

Daily report

Market Summary:

"Sideway in doubt"

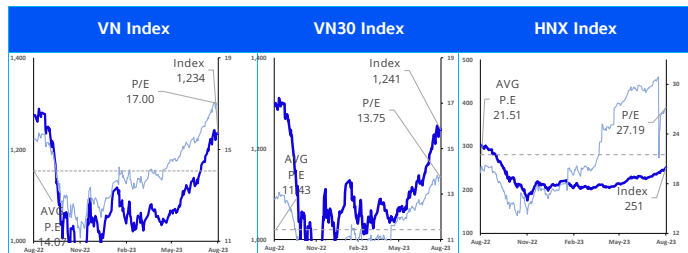
▶ In Tuesday's session, the liquidity decreased slightly, and the two indexes moved in opposite directions, showing the struggling sentiment of investors.

▶ At the end of the session, the VN-Index lost 2.79 points, equivalent to 0.23%, reaching 1,234.05 points; HNX-Index gained 1.01 points (+0.40%), reaching 251.45 points. Market liquidity reached VND 19.2 trillion, equivalent to about 912 million shares traded. Foreign investors net sold VND 534 billion, focusing mainly on VPB and VIC.

▶ VRE (+3.30%), VHM (+0.82%), and FPT (+1.69%) were the three stocks that contributed the most to the green color of the market. On the contrary, VIC (-3.55%), BID (-1.26%), and VNM (-0.82%) were the three tickers that lost the most points in the market.

▶ Healthcare and Information Technology were two impressive gainers in today's session with typical stocks such as DHG and FPT.

▶ Technical view: The market bounced back when touching the MA10, showing that the buying force is still maintained to support the market. However, the short-term uptrend is challenged when the index is moving below the support line of the short-term uptrend. The indicators are also giving negative signals when the MACD line has crossed the signal line. At the same time, the RSI continued to drop below 70 points and signaled a divergence against VNINDEX, signaling that the risk continued to increase.

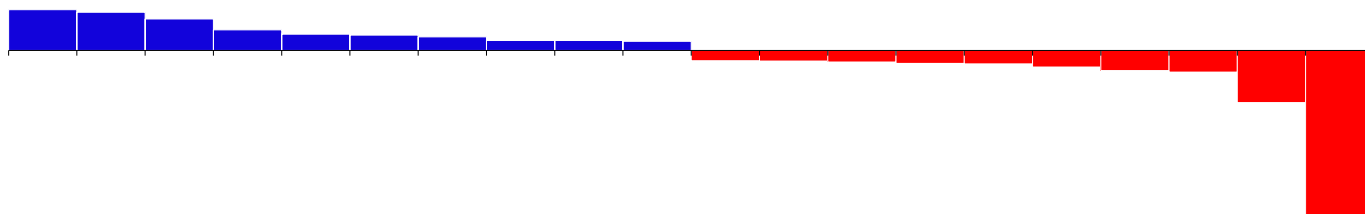


Index	Price	%1D	%1M	%1Yr.	PER	PBR	Mkt Cap
VN-Index	1,234	-0.2	5.6	-3.2	17.0	1.9	4,942,812
VN30 Index	1,241	-0.2	6.9	-4.1	13.8	1.8	3,577,613
VN Midcap	1,691	-0.3	8.5	-2.8	15.5	1.5	836,294
VN Smallcap	1,452	0.5	4.8	-8.1	23.4	1.1	252,929
HNX Index	251	0.4	9.2	-17.3	27.2	1.4	288,532
UpCom	93	0.0	8.3	0.9	12.1	1.6	1,109,679

Sector	%1D	%1M	%YTD	%1 YR.	PER	PBR	Mkt Cap
Retail	-0.3	7.0	28.4	0.8	20.9	3.1	107,686
Insurance	0.7	1.5	4.1	-16.7	18.8	1.6	47,351
Real Estate	-0.8	16.2	27.4	-15.6	17.7	1.9	952,889
Technology	1.4	7.1	26.6	7.0	20.5	3.9	122,025
Oil & Gas	-0.5	-0.7	42.7	2.0	45.2	2.7	65,471
Financial Services	-1.0	7.0	72.7	10.1	27.6	1.7	162,076
Utilities	0.0	1.7	8.8	-6.2	12.3	2.2	330,056
Travel & Leisure	0.8	2.3	-5.5	-20.0	n.a	9.3	96,178
Indus. Goods&Services	0.3	0.6	19.4	-0.3	13.0	1.7	136,289
Per.& Household Goods	-0.3	-1.0	0.9	-8.7	11.1	1.8	52,287
Chemicals	0.6	3.7	35.5	-13.6	8.2	1.6	177,327
Banks	-0.3	4.3	26.1	10.7	9.3	1.8	1,838,344
Car & Parts	-0.3	19.1	33.2	-1.0	14.5	1.2	23,872
Basic Resources	-0.4	2.8	53.0	9.1	28.3	1.5	214,256
Food & Beverage	-0.2	0.8	-2.6	-13.5	21.5	3.2	484,440
Media	-0.2	0.3	40.6	-26.3	16.9	0.9	1,238
Cons. & Materials	0.6	3.0	49.5	-6.9	24.8	1.4	117,136
Health Care	2.0	-2.6	24.8	15.5	15.5	2.3	38,023

