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Following the negativity from previous week, the market this week was still on dropping trend, completely different from the expectation on a recovery before the funds close on NAV. Most pillar groups on two exchanges corrected, the liquidity also dropped and foreign investors still basically saw net selling. In which, on HOSE, foreign investors net buying was strong of over 2 trillion last week but it mainly because of the agreement trade of over 2.3 trillion dong on YEG. Excluding this trade, their main status on HOSE was still net selling.

Ending the week, VN-Index closed at 960.78 points (-2.28%). Average matched volume dropped remarkably to only 120.0 million shares (-13.1%) for 2732 billion (-22.6%).

Last week, most pillar groups dropped. In which, real estate VIC (-12.2%), VHM (-1.5%), VRE (-2.9%) and banking VPB (-13.4%), CTG (-6.5%), BID (-5.4%) led the dropping side, followed by food VNM (-4.5%), BHN (-14.1%), MSN (-2.4%) and transportation VJC (-19.8%), SKG (-3.9%), MHC (-18.3%) which also placed pressure on the index. Besides, it was also negative on petro PLX (-8.0%), GAS (-2.4%), PGD (-5.8%) despite high oil price.

For HNX, the index dropped in all 4 last sessions of the week. HNX-Index officially closed at 106.17 points (-5.19%) with average volume of 30.3 million shares for 458 billion (-18.3%).

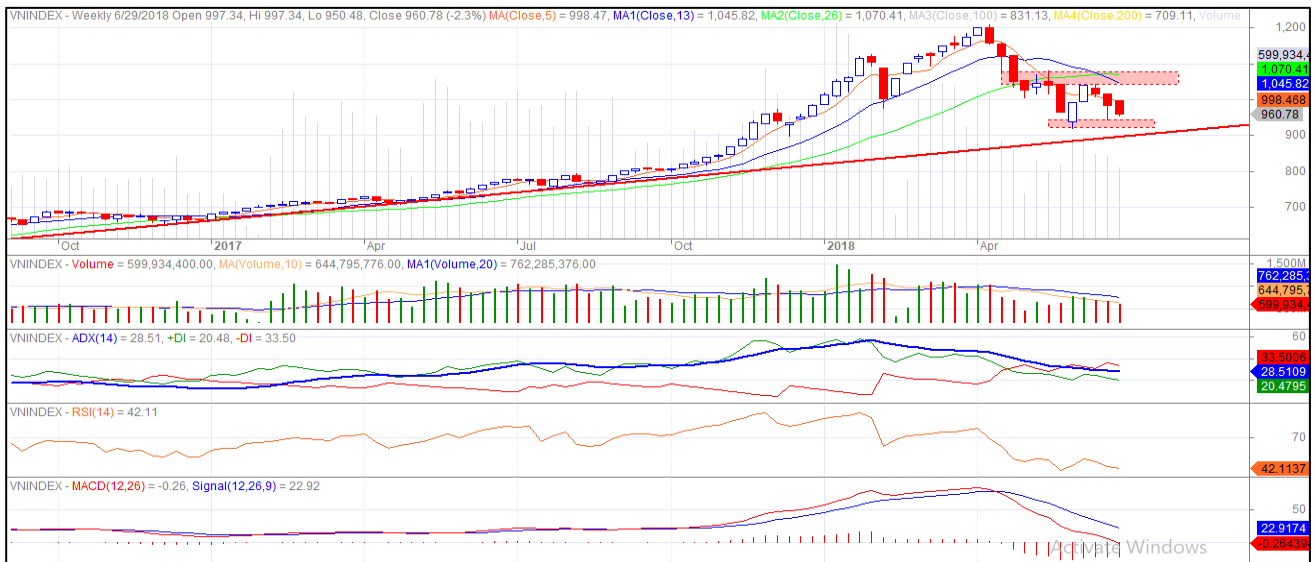
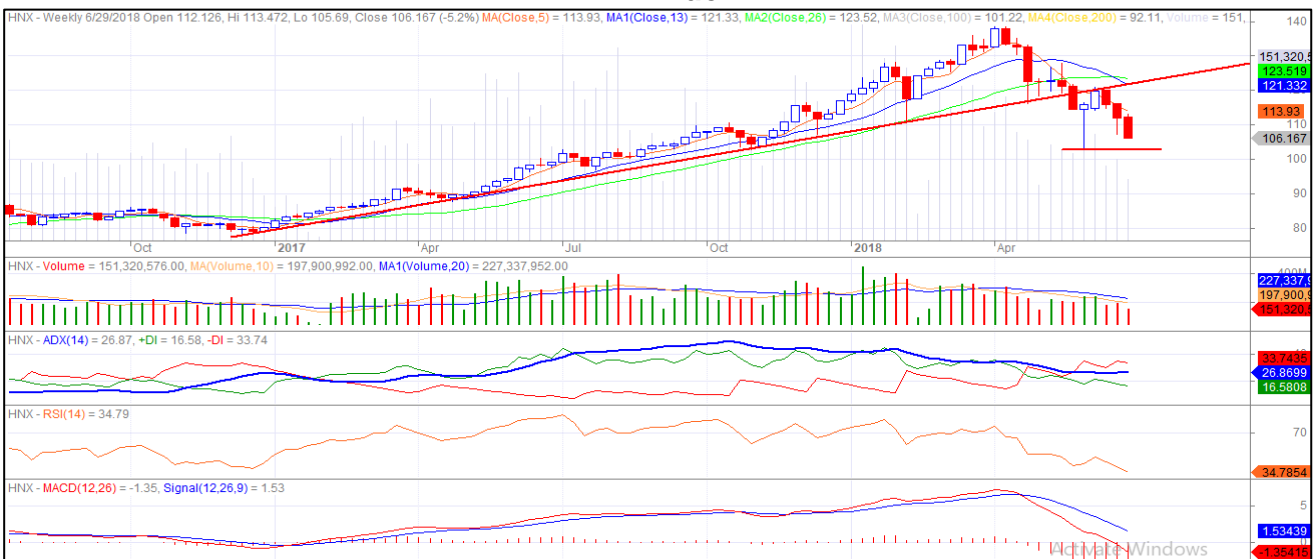
Last week, insurance gained positive PTI (+20.9%), VNR (+10.7%) but it wasn't enough to help HNX-Index changing the status. On the other side, most pillar groups like banking ACB (-10.0%), NVB (-3.7%), SHB (-5.9%) and building material VCS (-8.0%), VGC (-13.2%) dropped. Besides, plastic NTP (-6.9%), TPP (-19.0%), DNP (-1.2%) and seaport PHP (-8.8%), DXP (-0.7%) also dropped and placed strong pressure on the index.

