

🕒 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	51,267.90	+90.94 (0.18%)
IXIC	27,477.31	+286.45 (1.05%)
GSPC	7,773.95	+51.23 (0.66%)
FTSE	10,577.13	+79.19 (0.75%)
GDAXI	25,445.89	+191.68 (0.76%)
FCHI	7,873.31	+39.21 (0.5%)

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.





Why are thousands of tonnes of Russian gold flowing into Hong Kong? — Russian-origin gold is flowing into Hong Kong at a record pace, indicating that Western sanctions have redirected gold flows that previously...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
06/10/2026



Euro falls to 17-month low — The euro fell to its lowest level in 17 months against the USD on 05/10, as a sell-off in French bonds rattled markets...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
06/10/2026



Are we worrying about the wrong inflation risk? — On 16/09/2026, the U.S. Federal Reserve (Fed) raised its policy rate by 25bps to around 3.75%–4.00%. The stated reason was to curb...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
06/10/2026



Why are U.S. equities still at record highs despite a bond sell-off and elevated yields? — U.S. Treasury yields reached a two-decade high while equity indices remained near record levels. This divergence breaks...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
06/10/2026



Grab and GoTo under pressure as drivers revolt and Southeast Asian countries tighten commission rules — Grab is facing rising pressure as Southeast Asian countries step up oversight of commissions and require platforms to improve driver incomes and benefits...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
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Asia's silver economy opens a multi-trillion-dollar consumer market — By 2030, an estimated 733mn people aged 60+ across 14 Asia-Pacific markets are expected to hold USD7.1tn in assets...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
06/10/2026



Eurozone economic activity expands at fastest pace in more than 3½ years — Eurozone economic activity expanded at its fastest pace in nearly three and a half years in September 2026, as demand remained strong despite...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
06/10/2026



Global gold prices flat — Gold prices were broadly flat on 06/10 as pressure from a stronger USD and elevated U.S. Treasury yields was offset by expectations that the Federal Reserve...

INTERNATIONAL
NEWS

Updated at 17:19:21 ·
06/10/2026

 DOMESTIC NEWS

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What Vietnam's fastest GDP growth in 15 years tells us

MACRO | ● 4 hours ago



Resolution 10-NQ/TW: New destinations for FDI flows in Ho Chi Minh City

NEWS | ● Today



EVN proposes negotiating lower power purchase prices for renewable projects with acceptance violations

NEWS | ● Today



Siemens Energy wants to build an energy supply chain in Vietnam

NEWS | ● Today



Nine people prosecuted for bringing over 10,000 tonnes of pigs treated with banned substances to market



Six provinces and cities unable to self-supply materials for key projects

NEWS | ● Today

 CORPORATE NEWS Place order

Mai Kieu Lien named among Fortune's 100 Most Powerful Women in Asia for third consecutive year — Former Party Central Committee member, Labour Hero and Vinamilk CEO Mai Kieu Lien has again been named by Fortune among Asia's 100 Most Powerful Women...

CORPORATE NEWS | ● Updated at 17:19:21 · 06/10/2026



Kosy exits hydropower subsidiary as shares hit floor for 12 consecutive sessions — Kosy, chaired by Nguyen Viet Cuong, has completed the sale of its 98% stake in the company owning the Nam Pac 1 and 2 hydropower plants after nearly five...

CORPORATE NEWS | ● Updated at 17:19:21 · 06/10/2026



TV4 sets record date for nearly VND20bn dividend payout — Power Engineering Consulting JSC 4 (HNX: TV4) announced the record date for its 2025 dividend. The ex-dividend date is 15/10.

CORPORATE NEWS | ● Updated at 17:19:21 · 06/10/2026



SBA to issue 3mn bonus shares, raising charter capital to over VND635bn — Song Ba JSC (HOSE: SBA) announced a share issuance to increase share capital from owners' equity. The ex-rights date is 16/10.