Term	Price	%1D	%1W	%1M	%3M	%YTD	%1Yr.
Dollar index	103	-0.1	0.5	3.2	0.6	-0.4	-3.3
USD/JPY	146	0.1	1.6	5.0	7.0	11.1	9.2
USD/CNY	7	0.4	1.0	1.6	4.8	5.6	7.6
KRW/USD	1,331	0.4	1.9	5.1	-0.5	5.1	2.2
EUR/USD	1	-0.2	0.3	2.9	-0.5	-2.0	-7.0
USD/VND	23,980	0.7	1.0	1.4	2.2	1.5	2.5
WTI	82	-0.3	-0.8	9.1	15.7	2.5	-8.0
Gasoline	237	-18.4	-16.7	-10.3	-4.1	-3.6	-19.7
Natural gas	3	0.9	1.6	11.1	18.8	-37.0	-67.7
Coal	147	1.7	3.8	11.3	-11.2	-63.8	-64.1
Gold	1,904	-0.2	-1.1	-2.6	-5.6	4.4	7.0
China HRC	3,928	-0.1	-1.7	1.4	2.6	-5.3	-3.8

Contributors to VN Index



VRE (3.30%)	VHM (0.82%)	FPT (1.69%)	DGC (4.09%)	VJC (1.70%)	TCB (0.74%)	TPB (1.88%)	VGC (2.66%)	SIP (4.84%)	DHG (3.36%)	MSB (-2.08%)	SSB (-0.84%)	SSI (-1.54%)	STB (-1.25%)	ACB (-0.87%)	NVL (-2.35%)	HPG (-0.71%)	VNM (-0.82%)	BID (-1.26%)	VIC (-3.55%)
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Stock Feeds

Companies News

1) BAF - Food & Beverage: BAF Vietnam Agriculture Joint Stock Company (HoSE: BAF) has just announced the Resolution of the Board of Directors approving the syndicated loan with a maximum value of VND 500 billion granted by 3 international banks.

2) DHG - Health Care: The business results of DHG Pharma (DHG) in the first 6 months of the year showed many positive signals. However, the company is still lagging behind the plan set out at the beginning of the year.

3) DTG - Health Care: Since moving to the HNX in July, the share price of Tipharco Pharmaceutical JSC (DTG) has decreased by 21.9%. The company also just announced the closing of the right to pay dividends in 2022 in cash at rate of 5%.

4) FPT - Technology: Profit before tax is more than 5,000 billion dong after the first 7 months of 2023, an increase of nearly 20%. Profit from the Technology segment plays a key role, accounting for about 47% of the group's pre-tax profit structure.

Stock of the day

▶ Petrovietnam Fertilizer & Chemicals Corporation - DPM

DPM - Chemicals: Expected business activities in the last 6 months of 2023 and 2024 will be brighter. DPM believes that profits in the second quarter of 2023 have bottomed. It is likely that business results in the third and fourth quarters will improve markedly.



Cashflow Trend

Cash flow between industry groups (VNDbn)							
No	Sectors	% Liquidity Change AVG 1W	8/14/2023	8/15/2023	1W AVG	20 days Trend	
1	Technology	18.8	124	161	135		
2	Chemicals	16.0	687	980	846		
3	Automobiles & Parts	10.1	371	352	319		
4	Health Care	6.5	26	33	31		
5	Real Estate	-0.4	6,283	5,701	5,727		
6	Utilities	-5.1	246	282	297		
7	Retail	-6.5	760	633	677		
8	Insurance	-7.9	41	42	45		
9	Travel & Leisure	-9.1	148	130	143		
10	Construction & Materials	-11.9	1,546	1,255	1,424		
11	Oil & Gas	-17.8	150	128	156		
12	Personal & Household Goods	-19.9	164	169	210		
13	Banks	-20.4	2,998	2,525	3,173		
14	Industrial Goods & Services	-20.8	687	664	838		
15	Financial Services	-22.1	4,057	2,047	2,626		
16	Food & Beverage	-22.3	1,428	1,158	1,491		
17	Basic Resources	-22.8	2,095	1,253	1,624		

