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The market gained well in the final week of Q2 thanks to investors' prospect on positive business results of listed enterprises. Vietnam GDP growth in Q2 was also better, supporting the faith and the stock market to gain.

VN-Index only corrected on Tuesday with selling pressure since the final day of Q2 was coming close. For the remaining days, the index gained well. At the end, VN-Index closed at 776.47 points (+0.97%), matched volume was 197.2 million shares (+3.3%) for 3,454 billion (-9.4%).

Last week, leading the gain on HOSE was the return of VNM (+3%), GAS (+2.8%) and banking MBB (+3.7%), BID (+2.5%), CTG (+1.2%), VCB (+1%). Meanwhile, STB (-2.8%) saw different situation, although it successfully held shareholder meeting after many delaying times and it has finally found a new leader board for this bank, however, STB's upcoming road is still very tough. Steel was quite positive last week like HPG (+3.9%), TLH (+3.1%), POM (+1.6%), especially HPG which was bought strongly by foreign investors. Chemical codes under Vinachem caused attention with limit gains like LIX (+16.1%), CSV (+10.4%), DCM (+3.3%). On the contrary, insurance was negative with BVH (-1%), PGI (-2.6%) and caused trouble on VN-Index's gain.

The situation on HNX was similar as HNX-Index closed the week at 99.14 points (+0.89%), matched volume was 42.6 million shares (-26.5%) for 689 billion (0.0%).

HNX was still supported by leading groups like construction and building materials GMX (+15.4%), CCM (+15.3%), TXM (+14%), VCG (+3.9%), VC9 (+21.6%). Besides, many securities codes gained VDS (+10%), SHS (+6.7%), BVS (+2.1%), MBS (+1%) along with insurance PTI (+7.5%) which helped the index up. Chemical codes on HNX were also positive with LAS (+6.1%), DGL (+5.1%) gaining. Meanwhile, the strongest burden of HNX-Index came from banking NVB (-24.2%) and textile MPT (-2.3%), TNG (-18.6%), G20 (-23.1%).

Foreign investors saw another net buying on HOSE of 781.8 billion (+92%), focusing on HPG (+170.61 billion), followed by KDC (+85.89 billion), VNM (+85.43 billion) while the net selling was on PVD (-32.29 billion), SKG (-25.58 billion), AAA (-24.85 billion). Foreign investors also turned to net buying of 9.3 billion on HNX, focusing on building materials BCC (+8.71 billion), VGC (+6.16 billion), VCG (+2.57 billion) and on the other side, the net selling was on NET (-12.57 billion), CEO (-3.57 billion), SHB (-1.89 billion).

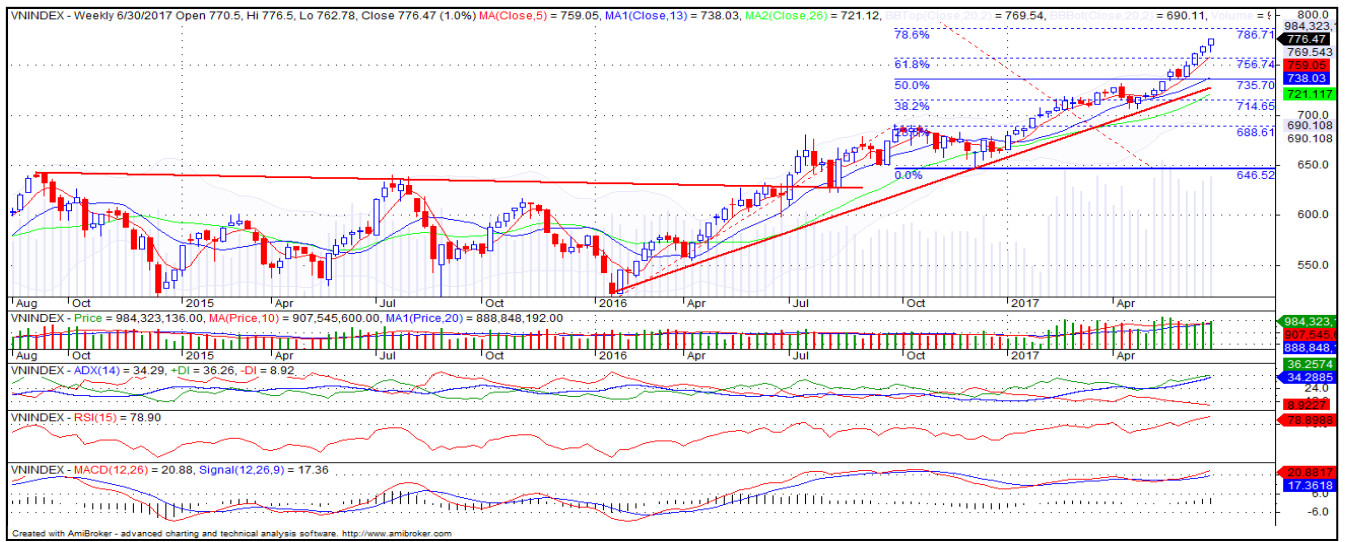
In technical term, VN-Index saw 4th recovering week in a row. The volume increased to above 10 and 20 session average, meaning that the cash flow is being positive. Not just that, the index stayed above MA5 and 20, and ADX increased to 32 with +DI being above and tending to raise the gap with -DI, showing that recovering trend is still there. Moreover, other technical indicators like MACD and RSI are increasing positively, showing that the index might move to challenge 786 points (Fib 78.6) next week. For HNX, HNX-Index saw similar situation. It gained again and stayed above MA5 and 20, showing that recovering trend is still there and the index might move to challenge 101.9 points (Fib 100). In general, recovering trend is still there and the market might move to challenge higher resistant levels. Therefore, investors might consider raising a small weight on leading codes with positive Q2/2017 business results prospect.

