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The market has gone through ETFs' reviews but selling pressure was still there last week. The peak of such pressure was in the first 2 sessions as both indexes dropped strongly, in which VN-Index lost 1,000 point benchmark so the cash flow was more cautious. However, the positivity of the market was that foreign investors saw net buying sessions again on both exchanges. For the week, their net selling was only about 484 billion, over 69% lower than last week.

Ending the week, VN-Index closed at 983.17 points (-3.28%) with average matched volume of 138.0 million shares (+1.7%) for 3530 billion (-11.1%).

Correcting pressure was still strong on pillar codes, in which, banking TCB (-9.9%), BID (-4.9%), CTG (-4.3%) and real estate VRE (-11.2%), VHM (-2.0%), VIC (-0.5%) still led the market's drop. Besides, food codes SAB (-3.7%), MSN (-4.7%), VNM (-0.9%) and construction ROS (-26.4%), REE (-5.4%), CTD (-3.6%) were similar. Petro codes also corrected strongly although oil price has increased strongly before OPEC meeting in Austria which will come to an agreement on raising the production to compensate with the shortage while oil demand is increasing.

It was similar on HNX, the index lowered the distance with the old peak of last correction. Ending the week, HNX-Index closed at 111.98 points (-3.38%) and average matched volume was 37.7 million shares (+7.2%) for 561 billion (-7.1%).

Pillar codes still led the index's drop. Banking ACB (-4.5%), SHB (-4.4%) and building material VCS (-13.8%), VGC (-0.7%), VHL (-3.8%) corrected the most. Besides, construction VCG (-2.0%), TV3 (-16.4%), L14 (-14.1%), real estate CEO (-7.9%), API (-18.4%), NDN (-7.6%) and food HHC (-39.8%), HAT (-4.5%), HKB (-5.0%) were also negative last week.

For foreign investors' trade, on HOSE, their net selling was still there but the value dropped strongly to only 399 billion (-72.6%), focusing on VIC (-242.7 billion), HPG (-170.9 billion), VHM (-126.8 billion) meanwhile VCB (+156.3 billion), SSI (+55.5 billion), VNM (+44.5 billion) were bought the most. On HNX, their net selling also dropped to about 84.6 billion (-32.1%), in which VGC (-154.1 billion), PLC (-4.4 billion), CIA (-4.2 billion) were sold the most while PVS (+60.0 billion), DL1 (+11.4 billion), VCG (+11.1 billion) led the net buying side.