CORPORATE NEWS | ● Updated at 17:19:21 · 06/10/2026



From "sales mode" to "saving mode": Foundation for Coteccons' quality-growth phase — FY2026 marked another step in Coteccons' recovery and growth journey, with improvements in profit, cash flow and management quality...

CORPORATE NEWS | ● Updated at 17:19:21 · 06/10/2026



BBH fined and subject to nearly VND0.5bn in tax arrears — On 30/09/2026, Hoang Thach Packaging JSC (UPCoM: BBH) announced a penalty decision from the Hai Phong City Tax Department for administrative violations, including penalties and tax arrears...

CORPORATE NEWS | ● Updated at 17:19:21 · 06/10/2026



EVENT CALENDAR

Upcoming corporate and macro events

12/2026

25

CNC

Cash dividend VND2,000/share

Dividend

12/2026

01

CLW

Cash dividend VND400/share

Dividend

10/2026

27

MQB

Cash dividend VND400/share

Dividend

11/2026

10

SSC

Cash dividend VND1,000/share

Dividend

11/2026

25

TTT

Cash dividend VND2,000/share

Dividend

10/2026

19

LNC

Cash dividend VND110/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

1,759.08

+0.34%

CHANGE

+5.88 pts

TRADING
VALUE

14,489.2 VND bn |
+4,317.8 VND bn
(+42.45%)

Gainers

127

Unchanged

64

Decliners

177

VN30

1,898.82

+0.23%

CHANGE

+4.36 pts

TRADING
VALUE

8,764.9 VND bn |
+2,870.3 VND bn
(+48.69%)

Gainers

17

Unchanged

6

Decliners

7

HNX-INDEX

265.53

-1.52%

CHANGE

-4.09 pts

TRADING
VALUE

1,003.1 VND bn | +419.8
VND bn (+71.98%)

Gainers

Unchanged

Decliners

MARKET MOVEMENT

VN-Index remained in positive territory for most of the session and closed 5.88 points higher, confirming a constructive trading tone as the index finished above its intraday average. Active buying lifted the index by as much as 10.64 points during the session, supported by a notable improvement in liquidity and leadership from the VN30, where 17 constituents advanced, alongside strong gains in Securities and Oil & Gas. Nevertheless, market breadth remained tilted to the downside with 177 decliners on HOSE, while Fisheries came under correction pressure. Foreign investors also sustained heavy net selling of VND1,018bn, concentrated in large-cap names such as HDB, ACB and NVL, creating a meaningful drag on the broader market's breakout attempt.

MARKET VIEW

VN-Index remains in a tug-of-war after closing at 1,759 points. Despite an intraday recovery, the index has yet to reclaim the MA10 and MA20, while momentum indicators weakened, with RSI at 43 and MFI at 34, indicating that the short-term downtrend remains dominant and downside retest risk persists. Under a neutral scenario, the index is likely to continue trading in a narrow range before establishing a clearer trend. Short-term investors should therefore maintain a moderate equity exposure, avoid chasing rebounds, and focus on trading around support at 1,750–1,760 and resistance at 1,770–1,780, while monitoring stocks with idiosyncratic catalysts such as SOE divestment, economic development resolutions, the market-upgrade roadmap or the offshore oil & gas cycle. For medium- to long-term strategies, pullbacks toward medium-term support provide opportunities for gradual accumulation, prioritising fundamentally sound, liquid sectors such as Banks, Securities, Retail, Public Investment and Oil & Gas.