About foreign investors, on HOSE, with the contribution of YEG, they turned to a net buying of 2026.3 billion, focusing on 3 main codes YEG (+2414.5 billion), DXG (+89.1 billion), KBC (+58.5 billion) while VIC (-308.1 billion), HNG (-88.7 billion), MSN (-66.8 billion) led the net selling side. Meanwhile on HNX, they saw another net selling of 13.1 billion (-84.5%), focusing on VGC (-48.8 billion), VNT (-5.0 billion), PLC (-2.9 billion), on the other side, PVS (+24.4 billion), DL1 (+11.5 billion), SHB (+3.8 billion) were bought the most.

In technical term, VN-Index saw the 3<sup>rd</sup> dropping week in a row. The volume stayed below 10 and 20 session average, meaning that the cash flow is quite cautious. Not just that, it stayed below MA20 and ADX increased to 31 with -DI being above +DI, showing that short-term correcting trend is still there. Moreover, other technical indicators also showed negative signs, as MACD stayed below Signal line, showing selling sign. Closest support level of the index might be 945-950 points (Fib 127.2). In case this level is broken, sentimental level of 900 points might be the next support level. For HNX, HNX-Index saw similar situation. It saw the 3<sup>rd</sup> dropping week and stayed below MA20, showing that short-term correcting trend might still be there. Closest support level might be 100-101 points (Fib 161.8). In general, the main trend might still be short and middle-term correcting. Therefore, investors should keep a low share weight and cautiously observe the market at the moment.