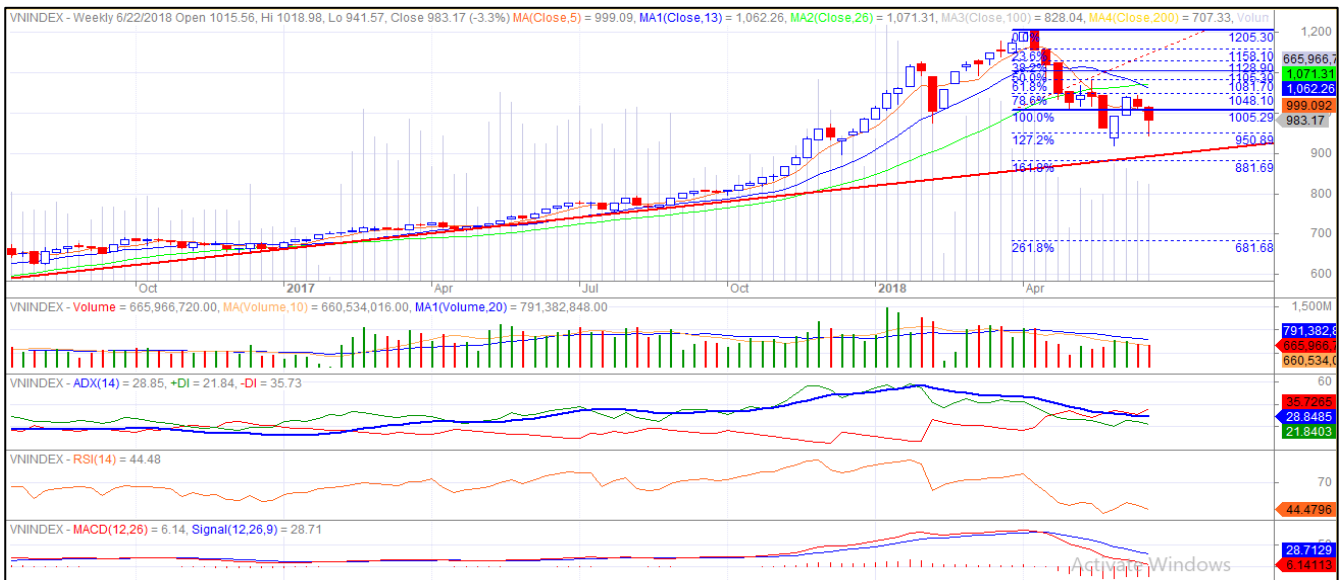
In technical term, VN-Index saw another dropping week. The volume stayed below 10 and 20 session average, meaning that the cash flow is being cautious. Not just that, the index still stayed below MA20 and ADX increased to 27 with -DI being above +DI, showing that the index's short-term correcting trend is still there. However, the index recovered again at the end of the week and closed above MA5, and RSI showed signs of recovering to 42, showing that correcting pressure is dropping, and the index might see a technical recovery next week. Resistant level might be sentimental level of 1,000 points. For HNX, HNX-Index was similar as it saw another dropping week and stayed below MA20, showing that short-term correcting trend might still be there. However, correcting pressure is dropping as the index gained again at the end of the week with increasing volume, showing that the index might see a technical recovery next week, and resistant level might be 114.9 points (MA20). In general, the market's main trend might still be short and middle-term correcting. However, the market might still see technical recovery next week. Therefore, investors that can take high risk can utilize it for short-term surfing.

