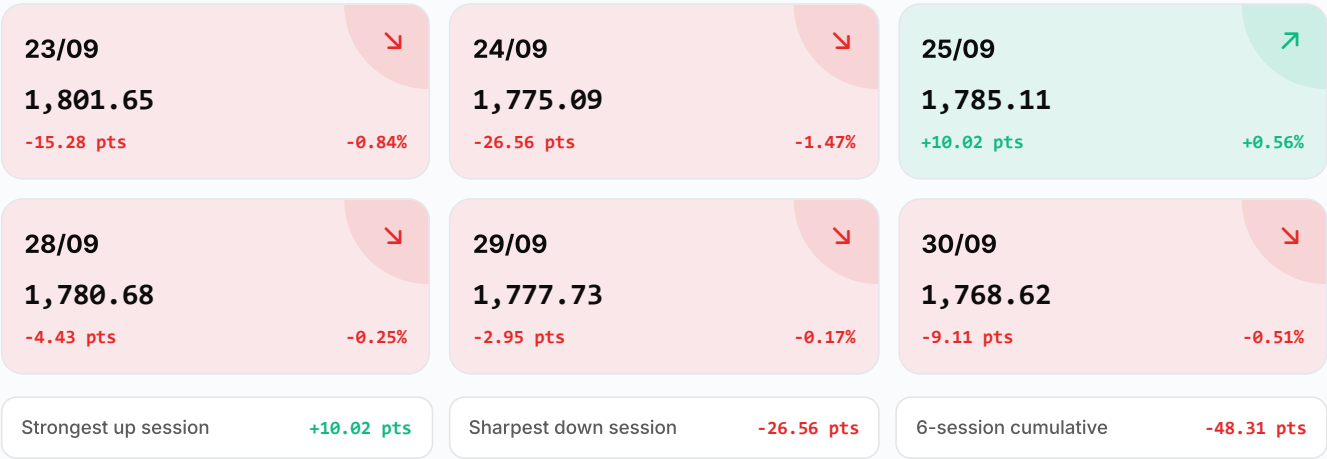
VN-Index showed clearer signs of weakness, closing at 1,769, below the MA10 and MA20, with selling pressure pushing the index to the intraday low. RSI at 42 and MFI at 33 both point to weakening momentum, tilting the near-term outlook toward further correction to retest nearby support. With demand still insufficient, short-term investors should prioritize risk management by reducing exposure into technical rebounds, avoiding leverage, and only adding positions once bottoming signals emerge alongside improving liquidity, focusing on idiosyncratic themes such as SOE divestment, economic-development resolutions, the market-upgrade roadmap or the offshore cycle. For medium- to long-term positions, this is an opportunity to scale in selectively at firm support zones, favoring fundamentally sound stocks over highly volatile, illiquid sectors.