FOREIGN FLOW SPOTLIGHT

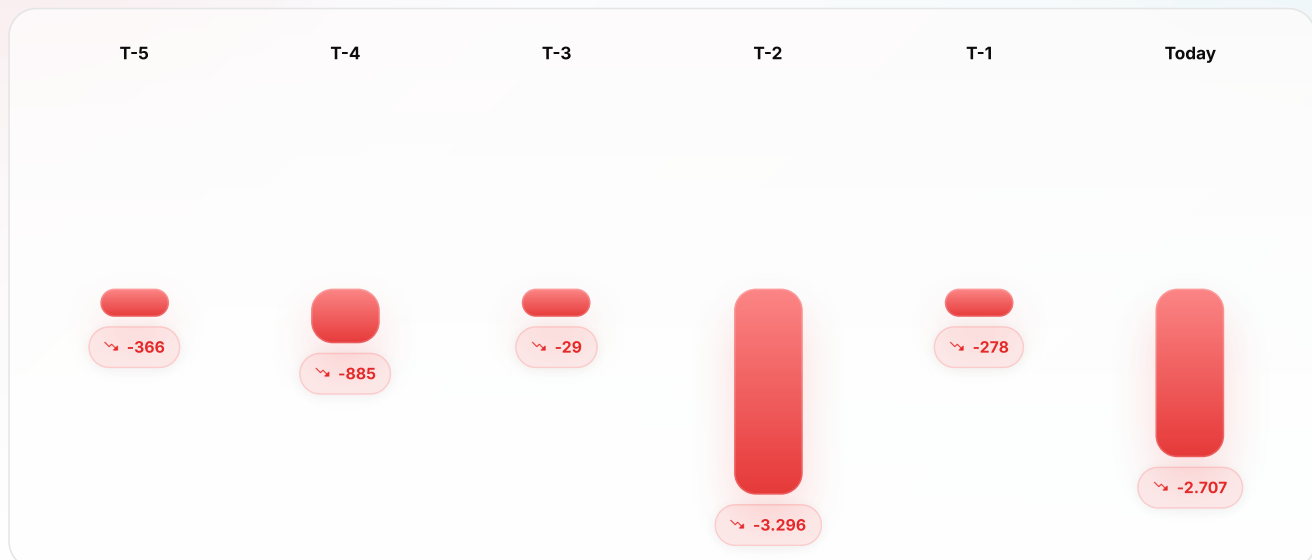
Net-buying sessions 0/6

FOREIGN NET FLOW OVER SIX SESSIONS

Hôm nay -2.707

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

6-session cumulative net selling -7.561 Largest swing -3.296 Reversal session None



Source: Algo, ASEANSC compilation

Key highlight: foreign investors recorded cumulative net selling of VND7,561bn 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



VIC		+79
SHB		+78
GMD		+59
VND		+50
DCM		+45

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 			VN30 			HNX-INDEX 		
1,759.08			1,898.82			265.53		
+0.34%			+0.23%			-1.52%		
CHANGE +5.88 pts			CHANGE +4.36 pts			CHANGE -4.09 pts		
TRADING 14,489.2 VND bn +4,317.8			TRADING 8,764.9 VND bn +2,870.3			TRADING 1,003.1 VND bn +419.8		
VALUE VND bn (+42.45%)			VALUE VND bn (+48.69%)			VALUE VND bn (+71.98%)		
Gainers 127 Unchanged 64 Decliners 177			Gainers 17 Unchanged 6 Decliners 7			Gainers Unchanged Decliners		

MARKET MOVEMENT

VN-Index remained in positive territory for most of the session and closed 5.88 points higher, confirming a constructive trading tone as the index finished above its intraday average. Active buying lifted the index by as much as 10.64 points during the session, supported by a notable improvement in liquidity and leadership from the VN30, where 17 constituents advanced, alongside strong gains in Securities and Oil & Gas. Nevertheless, market breadth remained tilted to the downside with 177 decliners on HOSE, while Fisheries came under correction pressure. Foreign investors also sustained heavy net selling of VND1,018bn, concentrated in large-cap names such as HDB, ACB and NVL, creating a meaningful drag on the broader market's breakout attempt.

MARKET VIEW

VN-Index remains in a tug-of-war after closing at 1,759 points. Despite an intraday recovery, the index has yet to reclaim the MA10 and MA20, while momentum indicators weakened, with RSI at 43 and MFI at 34, indicating that the short-term downtrend remains dominant and downside retest risk persists. Under a neutral scenario, the index is likely to continue trading in a narrow range before establishing a clearer trend. Short-term investors should therefore maintain a moderate equity exposure, avoid chasing rebounds, and focus on trading around support at 1,750–1,760 and resistance at 1,770–1,780, while monitoring stocks with idiosyncratic catalysts such as SOE divestment, economic development resolutions, the market-upgrade roadmap or the offshore oil & gas cycle. For medium- to long-term strategies, pullbacks toward medium-term support provide opportunities for gradual accumulation, prioritising fundamentally sound, liquid sectors such as Banks, Securities, Retail, Public Investment and Oil & Gas.

