

Daily report

Market Summary:

## "Struggling"

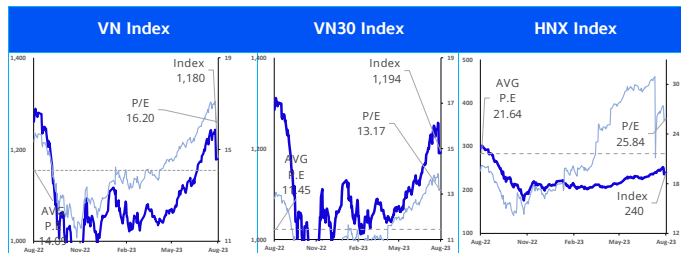
▶ In Tuesday's trading session, liquidity remained at a high value, two main indexes gained slightly, showing cautious sentiment of investors.

▶ At the end of the session, VN-Index gained 0.73 points, equivalent to 0.06%, reaching 1,180.49 points; HNX-Index increased 1.68 points (0.71%), reaching 239.65 points. Market liquidity reached VND 21.7 trillion, equivalent to about 1,056 million shares traded. Foreign investors net sold VND 725.9 billion, focusing mainly on HPG and STB.

▶ SSB (+6.02%), SSI (+6.41%), GAS (+1.21%) were the three tickers that contributed the most to the market's green color. On the contrary, VCB (-1.56%), VIC (-1.98%), VHM (-0.89%) were the three tickers that lost the most points of the market.

▶ Consulting, support services and Retail are two groups with impressive gainers today with typical stocks such as TV2 and MWG.

▶ Technical perspective: VNINDEX dropped sharply in the morning and touched 1.149 points, then the demand pulled the market up and closed at 1,180 – forming a retreat candle. With 2 candles yesterday and today, it can be seen that the investors seem to be ready to buy when the market drops to the 1,160 area. This is also a strong support area with Fibi 0.5 and 0.618 respectively. Support zone is at 1,160, resistance zone is at 1,200.

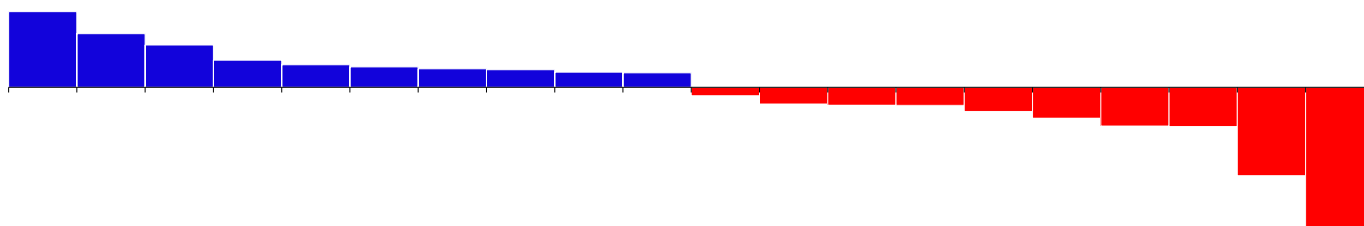


Index	Price	%1D	%1M	%1Yr.	PER	PBR	Mkt Cap
VN-Index	1,180	0.1	-0.5	-6.3	16.2	1.8	4,714,662
VN30 Index	1,194	0.3	0.6	-7.2	13.2	1.7	3,430,938
VN Midcap	1,614	1.2	1.0	-5.8	14.6	1.4	786,297
VN Smallcap	1,356	0.9	-3.0	-13.1	21.8	1.0	235,942
HNX Index	240	0.7	2.0	-18.7	25.8	1.3	273,608
UpCom	90	0.0	1.5	-2.9	12.1	1.6	1,073,385