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

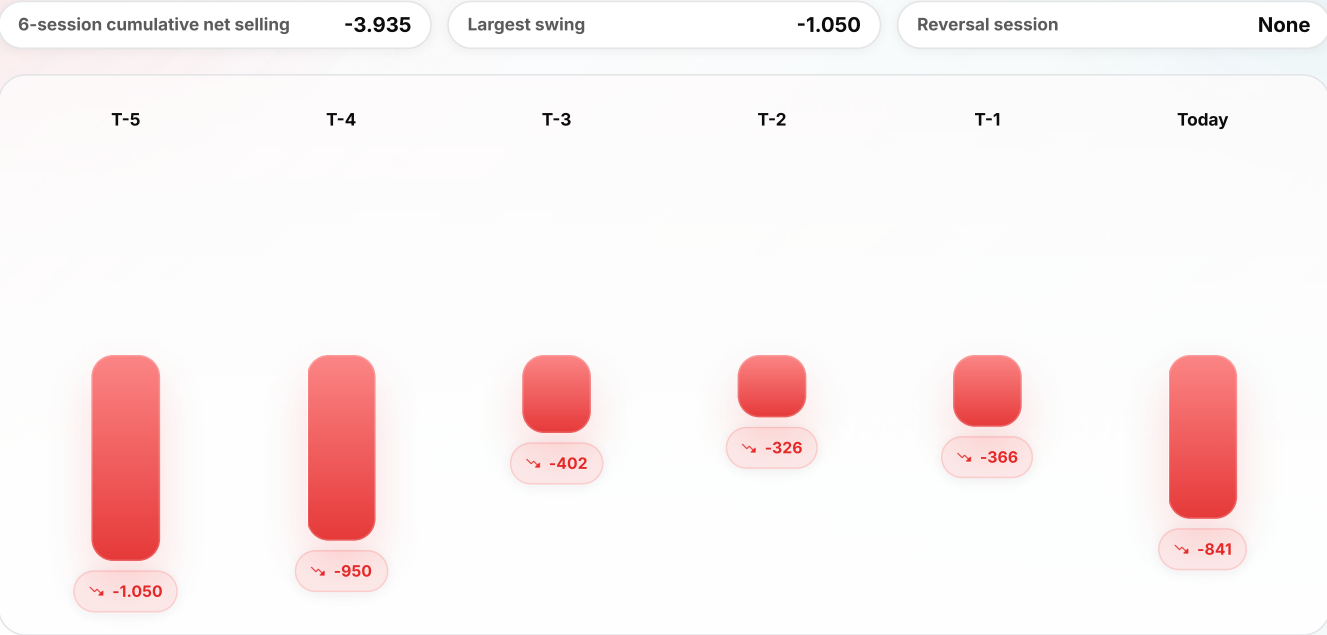
↑ Net-buying sessions 0/6



FOREIGN NET FLOW OVER SIX SESSIONS

↓ Today -841

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



Source: Algo, ASEANSC compilation

Highlight: foreign investors posted cumulative net selling of VND3,935bn over six sessions, with net selling in all 6/6 sessions.

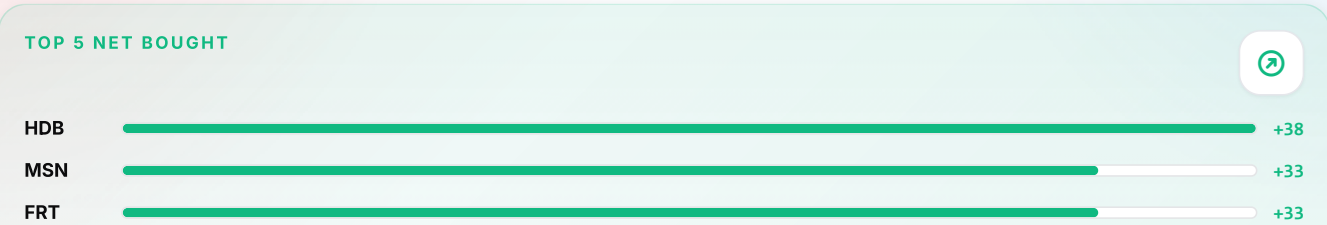


FLOW LEADERS



TOP FOREIGN TRADES

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



DMX		+25
VPI		+25

TOP 5 NET SOLD



VHM		-323
TCB		-162
VIC		-79
VPB		-57
PNJ		-51

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
24/09/2026 – 30/09/2026 (1 week)

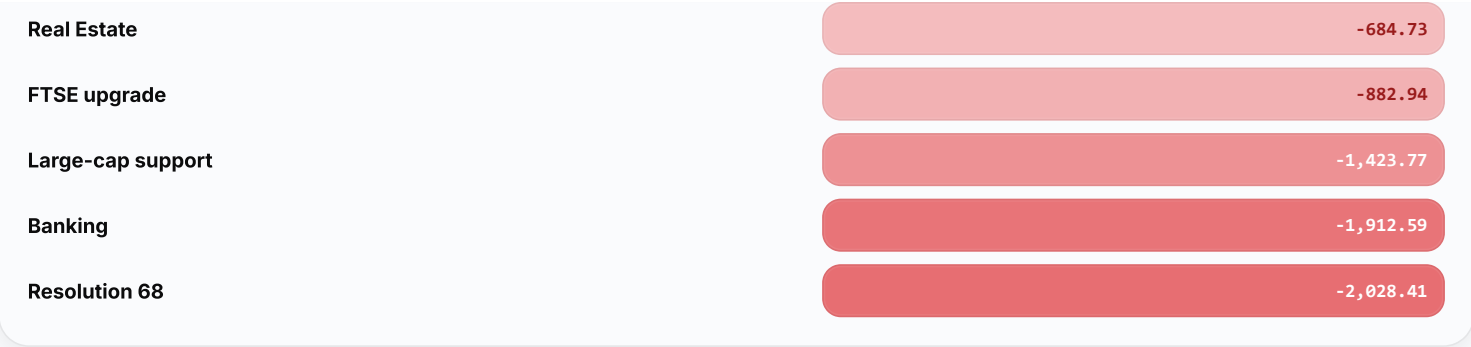
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Foreign Flow Heatmap

1 WEEK

U.S.–Iran		+377.75
Block B–O Mon gas-to-power chain		+282.83
New oil discovery		+272.74
Consumer & Retail		+257.28
Power sector		+40.87
FDI & industrial parks		-7.77
Exports		-28.04
IPO wave		-158.09
Public Investment		-248.45
Earnings season		-255.9
Resolution 79		-297.7
SOE divestment		-298.71



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

Please enter

Phone number

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Email

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**ASEAN SECURITIES CORPORATION**

Website: www.aseansc.com.vn

HEAD OFFICE

Floors 4, 5, 6, 7 – No. 3 Dang Thai Than,
Cua Nam Ward, Hanoi.

Tel: 024 6275 8668

Order hotline: 024 6275 8888

HO CHI MINH CITY BRANCH

2nd Floor – No. 77–79 Pho Duc Chinh,
Ben Thanh Ward, Ho Chi Minh City.

Tel: 028 3933 0308

Order hotline: 028 3933 0309



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