Market Brief

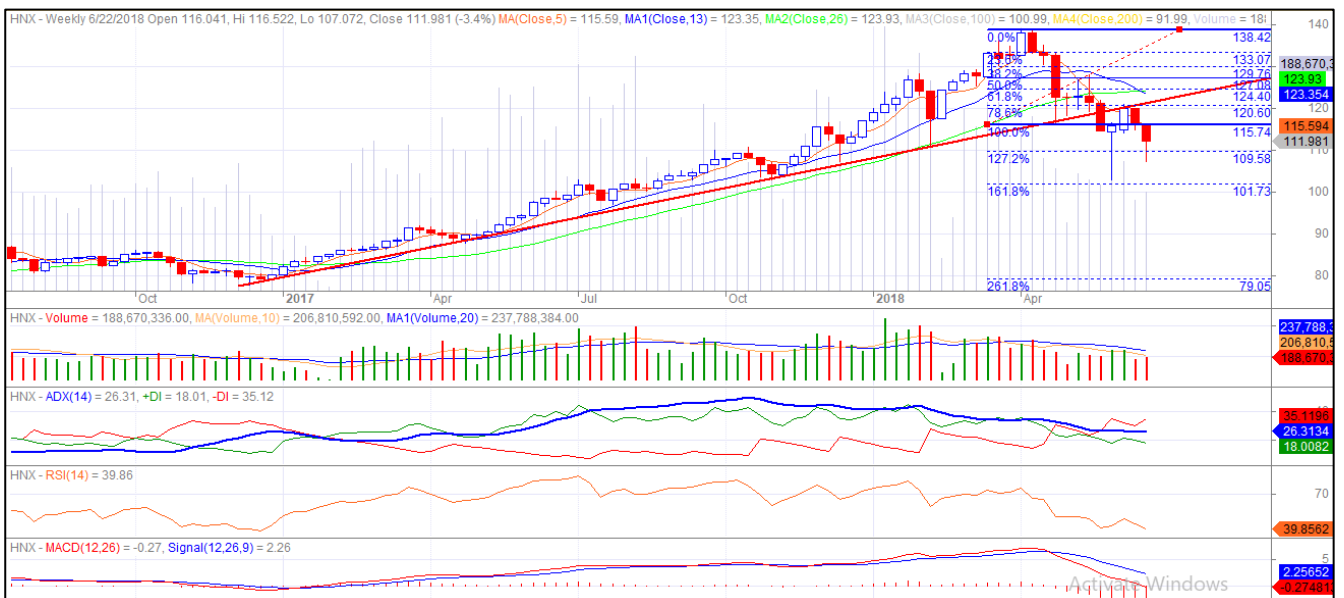
Domestic market

Date	Mon 18/06	Tue 19/06	Wed 20/06	Thu 21/06	Fri 22/06	Average
HOSE	987.34	962.16	980.95	969.40	983.17	976.60
Change+/-	-29.17	-25.18	18.79	-11.55	13.77	-6.67
Change%	-2.87	-2.55	1.95	-1.18	1.42	-0.67
Volume (mil shares)	145.59	169.95	94.52	135.23	144.87	138.03
Value (bil dong)	3,700.9	5,556.5	3,171.6	2,429.3	2,790.3	3,529.7
Foreign investment	-435.0	-90.7	-139.5	70.0	196.2	-79.8
HNX	113.05	110.58	112.11	110.16	111.98	111.57
Change+/-	-2.85	-2.47	1.53	-1.94	1.82	-0.78
Change%	-2.46	-2.18	1.38	-1.73	1.65	-0.67
Volume (mil shares)	37.51	59.53	32.35	26.28	33.01	37.73
Value (bil dong)	584.6	911.2	475.0	355.5	478.0	560.86
Foreign investment	-18.4	11.7	-3.6	-34.2	-40.1	-16.93

VN-Index



HNX-Index



Top 10 codes of the week
HOSE
Top 10 gainers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
RIC	7.6	8.4	24.5%
SVT	5.7	0.1	20.6%
SJF	21.6	4,337.2	19.2%
DTT	15.7	0.1	18.2%
DTA	7.0	8.4	15.9%
ST8	17.7	38.6	15.6%
CIG	2.8	1,272.3	13.2%
PNC	15.5	256.1	12.4%
TLD	13.6	2,724.2	12.1%
SJD	25.8	1,561.9	9.6%

Top 10 droppers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
SKG	20.6	615.6	-28.5%
STT	6.4	0.2	-27.7%
DAT	14.0	0.6	-27.7%
ROS	43.3	5,747.0	-26.4%
TMT	7.2	233.5	-17.2%
AGF	3.7	23.4	-16.8%
TYA	11.3	155.9	-16.6%
THG	32.0	76.1	-15.3%
LDG	14.7	3,549.9	-15.2%
HOT	37.8	3.3	-14.5%

Top 10 in value

Ticker	Closing rate('000)	Value (bil dong)	Change (%)
HPG	41.0	1,498.3	-4.4%
NVL	50.5	1,494.1	-4.8%
VCB	58.7	847.0	-0.3%
SSI	31.6	796.4	-5.5%
VIC	122.8	794.5	-0.5%
DXG	29.9	768.8	-7.8%
TCB	95.0	762.4	-9.9%
VNM	178.0	743.8	-0.9%
MBB	27.9	721.4	-5.0%
VPB	32.9	595.7	7.7%

HNX
Top 10 gainers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
LBE	18.2	0.4	31.0%
CTT	9.3	25.0	26.7%
DPC	18.0	3.2	19.6%
MKV	14.1	0.9	18.6%
DNP	24.4	3,127.4	18.0%
SGH	75.0	0.8	16.5%
INC	7.1	11.5	15.8%
MBG	2.9	738.7	15.4%
VGP	21.4	0.3	12.3%
PVV	1.1	325.0	10.9%

Top 10 droppers

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
HHC	47.5	1,560.8	-39.8%
DIH	10.3	12.7	-32.8%
KDM	3.4	551.3	-30.4%
SSM	10.3	0.3	-29.2%
NGC	9.0	1.5	-19.1%
X20	12.9	3.3	-18.7%
MNC	3.7	39.7	-18.6%
API	15.8	623.8	-18.4%
HKT	2.3	1,340.9	-18.3%
NFC	7.9	0.2	-17.6%