Market Brief

Domestic market

Date	Mon 26/06	Tue 27/06	Wed 28/06	Thu 29/06	Fri 30/06	Average
HOSE	772.52	767.51	769.04	771.75	776.47	771.46
Change+/-	3.51	-5.01	1.53	2.71	4.72	1.49
Change%	0.46	-0.65	0.20	0.35	0.61	0.19
Volume (mil shares)	212.47	217.43	183.66	198.17	174.26	197.20
Value (bil dong)	3,674.4	3,747.1	3,037.3	3,372.0	3,438.1	3,453.8
Foreign investment	76.5	112.4	101.7	101.4	389.8	156.4
HNX	98.73	98.02	98.35	98.80	99.14	98.61
Change+/-	0.46	-0.71	0.33	0.45	0.34	0.17
Change%	0.47	-0.72	0.34	0.46	0.34	0.18
Volume (mil shares)	52.30	41.25	37.65	40.35	41.29	42.57
Value (bil dong)	710.4	718.3	765.2	639.1	613.5	689.30
Foreign investment	2.7	8.7	-0.7	-6.9	5.5	1.86

VN-Index



HNX-Index



Top 10 codes of the week
HOSE
Top 10 gainers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
CCL	6.99	4815.64	39.80%
LEC	29.30	107.95	39.50%
HII	21.15	130.80	39.10%
OGC	2.12	47777.38	38.50%
STT	9.40	18.42	26.30%
VCF	221.00	10.28	22.80%
TSC	4.31	15506.20	19.70%
LIX	52.00	854.79	16.10%
HDC	15.20	3760.78	14.30%
VID	8.87	293.30	13.70%

Top 10 droppers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
QBS	8.95	3202.38	-22.20%
KAC	27.40	0.13	-19.40%
CTF	25.65	130.29	-19.10%
DHM	7.13	10006.27	-18.50%
PNC	15.85	0.72	-13.90%
TTF	7.65	2566.49	-13.10%
SSC	55.20	5.60	-10.97%
CMG	16.50	806.46	-10.33%
SII	21.05	0.07	-8.48%
TCM	29.08	5791.58	-8.31%

Top 10 in value

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
ROS	88.50	928.25	2.90%
FLC	7.17	635.23	-0.10%
HBC	51.30	618.20	-20.50%
HPG	32.00	592.94	3.90%
BHS	23.50	560.56	-5.60%
VNM	157.60	525.58	3.00%
PLX	69.00	399.98	-3.40%
BID	20.40	398.12	2.50%
SBT	35.05	313.05	-2.40%
NVL	68.00	267.94	-0.70%

HNX
Top 10 gainers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
UNI	5.20	247.11	33.30%
SJ1	20.00	6.10	27.40%
PVL	3.80	2164.03	26.70%
HHC	60.00	60.46	23.70%
SDE	2.20	0.74	22.20%
VC9	10.70	37.91	21.60%
VBC	96.80	68.21	20.80%
MKV	17.60	30.10	18.10%
API	35.00	51.03	16.70%
MSC	19.90	6.72	16.40%