Sector	%1D	%1M	%YTD	%1Yr.	PER	PBR	Mkt Cap
Retail	2.4	-4.8	20.4	0.8	19.6	2.9	101,015
Insurance	1.6	-3.3	1.2	-17.7	18.3	1.6	46,029
Real Estate	-0.7	3.4	16.7	-22.0	16.2	1.7	872,898
Technology	0.9	6.3	29.5	12.2	21.0	4.0	124,831
Oil & Gas	0.4	-6.4	42.7	-6.0	42.2	2.5	61,242
Financial Services	3.9	4.8	71.6	8.8	27.4	1.7	161,044
Utilities	0.5	-0.7	6.8	-7.8	12.1	2.2	323,955
Travel & Leisure	1.7	-1.6	-9.5	-22.6	n.a	8.9	92,142
Indus. Goods&Services	0.5	-3.8	14.6	-2.9	12.5	1.6	130,832
Per.& Household Goods	0.1	-4.1	-1.5	-10.4	10.8	1.8	51,060
Chemicals	-1.0	-7.1	23.3	-18.3	7.5	1.4	161,429
Banks	-0.3	0.2	22.6	9.9	9.1	1.7	1,787,411
Car & Parts	3.1	13.1	26.2	-2.8	13.7	1.1	22,614
Basic Resources	-0.2	-6.9	42.6	4.4	26.3	1.4	199,632
Food & Beverage	-0.6	-3.8	-6.5	-18.5	20.6	3.0	465,308
Media	-0.8	-8.8	29.4	-29.8	15.6	0.8	1,140
Cons. & Materials	0.7	-6.2	38.1	-13.2	22.9	1.3	108,159
Health Care	-0.1	-7.5	20.4	10.1	15.0	2.2	36,702

Term	Price	%1D	%1W	%1M	%3M	%YTD	%1Yr.
Dollar index	103	-0.2	-0.1	2.0	-0.1	-0.4	-5.4
USD/JPY	146	-0.3	0.1	3.0	5.1	11.1	6.0
USD/CNY	7	0.1	0.1	1.5	3.7	5.7	6.5
KRW/USD	1,336	-0.5	0.4	4.3	1.3	5.5	-0.3
EUR/USD	1	-0.1	0.0	1.4	-0.9	-1.9	-8.8
USD/VND	23,862	0.2	-0.4	0.8	1.8	1.0	1.9
WTI	81	-0.2	-0.5	4.6	11.9	0.4	-10.7
Gasoline	237	-14.5	-16.7	-15.4	-10.5	-3.6	-18.0
Natural gas	3	-1.5	-2.5	-4.4	8.0	-42.1	-73.2
Coal	149	-0.2	1.9	12.2	-8.0	-63.1	-64.1
Gold	1,900	0.2	-0.1	-2.8	-3.7	4.1	9.4
China HRC	3,914	0.0	-0.4	0.1	3.1	-5.6	-1.1

### Contributors to VN Index



SSB (6.02%)	SSI (6.41%)	GAS (1.21%)	MWG (2.04%)	TCB (1.07%)	KBC (4.67%)	BID (0.44%)	VCI (5.20%)	EIB (2.39%)	HVN (2.80%)	POW (-1.54%)	BCM (-1.30%)	GVR (-1.30%)	MSN (-0.89%)	VPB (-0.96%)	SAB (-1.77%)	CTG (-1.41%)	VHM (-0.89%)	VIC (-1.98%)	VCB (-1.56%)
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# Stock Feeds

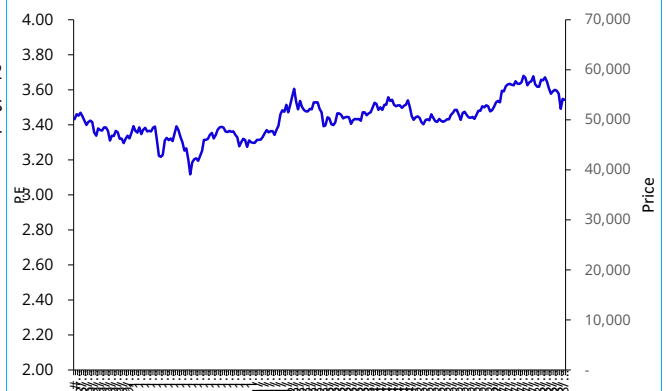
## Companies News

- 1) LCG - Construction & Materials:** Lizen Joint Stock Company (HoSE: LCG) leading the consortium of contractors winning the VND 1,411 billion package under the Bien Hoa - Vung Tau expressway project recorded a 74.7% decrease in profit after tax compared to the same period in 2022.
- 2) NVL - Real Estate:** NVL is late in meeting bonds interest payment responsibility. Novaland however said that the principal of 150 billion dong of this bond lot has been agreed by bondholders to extend the maturity.
- 3) VIC - Real Estate:** VinFast said that EPA has just certified the travel distance of the VF 9 electric car model to be 330 miles (Eco version) and 291 miles (Plus version). This is a parameter that exceeds the original announcement of the Vietnamese car company.
- 4) TDM - Utilities:** TDMWATER will buy shares in DNP Quang Binh Water Infrastructure Investment JSC with the ratio from 20% to less than 50%. After the transaction, DNP Quang Binh Water Infrastructure Investment JSC will become an associate company of Thu Dau Mot Water JSC.