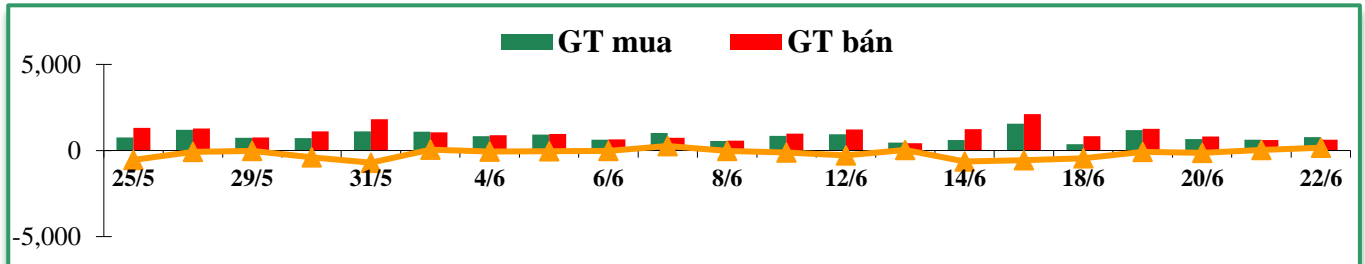
Top 10 in value

Ticker	Closing rate('000)	Value (bil dong)	Change (%)
ACB	39.4	900.8	-4.5%
VGC	23.7	365.4	-0.7%
PVS	17.3	356.9	3.4%
SHB	8.7	273.8	-4.4%
CIA	34.2	115.0	-13.9%
SHS	14.5	113.5	-6.3%
CEO	13.7	99.8	-7.9%
VCS	85.0	93.2	-13.8%
HHC	47.5	89.4	-39.8%
DNP	24.4	71.3	18.0%

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	66.6	-16%	75.2	-44%	3,493.1	-20%	3,892.1	-33%	-399.0
HNX	9.6	262%	11.3	15%	141.6	258%	226.2	38%	-84.6
Total	76.2	-7%	86.5	-40%	3634.7	-18%	4118.3	-31%	-483.6

Foreign investors' trade chart



HOSE

Top 10 net buying

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
VCB	58.7	156.3	-0.3%
SSI	31.6	55.5	-5.5%
VNM	178.0	44.5	-0.9%
GAS	90.7	43.4	-5.1%
STB	12.0	35.4	-3.1%
GEX	33.0	25.4	0.7%
CTD	155.0	18.4	-3.6%
VJC	174.9	16.4	1.5%
BVH	85.0	16.1	-0.3%
VCI	85.8	11.9	-8.7%

Top 10 net selling

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
VIC	122.8	(242.7)	-0.5%
HPG	41.0	(170.9)	-4.4%
VHM	114.2	(126.8)	-2.0%
VRE	40.0	(53.4)	-11.2%
DXG	29.9	(46.3)	-7.8%
BID	27.5	(37.1)	-4.9%
NVL	50.5	(33.8)	-4.8%
CII	26.6	(30.2)	-2.0%
PVD	13.2	(29.5)	-5.6%
HDB	37.4	(24.7)	-4.2%

HNX

Top 10 net buying

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
PVS	17.3	60.0	3.4%
DL1	37.4	11.4	1.1%
VCG	16.8	11.1	-2.0%
QNC	4.3	4.1	-8.5%
CEO	13.7	3.0	-7.9%
NRC	45.0	2.1	-4.7%
PCG	20.5	1.2	3.2%
SHB	8.7	1.2	-4.4%
KKC	12.0	0.3	-4.0%
BVS	16.7	0.2	-0.9%

Top 10 net selling

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
VGC	23.7	(154.1)	-0.7%
PLC	16.1	(4.4)	-3.0%
CIA	34.2	(4.2)	-13.9%
DBC	20.5	(4.1)	-3.3%
IVS	11.9	(2.4)	6.8%
LAS	11.7	(1.5)	-0.7%
L14	38.5	(1.0)	-14.1%
TTZ	8.3	(0.8)	8.6%
PGS	32.0	(0.7)	-0.7%
VCS	85.0	(0.5)	-13.8%

Disclaimer

This information has been compiled from sources we believe to be reliable, but we do not hold ourselves responsible for its completeness or accuracy. All opinions and estimates included in this report constitute our judgment as of this date and are subject to change without notice. The report is for reference only and investors must be responsible for their own decisions.

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