Top 15 tickers in trading value 1 week									
Ticker	Company name	Sectors	Performance				Trading Stats		
			Close price	%1D	%1W	%YTD	%Turnover Change	Turnover (VND bn)	Trend
DGC	Ducgiang Chemicals	Chemicals	76,400	4.1	2.4	29.7	61.0	481.0	
VIX	VIX Securities	Financial Services	17,150	0.9	6.5	203.4	29.4	510.1	
NVL	Novaland	Real Estate	20,750	-2.4	2.0	48.2	11.9	1029.6	
MWG	Mobile World Investment	Retail	54,000	-0.4	0.7	25.9	27.1	460.8	
TPB	Tien Phong Bank	Banks	19,000	1.9	0.0	25.6	70.1	228.2	
AAA	An Phat Bioplastics	Chemicals	12,000	1.7	-0.8	75.7	56.8	168.0	
VPB	VPBank	Banks	22,000	0.2	-0.9	22.9	17.7	401.9	
FPT	FPT Corp	Technology	84,000	1.7	-0.2	25.6	65.0	139.1	
DRH	DRH Holdings	Real Estate	7,910	6.9	9.4	70.1	126.2	92.1	
VHM	Vinhomes	Real Estate	61,700	0.8	-1.8	28.5	15.8	352.2	
VGC	Viglacera Corporation	Construction & Materials	48,250	2.7	2.2	42.8	108.9	90.2	
KBC	Kinh Bac Urban Development	Real Estate	32,600	0.5	1.9	34.7	15.5	328.7	
FCN	FECON	Construction & Materials	17,800	2.0	4.1	89.4	66.1	109.9	
VPG	Viet Phat Import Export Trading Investment	Basic Resources	22,000	5.8	6.3	69.9	80.0	90.5	
VCG	Vinaconex Group	Construction & Materials	26,600	0.0	0.0	69.6	12.8	293.9	

Top 10 tickers in Trading volume 1 week									
Ticker	Company name	Sectors	Performance				Trading Stats		
			Close price	%1D	%1W	%YTD	%Volume Change	Volume (x1000)	Trend
CKG	Kien Giang Construction	Real Estate	25,800	3.2	6.4	29.0	6.6	25.80	
VGC	Viglacera Corporation	Construction & Materials	48,250	2.7	2.2	42.8	3.3	48.25	
LHG	Long Hau Corp	Real Estate	28,700	2.7	2.9	34.4	3.2	28.70	
DPR	Dong Phu Rubber	Chemicals	62,500	1.6	0.0	18.4	1.1	62.50	
BMI	Bao Minh Insurance	Insurance	26,450	3.7	2.1	23.0	2.6	26.45	
DRH	DRH Holdings	Real Estate	7,910	6.9	9.4	70.1	8.4	7.91	
DC4	DIC Holdings Construction	Construction & Materials	11,150	3.7	7.2	65.4	5.7	11.15	
TVS	Thien Viet Securities	Financial Services	23,850	0.0	0.4	32.2	1.8	23.85	
RDP	Rang Dong Plastic	Chemicals	9,290	0.4	1.9	32.7	2.6	9.29	
AGM	An Giang Import Export	Food & Beverage	10,900	6.9	-19.3	13.7	-6.8	10.90	