## Stock of the day

### ▶ Vietnam Technological and Commercial Joint Stock Bank - TCB

**TCB - Banks:** President Ho Hung Anh's daughter wants to buy more than 82 million Techcombank shares, worth about VND 2,700 billion. The transaction is expected to be carried out during the period from 25/8 to 19/9/2023 by order matching and by agreement.



# Cashflow Trend

Cash flow between industry groups (VNDbn)							
No	Sectors	% Liquidity Change AVG 1W	8/21/2023	8/22/2023	1W AVG	20 days Trend	
1	Automobiles & Parts	20.1	262	374	311		
2	Retail	14.0	574	835	733		
3	Financial Services	6.7	3,426	4,101	3,842		
4	Utilities	-5.6	214	290	307		
5	Insurance	-5.9	68	64	68		
6	Travel & Leisure	-12.0	146	133	151		
7	Food & Beverage	-16.5	1,178	1,187	1,421		
8	Basic Resources	-16.9	1,467	1,442	1,736		
9	Construction & Materials	-19.9	1,055	1,297	1,619		
10	Banks	-21.2	3,898	3,322	4,215		
11	Chemicals	-21.8	920	723	925		
12	Technology	-23.3	237	228	297		
13	Personal & Household Goods	-25.4	141	137	183		
14	Real Estate	-26.1	5,543	4,708	6,368		
15	Industrial Goods & Services	-31.0	735	654	949		
16	Oil & Gas	-34.1	135	123	186		
17	Health Care	-34.2	19	21	32		

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
SSI	SSI Securities Corp.	Financial Services	30,700	6.4	7.0	73.4	41.6	1516.1	
LDG	LDG Investment	Real Estate	5,050	-2.7	-20.6	26.3	400.9	158.2	
TCH	Hoang Huy Investment Financial Services	Automobiles & Parts	12,700	6.7	-3.1	87.0	28.6	293.3	
VCI	Viet Capital Securities	Financial Services	42,500	5.2	-1.5	82.8	16.6	307.0	
FRT	FPT Retail	Retail	74,800	2.9	0.7	24.7	45.2	122.4	
VIX	VIX Securities	Financial Services	17,000	3.7	-0.9	200.8	5.6	675.1	
DGW	Digiworld Corporation	Retail	51,900	6.9	-3.9	37.5	26.0	171.2	
SAB	SABECO	Food & Beverage	150,000	-1.8	-4.6	-10.1	52.1	58.8	
FTS	FPT Securities	Financial Services	31,250	2.8	-4.6	81.9	27.3	73.6	
TV2	Power Engineering Consulting 2	Industrial Goods & Services	40,100	6.9	4.0	79.8	61.5	37.0	
ELC	ELCOM CORP.	Technology	23,550	6.8	12.7	142.8	65.2	16.7	
SIP	Saigon VRG Investment	Media	122,200	-0.7	-6.0	-3.4	52.9	18.3	
KDC	KIDO Group	Food & Beverage	63,000	0.5	-0.5	-3.1	9.9	66.8	
AGR	AgriBank Securities	Financial Services	15,200	1.3	-6.5	102.7	14.7	46.2	
ADS	Damsan YarnTex	Personal & Household Goods	14,950	1.7	-12.3	82.7	37.4	19.2	

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
FRT	FPT Retail	Retail	74,800	2.9	0.7	24.7	4.9	74.80	
TV2	Power Engineering Consulting 2	Industrial Goods & Services	40,100	6.9	4.0	79.8	7.2	40.10	
ELC	ELCOM CORP.	Technology	23,550	6.8	12.7	142.8	11.2	23.55	
SSI	SSI Securities Corp.	Financial Services	30,700	6.4	7.0	73.4	6.6	30.70	
DHC	Dong Hai Bentre	Basic Resources	40,000	1.8	-2.6	22.0	0.1	40.00	
ACL	Cuu Long Fisheries	Food & Beverage	13,100	0.8	-2.6	24.2	-0.1	13.10	
PTL	Petroland	Real Estate	4,120	1.5	-12.7	26.8	-8.4	4.12	
LDG	LDG Investment	Real Estate	5,050	-2.7	-20.6	26.3	-14.1	5.05	
ADS	Damsan YarnTex	Personal & Household Goods	14,950	1.7	-12.3	82.7	-7.8	14.95	
SAB	SABECO	Food & Beverage	150,000	-1.8	-4.6	-10.1	-3.4	150.00	