**Market Brief**
**Domestic market**

Date	Mon 25/06	Tue 26/06	Wed 27/06	Thu 28/06	Fri 29/06	Average
<b>HOSE</b>	<b>990.52</b>	<b>983.02</b>	<b>968.91</b>	<b>957.35</b>	<b>960.78</b>	<b>972.12</b>
Change+/-	7.35	-7.50	-14.11	-11.56	3.43	-4.48
Change%	0.75	-0.76	-1.44	-1.19	0.36	1.18
Volume (mil shares)	118.18	114.88	126.51	130.32	110.04	119.99
Value (bil dong)	2,739.1	2,137.6	2,649.7	3,178.3	2,957.0	2,732.3
Foreign investment	68.8	5.0	2,220.8	17.4	-285.6	405.3
<b>HNX</b>	<b>111.99</b>	<b>110.92</b>	<b>109.66</b>	<b>107.06</b>	<b>106.17</b>	<b>109.16</b>
Change+/-	0.01	-1.07	-1.26	-2.60	-0.89	-1.16
Change%	0.01	-0.96	-1.13	-2.38	-0.83	-1.06
Volume (mil shares)	28.75	25.37	34.06	35.03	28.12	30.26
Value (bil dong)	410.7	366.3	526.2	572.2	416.9	458.45
Foreign investment	-12.8	-11.7	-5.8	14.5	2.8	-2.62

**VN-Index**

**HNX-Index**


**Top 10 codes of the week**
**HOSE**
**Top 10 gainers**

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
DAT	19.4	0.6	33.7%
HCD	15.2	6,732.4	33.4%
CLW	18.3	0.1	20.2%
TNI	7.8	3,921.2	15.5%
TLD	15.7	3,700.0	14.8%
SJF	24.8	3,075.7	14.2%
NVT	5.1	568.8	13.8%
TDW	22.4	0.1	13.2%
SVT	6.4	0.3	13.1%
DTT	17.7	0.1	12.9%

**Top 10 droppers**

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
PTB	56.0	502.4	-38.9%
VFG	36.3	2.1	-26.3%
VJC	141.8	3,323.4	-19.8%
LDG	12.1	8,238.0	-18.8%
PNJ	87.0	3,634.2	-18.3%
MHC	4.9	383.6	-18.3%
MCG	2.8	25.7	-18.3%
HSL	20.6	927.4	-17.3%
CLG	2.9	23.9	-16.2%
BHN	91.5	6.3	-14.1%

**Top 10 in value**

Ticker	Closing rate('000)	Value (bil dong)	Change (%)
YEG	319.0	2,419.2	6.9%
NVL	51.0	1,264.4	1.0%
HPG	38.4	816.4	-6.3%
VIC	107.5	756.9	-12.2%
VPB	28.7	728.8	-13.4%
VNM	170.0	660.4	-4.5%
VCB	58.0	582.2	-1.2%
VJC	141.8	557.9	-19.8%
MWG	114.0	540.1	-2.4%
MBB	26.2	524.0	-6.2%

**HNX**
**Top 10 gainers**

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
AAV	16.7	2,013.3	35.6%
VE8	7.2	1.1	28.2%
PTI	24.2	67.3	20.9%
GLT	77.5	1.0	20.8%
SDP	2.2	16.4	20.6%
VC1	15.7	0.2	19.8%
VGP	25.8	7.3	19.6%
TV3	52.8	23.9	19.5%
ECI	13.3	0.4	19.0%
BPC	21.0	0.3	18.2%

**Top 10 droppers**

Ticker	Closing rate ('000)	Volume ('000 shares)	Change (%)
PCG	16.3	906.4	-21.3%
SCL	2.5	2.8	-20.6%
TPP	9.5	3.1	-19.0%
L61	9.5	0.2	-19.0%
BDB	4.3	0.2	-18.1%
LCS	3.1	3.0	-16.9%
KSK	0.5	40.0	-16.7%
PCE	7.2	1.0	-15.9%
CET	2.9	20.8	-15.0%
SJE	22.7	238.2	-14.9%

