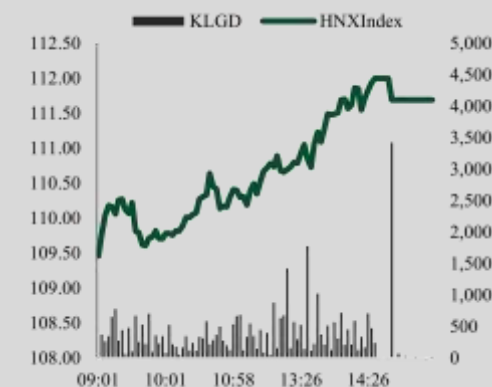
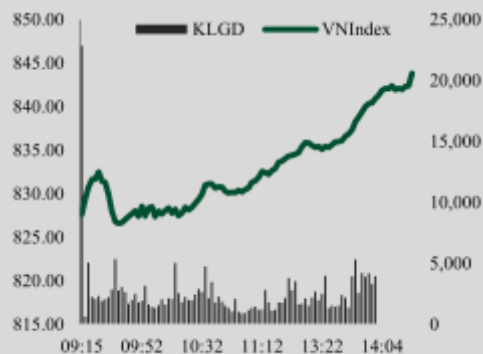


### MARKET SNAPSHOT

VN – Index gained sharply today thanks to the positive movements of the world's stock markets. Liquidity remained same as the previous session in terms of both volume and value.

Market Stat	HSX	HNX
Index	843.49	111.69
+/- (%)	+2.23%	+1.76%
Volume (share)	303,545,946	35,907,400
Value (VNDmln)	4,655.50	330.60
Advancers	306	107
Unchanged	39	49
Decliners	81	52

Derivative product	Index	Change
VN30F1M	768.60	+16.10
VN30F2M	760.00	+16.00
VN30F1Q	755.00	+15.20
VN30F2Q	751.00	+13.10



### THE UPWARD TREND SPREADED OUT, VN – INDEX GAINED SHARPLY

- VN – Index gained sharply today thanks to the positive movements of the world's stock markets. Liquidity remained same as the previous session in terms of both volume and value.
- The strong cash flow was activated at the open, VN – Index easily surpassed 830 in the first half of the morning session. The upward trend was maintained in the remaining time of the morning session, especially in the afternoon session, regarding the information that PMI of Vietnam recovered strongly to 51.10 in June, along with some banks lowering interest rates, with the upward momentum of the blue-chips such as the Banking, Retail sectors and the group of VIC, VHM, VRE, of which the strong gain of VCB was noteworthy. This, accordingly, made VN - Index extended its upward momentum to more than 18 points at the close. Liquidity did not change much comparing to the previous session, with a total trading value of about VND 5,162 billion on all three stock exchanges. Closing the day, VN – Index advanced 18.38 points, or 2.23%, to reach 843.49, while HNX – Index reached 111.69 points (+1.76%).
- In our opinion, VN Index has shown a relatively positive recovery after testing the supportive threshold of 820, showing that this is a relatively strong supportive threshold in the short term. Besides, some momentum indicators have also gained from the oversold area, indicating that the bullish momentum may accelerate in the next few sessions. In the current movements of VN - Index are showing more optimistic signals of the market. In the next sessions, this index may retest the threshold of 850 points. Therefore, we recommend that investors should prioritize disbursement with short-term "surfing" purpose for stocks with positive business results in the rest of 2020, but should pay attention to the new movements in the world's financial markets to promptly take profit or cut losses to ensure compliance with investment disciplines.

#### Market outlook

<u>Short term</u>	<u>Medium term</u>	<u>Long term</u>
NEUTRAL	NEUTRAL	POSITIVE

### Market highlights

- **Fed Chairman warned the second wave of infection could engulf the US economy.** US Federal Reserve Chairman Jerome Powell expressed concern that the US economy has not really gotten out of trouble yet. In a hearing before Congress yesterday (June 30<sup>th</sup>), he said that the recovery of the world's largest economy could be reversed if the US failed to control the Covid-19 epidemic. "The second wave of infection could force the government and the people to stop economic activities again," he said. "A sharp increase in the number of infections can erode confidence in the economic recovery - which is important to boost spending and economic activities." Besides, the Fed Chairman pledged to keep interest rates low and provide liquidity support tools to ensure the smooth operation of the financial market.
- **Eliminated COVID-19, restoring business confidence, PMI Vietnam rebounded in June.** According to the PMI Vietnam Manufacturing PMI report, Vietnam's manufacturing sector grew again in June. The success of the COVID-19 epidemic and the improved business confidence helped to increase the volume and number of new orders.

## TECHNICAL VIEW

### VN Index



VN – Index rebounded from the lower Bollinger Band, but liquidity did not have any significant breakouts and the RSI is moving to the zone of oversold. Resistance at 905 - 910, support at 800 - 810.

### HNX Index



HNX Index fluctuated similar to VN Index. It is expected to maintain the uptrend this week. Resistance is at 121.50 – 122.00, support is at 107.50 -108.00.