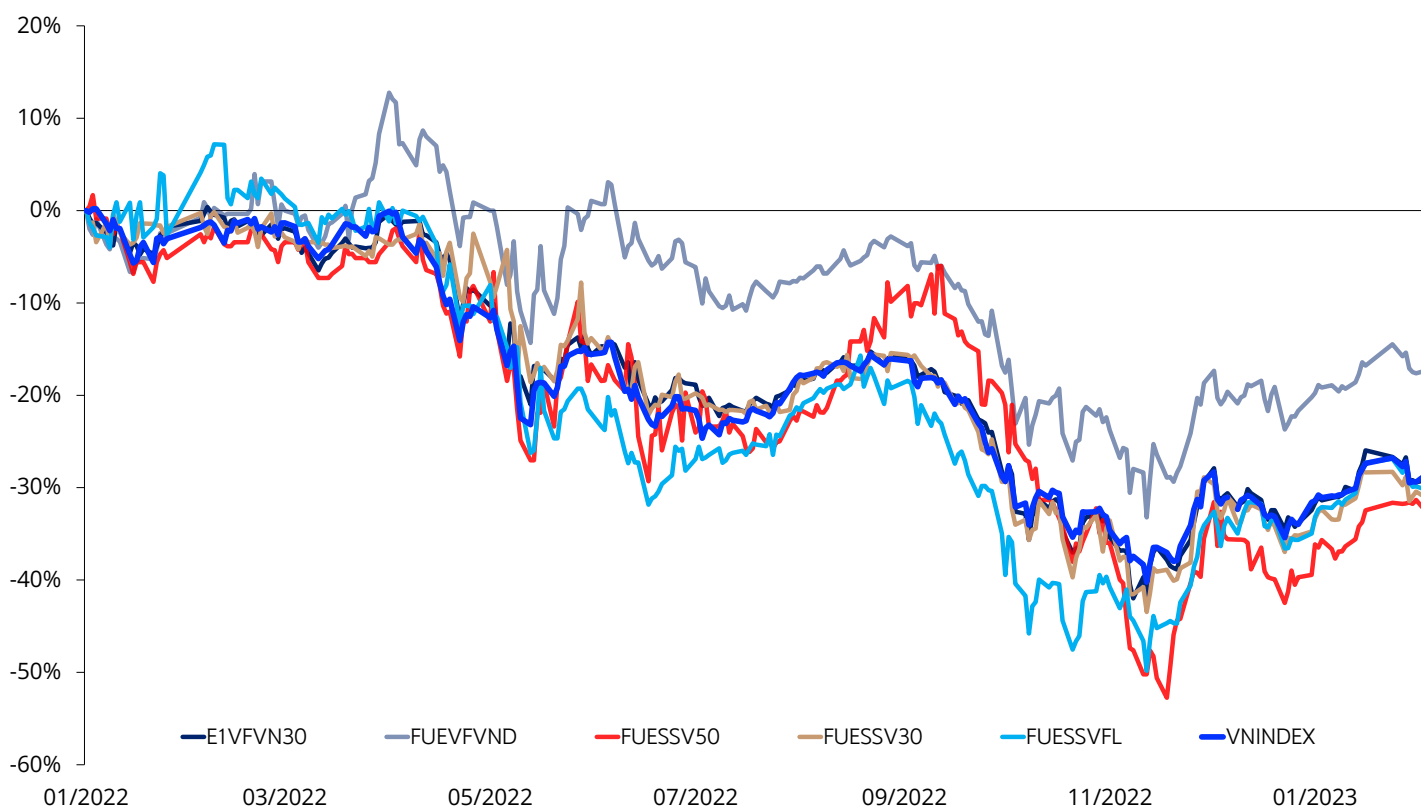
Top net buy and sell of foreign investors during the day (VNDbn)				Foreign Investor Trading Activities (VNDbn)			
Top Sell Tickers		Top Buy Tickers		Date	Buy	Sell	Net value
(266.54)	HPG	VIC	36.26	8/22/2023	1522.42	2248.96	-726.5
(199.23)	STB	DGW	34.82	8/21/2023	2664.63	2570.76	93.9
(99.28)	VPB	VCI	32.61	8/18/2023	2554.69	2125.97	428.7
(67.47)	MWG	FRT	30.59	8/17/2023	1931.68	1810.97	120.7
(51.46)	FUEVFNVD	TPB	27.34	8/16/2023	1227.32	1251.14	-23.8
(45.57)	VCB	VNM	13.94	8/15/2023	1063.24	1597.31	-534.1
(43.07)	VND	VCG	13.29	8/14/2023	1219.8	2171.39	-951.6
(39.68)	CTG	KDH	11.79	8/11/2023	1272.58	1332.01	-59.4
(39.43)	SAB	VRE	9.93	8/10/2023	1146.74	1487.72	-341.0
(38.95)	MSN	KBC	9.56	8/9/2023	1603.83	1264.78	339.1
				8/8/2023	1328.59	1565.08	-236.5
				8/7/2023	4327.79	4722.11	-394.3
				8/4/2023	1565.57	1385.24	180.3
				8/3/2023	1103.6	1178.09	-74.5
				8/2/2023	1914.35	1756.84	157.5
				8/1/2023	1684.58	1963.79	-279.2