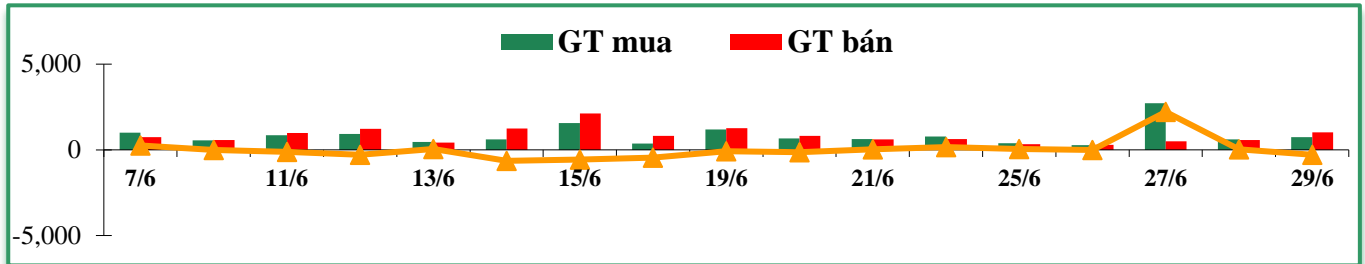
**Top 10 in value**

Ticker	Closing rate('000)	Value (bil dong)	Change (%)
ACB	35.6	862.0	-10.0%
PVS	17.3	363.3	0.1%
VGC	20.6	329.6	-13.2%
SHB	8.2	175.8	-5.9%
DBT	13.1	72.7	3.1%
CEO	13.2	71.5	-3.6%
SHS	13.5	70.4	-7.0%
VCS	78.3	65.7	-8.0%
DNP	24.0	60.3	-1.2%
NSH	10.4	59.8	1.0%

## 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	54.4	-18%	57.4	-24%	4,651.3	33%	2,624.9	-33%	2,026.3
HNX	3.4	-65%	3.4	-70%	59.0	-58%	72.1	-68%	-13.1
Total	57.8	-24%	60.8	-30%	4710.3	30%	2697.0	-35%	2013.3

## Foreign investors' trade chart



### HOSE

#### Top 10 net buying

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
YEG	319.0	2,414.5	6.9%
DXG	27.2	89.1	-9.2%
KBC	12.0	58.5	-2.0%
BMP	58.6	50.4	-0.7%
KDC	33.4	40.5	1.0%
VCB	58.0	36.8	-1.2%
CTD	152.4	36.3	-1.6%
FRT	81.0	21.5	2.5%
GAS	88.5	21.4	-2.4%
STB	11.6	18.0	-3.8%

#### Top 10 net selling

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
VIC	107.5	(308.1)	-12.2%
HNG	10.2	(88.7)	10.5%
MSN	79.0	(66.8)	-2.4%
CII	26.5	(36.4)	-0.3%
VHM	112.4	(36.1)	-1.5%
VRE	38.8	(30.9)	-2.9%
HDB	36.2	(21.0)	-3.2%
CTG	24.3	(16.9)	-6.5%
DIG	17.7	(16.2)	-1.0%
HSG	12.1	(14.5)	-4.4%

### HNX

#### Top 10 net buying

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
PVS	17.3	24.4	0.1%
DL1	35.4	11.5	-5.4%
SHB	8.2	3.8	-5.9%
CEO	13.2	3.6	-3.6%
SHS	13.5	1.7	-7.0%
PCG	16.3	0.7	-21.3%
VNR	25.5	0.6	10.7%
VCG	16.5	0.6	-1.8%
NSH	10.4	0.5	1.0%
VCS	78.3	0.4	-8.0%

#### Top 10 net selling

Ticker	Closing rate ('000)	Value (bil dong)	Change (%)
VGC	20.6	(48.8)	-13.2%
VNT	31.5	(5.0)	7.2%
PLC	16.2	(2.9)	1.0%
DNP	24.0	(1.5)	-1.2%
TV3	52.8	(1.0)	19.5%
PTI	24.2	(0.7)	20.9%
HUT	6.0	(0.6)	-6.4%
L14	35.7	(0.6)	-6.3%
TTT	53.7	(0.4)	7.4%
CSC	22.2	(0.4)	-5.0%

## 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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