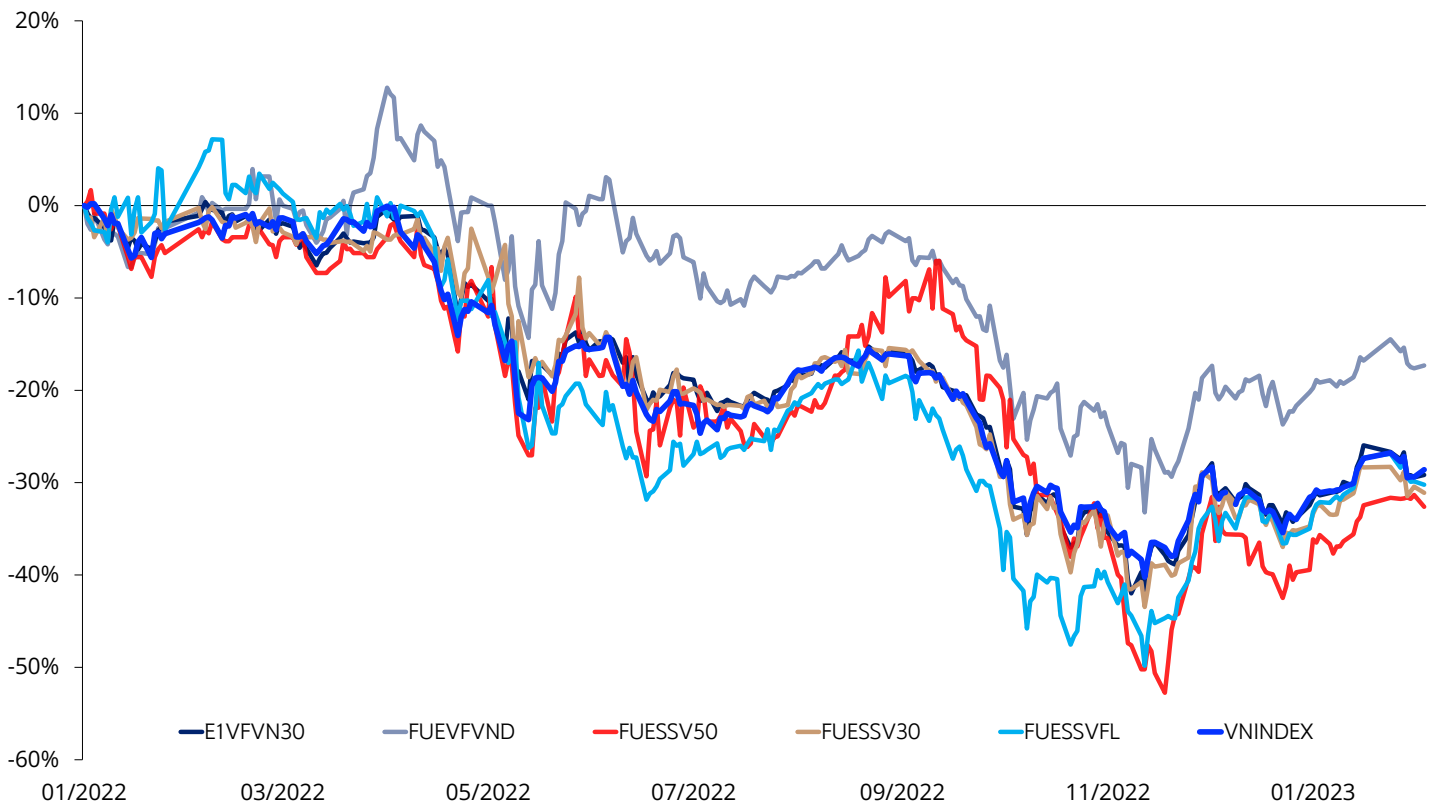
Top net buy and sell of foreign investors during the day (VNDbn)					Foreign Investor Trading Activities (VNDbn)			
Top Sell Tickers		Top Buy Tickers			Date	Buy	Sell	Net value
(138.41)	BCM	CTG	77.84		8/15/2023	1063.24	1597.31	-534.1
(131.87)	VPB	HSG	60.59		8/14/2023	1219.8	2171.39	-951.6
(107.54)	VIC	DIG	42.14		8/11/2023	1272.58	1332.01	-59.4
(85.29)	MSN	VHM	31.53		8/10/2023	1146.74	1487.72	-341.0
(67.00)	SSI	VGC	27.90		8/9/2023	1603.83	1264.78	339.1
(42.45)	E1VFN30	NVL	27.07		8/8/2023	1328.59	1565.08	-236.5
(36.50)	VCB	VRE	24.83		8/7/2023	4327.79	4722.11	-394.3
(35.23)	FUEVFNVD	DXG	19.78		8/4/2023	1565.57	1385.24	180.3
(32.48)	HPG	SBT	13.60		8/3/2023	1103.6	1178.09	-74.5
(31.79)	BVH	DGC	9.67		8/2/2023	1914.35	1756.84	157.5
					8/1/2023	1684.58	1963.79	-279.2
					7/31/2023	1512.81	1417.78	95.0
					7/28/2023	1677.26	1260.95	416.3
					7/27/2023	1499.89	1181.56	318.3
					7/26/2023	1877.72	1466.78	410.9
					7/25/2023	1604.72	1614.69	-10.0