# 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	20,550	0.5%	1.5%	18.6%	524,700	10.7	
2	SSIAM VNX50 ETF	FUESSV50	18,600	2.7%	3.3%	32.4%	15,300	0.3	
3	SSIAM VNFIN LEAD ETF	FUESSVFL	18,430	-0.7%	1.8%	28.4%	306,100	5.6	
4	DCVFMVN Diamond ETF	FUEVFNVD	25,300	0.0%	-0.8%	12.9%	2,777,900	69.6	
5	VinaCapital VN100 ETF	FUEVN100	15,690	0.8%	3.0%	21.2%	185,600	2.8	
6	SSIAM VN30 ETF	FUESSV30	14,550	-1.0%	0.3%	16.6%	9,700	0.1	
7	MAFM VN30 ETF	FUEMAV30	14,080	0.1%	0.1%	18.1%	13,600	0.2	
8	IPAAM VN100 ETF	FUEIP100	8,400	-0.9%	-0.6%	16.3%	6,000	0.1	
9	KIM Growth VN30 ETF	FUEKIV30	7,800	-0.5%	0.8%	17.3%	69,300	0.5	
10	DCVFMVN Mid Cap ETF	FUEDCMID	9,980	0.8%	0.3%	23.2%	59,200	0.6	
11	KIM Growth VNFINSELECT ETF	FUEKIVFS	10,510	-0.4%	1.6%	24.8%	55,200	0.6	
12	MAFM VNDIAMOND ETF	FUEMAVND	10,640	0.2%	-1.2%	n.a	21,600	0.2	
13	FPT CAPITAL VNX50 ETF	FUEFCV50	16,590	0.0%	53.3%	n.a	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	337.6	-26.3	-44.7	-5.7	25.9	1.0	1.90	1.8	12.6	58.8
2	SSIAM VNX50 ETF	SSIAM	12/15/2014	FUESSV50	6.4	0.1	0.1	-7.0	47.3	1.0	1.71	1.7	12.2	48.6
3	SSIAM VNFIN LEAD	SSIAM	2/24/2020	VNFL	183.9	-2.9	-2.7	-2.0	36.1	0.8	1.36	1.3	8.9	85.2
4	DCVFMVN Diamond	DCVFM	5/12/2020	VND	825.6	-16.2	-21.6	-6.4	31.0	0.9	1.89	1.9	10.9	86.5
5	VinaCapital VN100	Vinacapital	6/16/2020	VN100	n.a	0.0	0.0	-5.3	27.9	0.9	1.71	1.7	13.0	42.2
6	SSIAM VN30 ETF	SSIAM	7/27/2020	VN30	4.2	0.1	0.3	-7.6	33.5	0.9	1.86	1.7	11.7	60.7
7	MAFM VN30 ETF	MAFM	12/8/2020	VN30	n.a	-0.1	-0.3	-7.6	25.8	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	-9.4	24.0	1.0	n.a	n.a	n.a	n.a
9	KIM Growth VN30	KIM	1/6/2022	VN30TR	12.6	5.0	10.2	-6.3	34.2	0.9	1.85	1.7	11.6	60.9
10	DCVFMVN Mid Ca	DCVFM	9/29/2022	VNMidcap	4.3	0.4	0.4	n.a	34.4	1.2	1.46	1.5	13.9	45.2
11	KIM Growth VNFIN	KIM	11/3/2022	VNFS	12.9	1.4	8.7	n.a	22.7	1.0	1.57	1.3	8.5	68.5
12	MAFM VNDIAMOND	MAFM	3/2/2023	VND	n.a	3.3	4.9	n.a	n.a	1.1	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	0.1	n.a	n.a	n.a	n.a

Source: Bloomberg

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