## MARKET STATISTICS

### TOP 5 MOVE INDEX UP STOCKS

#### HOSE

Ticker	Price	% Change	Index	Volume
VCB	82,700	2.99	2.538	404,440
VIC	91,000	2.25	1.929	92,060
BID	39,200	3.43	1.491	769,310
VHM	76,900	1.85	1.337	936,450
SAB	163,000	3.82	1.097	58,620

#### HNX

Ticker	Price	% Change	Index	Volume
ACB	23,200	1.75	0.632	1.67MLN
SHB	13,200	1.54	0.262	1.49MLN
SHS	12,700	7.63	0.131	2.08MLN
DL1	29,000	9.85	0.118	100
CEO	8,000	9.59	0.099	2.27MLN

### TOP 5 MOVE INDEX DOWN STOCKS

#### HOSE

Ticker	Price	% Change	Index	Volume
HPX	27,000	-5.59	-0.105	633,280
TCH	20,500	-3.76	-0.083	1.82MLN
HDB	24,550	-1.01	-0.070	926,460
NVL	61,300	-0.33	-0.055	768,550
GEG	21,250	-3.41	-0.044	488,880

#### HNX

Ticker	Price	% Change	Index	Volume
IDC	17,700	-1.67	-0.045	15,700
CTB	30,600	-9.73	-0.027	100
CTX	7,500	-9.64	-0.016	5,500
VNT	55,100	-9.67	-0.014	100
TAR	19,500	-2.50	-0.010	387,300

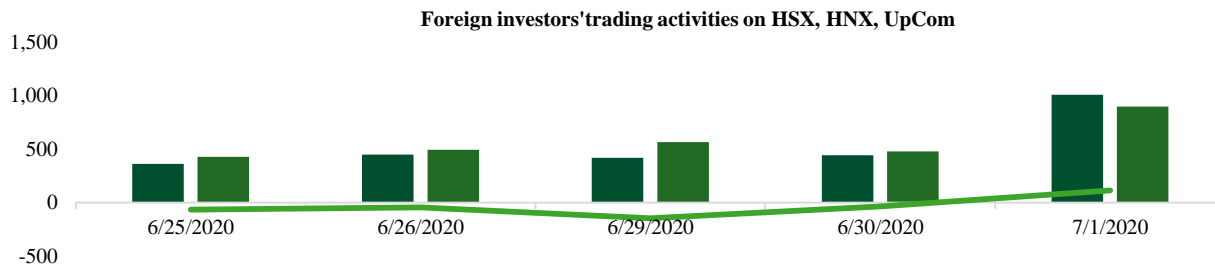
### TOP 5 GAINING STOCKS WITH EXTRAORDINARY VOLUME INCREASE

#### HOSE

Ticker	Market Cap	Price	Volume	% Change
HHS	1,142.94	4,160	3,410,850	6.94
FLC	2,747.69	3,870	32,916,220	6.91
BCG	707.44	6,550	456,780	6.85
KSB	1,215.51	22,700	1,232,390	6.82
FRT	1,856.07	23,500	739,900	6.82

#### HNX

Ticker	Market Cap	Price	Volume	% Change
TVC	400.17	10,000	1,695,800	9.89
DTD	302.35	12,300	194,100	4.24
S99	728.73	13,900	544,600	3.73
NVB	3,498.51	8,600	3,331,400	1.18
HHP	198.00	11,000	258,400	0.92


**TOP 5 STOCKS NET BOUGHT BY FOREIGN INVESTORS**
**HOSE**

Ticker	Price	Buying value (VND)	Selling value (VND)	Net value (VND)
PLX	45,100	180,234.90	121.05	180,113.85
VNM	114,700	33,410.99	8,075.32	25,335.68
VRE	26,450	16,063.22	1,104.82	14,958.40
MSN	55,500	10,780.51	638.77	10,141.74
VHM	76,900	12,080.46	2,873.30	9,207.16

**HNX**

Ticker	Price	Buying value (VND)	Selling value (VND)	Net value (VND)
PGT	3,900	429.40	-	429.40
WCS	204,000	100.54	-	100.54
BAX	41,000	82.00	-	82.00
PLC	15,200	75.35	-	75.35
NDN	17,800	34.90	-	34.90

**UPCOM**

Ticker	Price	Buying value (VND)	Selling value (VND)	Net value (VND)
VTP	134,000	1,741.54	536.69	1,204.85
MCH	70,000	700.00	-	700.00
BSR	7,000	398.70	0.70	398.00
VAV	52,200	375.84	-	375.84
BCM	26,600	238.09	-	238.09

**TOP 5 STOCKS NET SOLD BY FOREIGN INVESTORS**
**HOSE**

Ticker	Price	Buying value (VND)	Selling value (VND)	Net value (VND)
HDG	19,400	90.90	22,110.00	22,019.10
E1VFN30	13,300	8,729.12	30,389.52	21,660.40
DBC	45,700	2,222.17	22,787.27	20,565.10
POW	9,800	2,361.36	18,164.34	15,802.98
HDB	24,550	1,879.40	17,554.90	15,675.51

**HNX**

Ticker	Price	Buying value (VND)	Selling value (VND)	Net value (VND)
SHS	12,700	11.90	662.29	650.39
SHB	13,200	11.61	257.40	245.79
DHP	9,700	-	129.01	129.01
THT	6,400	3.84	115.70	111.86
HUT	2,600	-	49.75	49.75

**UPCOM**

Ticker	Price	Buying value (VND)	Selling value (VND)	Net value (VND)
ACV	58,800	2,383.25	10,786.79	8,403.54
SKV	24,000	-	153.60	153.60
ADG	107,400	-	107.00	107.00
NTC	190,000	-	37.70	37.70
UDJ	8,400	-	36.96	36.96

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