ETF

Trading statistics of domestic ETFs

No	Name	Ticker	Price (VND)	%1D	%1M	YTD	Trading volume	Trading value (VND bn)	20-sessions liquidity
1	DCVFMVN30 ETF Fund	E1VFN30	21,290	0.4%	7.2%	22.9%	3,309,300	70.4	
2	SSIAM VNX50 ETF	FUESSV50	18,900	2.2%	8.6%	34.5%	33,200	0.6	
3	SSIAM VNFIN LEAD ETF	FUESSVFL	19,120	0.6%	6.3%	33.2%	143,000	2.7	
4	DCVFMVN Diamond ETF	FUEVFNVD	26,250	0.4%	5.0%	17.2%	2,398,700	62.9	
5	VinaCapital VN100 ETF	FUEVN100	16,240	0.1%	8.3%	25.4%	76,000	1.2	
6	SSIAM VN30 ETF	FUESSV30	15,200	0.0%	7.7%	21.8%	13,100	0.2	
7	MAFAM VN30 ETF	FUEMAV30	14,680	-0.1%	6.5%	23.2%	9,500	0.1	
8	IPAAM VN100 ETF	FUEIP100	8,980	-0.1%	8.1%	24.4%	1,300	0.0	
9	KIM Growth VN30 ETF	FUEKIV30	8,200	0.1%	7.6%	23.3%	49,300	0.4	
10	DCVFMVN Mid Cap ETF	FUEDCMID	10,490	0.4%	8.3%	29.5%	800	0.0	
11	KIM Growth VNFINSELECT ETF	FUEKIVFS	10,940	-0.5%	6.2%	29.9%	48,200	0.5	
12	MAFAM VNDIAMOND ETF	FUEMAVND	10,960	0.3%	4.8%	n.a	100	0.0	
13	FPT CAPITAL VNX50 ETF	FUEFCV50	16,590	7.0%	18.5%	n.a	1,100	0.0	

Performance of ETFs vs VNINDEX



Statistics of domestic ETFs

No	Ticker	Management company	Inception date	Tracking Index	AUM (USD mn)	Fund flow 1M (USD mn)	Fund flow 3M (USD mn)	Annualized Return (%)	Standard deviation 1Y (%)	Beta	Dividend yield (%)	PB (x)	PE (x)	Weight of top 10 holdings (%)
1	DCVFMVN30 ETF	DCVFM	8/14/2014	VN30	373.4	-1.2	-23.3	-2.6	25.6	1.0	1.90	1.8	12.6	58.8
2	SSIAM VNX50 ETF	SSIAM	12/15/2014	FUESSV50	6.7	0.0	0.0	-0.6	47.2	1.0	1.70	1.7	12.7	48.4
3	SSIAM VNFIN LEAD	SSIAM	2/24/2020	VNFL	178.7	-2.7	-2.4	5.6	36.0	0.8	1.39	1.4	9.1	84.1
4	DCVFMVN Diamond	DCVFM	5/12/2020	VND	864.9	-1.9	-9.4	-2.7	30.7	0.9	1.89	1.9	10.9	86.5
5	VinaCapital VN100	Vinacapital	6/16/2020	VN100	n.a	0.0	0.0	-2.4	28.0	0.9	1.71	1.7	13.0	42.2
6	SSIAM VN30 ETF	SSIAM	7/27/2020	VN30	4.2	0.1	0.4	-5.0	33.3	0.9	1.87	1.8	12.2	60.7
7	MAFAM VN30 ETF	MAFAM	12/8/2020	VN30	n.a	-0.1	-0.3	-3.8	25.4	1.0	n.a	n.a	n.a	n.a
8	IPAAM VN100 ETF	I.P.A	7/28/2021	VN100	n.a	0.0	0.0	-3.6	23.7	1.0	n.a	n.a	n.a	n.a
9	KIM Growth VN30	KIM	1/6/2022	VN30TR	12.5	10.8	10.2	-3.0	33.9	0.9	1.86	1.8	12.2	60.9
10	DCVFMVN Mid Ca	DCVFM	9/29/2022	VNMidcap	4.5	0.4	0.4	n.a	33.9	1.2	1.46	1.5	13.9	45.2
11	KIM Growth VNFIN	KIM	11/3/2022	VNFS	12.8	1.4	8.7	n.a	22.5	1.1	1.65	1.4	8.8	69.2
12	MAFAM VNDIAMOND	MAFAM	3/2/2023	VND	n.a	4.3	5.0	n.a	n.a	1.0	n.a	n.a	n.a	n.a
13	FPT CAPITAL VNX50	FPT Fund	5/25/2023	VNX50	n.a	0.0	0.0	n.a	n.a	2.9	n.a	n.a	n.a	n.a

Source: Bloomberg

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