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

29/09

1,777.73

-2.95 pts

-0.17%

30/09

1,768.62

-9.11 pts

-0.51%

01/10

1,749.30

-19.32 pts

-1.09%

02/10

1,737.71

-11.59 pts

-0.66%

05/10

1,753.20

+15.49 pts

+0.89%

06/10

1,759.08

+5.88 pts

+0.34%

Strongest up session

+15.49 pts

Sharpest down session

-19.32 pts

6-session cumulative

-21.6 pts

FOREIGN FLOW SPOTLIGHT

↑ Net-buying sessions 0/6

FOREIGN NET FLOW OVER SIX SESSIONS

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

↓ Hôm nay -2.707

6-session cumulative net selling

-7.561

Largest swing

-3.296

Reversal session

None

T-5

T-4

T-3

T-2

T-1

Today

-366

-885

-29

-3.296

-278

-2.707

Source: Algo, ASEANSC compilation

Key highlight: foreign investors recorded cumulative net selling of VND7,561bn 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

VIC		+79
SHB		+78
GMD		+59

VND		+50
DCM		+45

TOP 5 NET SOLD



HDB		-2.039
VJC		-805
PNJ		-101
TCB		-84
ACB		-69

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
30/09/2026 – 06/10/2026 (1 week)

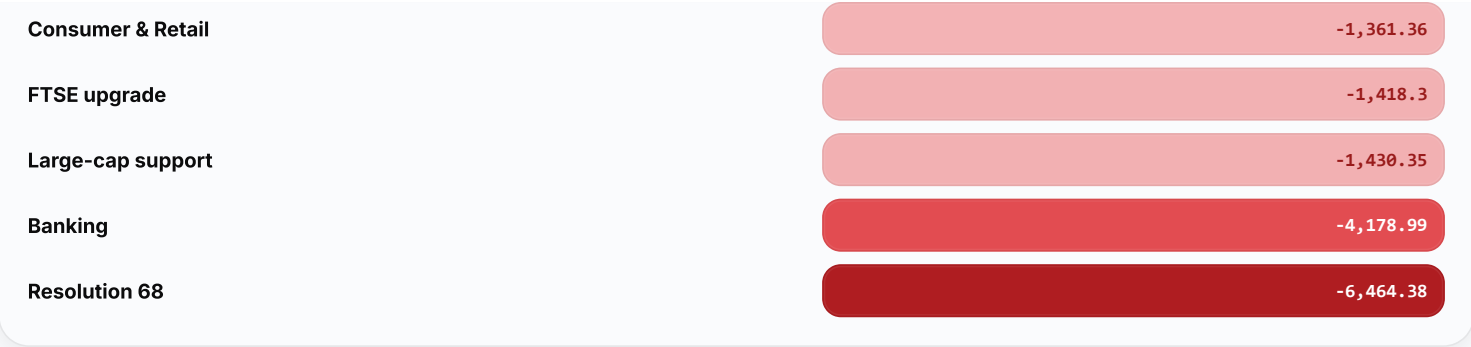
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Foreign Flow Heatmap

🌐 1 WEEK

Exports		+131.54
Public Investment		+58.12
Block B-O Mon gas-to-power chain		+28.6
Power sector		+14.81
U.S.-Iran		+8.67
Làn sóng IPO		+0.8
Earnings season		-13.82
New oil discovery		-42.82
FDI & industrial parks		-49.46
Resolution 79		-222.05
SOE divestment		-228.89
Real Estate		-500.07



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

Please enter

Email

Please enter

Register

Scan the QR code to register



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