Top 10 droppers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
VAT	5.70	1053.92	-26.00%
NVB	7.20	234.75	-24.20%
G20	2.00	1030.68	-23.10%
SGD	10.80	3.20	-20.00%
VXB	12.00	6.10	-18.90%
PDC	6.50	25.26	-17.70%
BXH	12.10	6.00	-17.10%
PCG	7.50	13.31	-16.70%
DPS	2.70	1387.82	-12.90%
POT	18.00	10.01	-11.33%

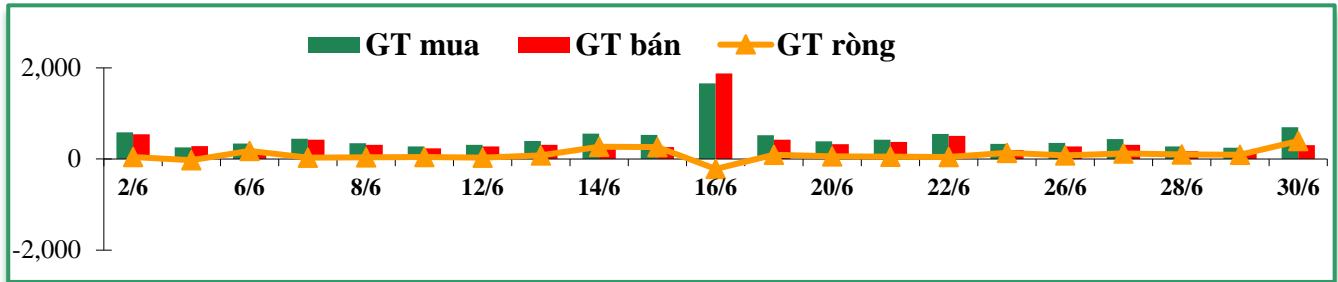
Top 10 in value

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
VCG	21.40	282.84	3.90%
SHB	7.60	278.14	1.30%
PIV	34.00	190.02	12.60%
CVT	46.60	133.45	2.90%
SHS	14.30	114.12	6.70%
ACB	25.90	112.38	0.80%
VC3	23.30	109.04	-2.10%
VCS	185.40	107.63	8.90%
PVI	33.70	80.08	0.60%
CEO	11.50	58.38	2.70%

Foreign investors' trade

Exchange	Buying Volume		Selling Volume		Buying value		Selling value		Buying-Selling Bil dong
	Mil shares	% +/-	Mil shares	% +/-	Bil dong	% +/-	Bil dong	% +/-	
HOSE	52.7	-8%	33.2	-33%	1,928.5	-11%	1,146.7	-35%	781.8
HNX	5.9	79%	5.3	-14%	80.8	63%	71.5	-6%	9.3
Total	58.6	-3%	38.5	-31%	2009.2	-9%	1218.2	-34%	791.1

Foreign investors' trade chart



HOSE

Top 10 net buying

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
HPG	32.00	170.61	3.90%
KDC	46.50	85.89	-0.10%
VNM	157.60	85.43	3.00%
GAS	58.30	57.03	2.80%
VCB	38.50	51.01	1.00%
SSI	27.65	50.46	1.30%
DPM	23.50	37.13	2.40%
PLX	69.00	36.97	-3.40%
NLG	28.50	34.00	-3.10%
HSG	32.40	31.18	0.20%

Top 10 net selling

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
PVD	13.85	32.29	5.70%
SKG	51.80	25.58	3.60%
AAA	34.55	24.85	-1.60%
VJC	126.30	22.07	0.20%
NVL	68.00	14.32	-0.70%
LIX	52.00	11.16	16.10%
HT1	22.60	8.55	-1.70%
STB	13.80	8.45	-2.80%
BMP	99.00	7.70	-2.90%
DQC	50.50	6.71	7.40%

HNX

Top 10 net buying

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
BCC	15.10	8.71	2.70%
VGC	19.50	6.16	1.00%
VCG	21.40	2.57	3.90%
API	35.00	1.93	16.70%
TEG	8.30	1.88	-3.50%
BVS	19.70	1.35	2.10%
IDV	48.40	1.30	-1.00%
VND	21.60	1.29	-0.50%
TTT	62.00	0.80	-10.10%
VIX	7.10	0.76	0.00%

Top 10 net selling

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
NET	33.50	12.57	16.30%
CEO	11.50	3.57	2.70%
SHB	7.60	1.89	1.30%
NTP	67.00	1.64	2.30%
IVS	10.90	1.19	0.90%
DNP	31.00	1.17	0.00%
S55	30.70	1.17	4.80%
TNG	11.80	0.97	-18.60%
VNT	33.00	0.95	6.50%
SDT	8.90	0.44	0.00%

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