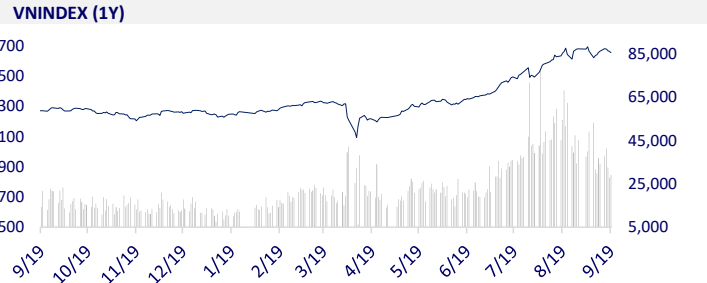
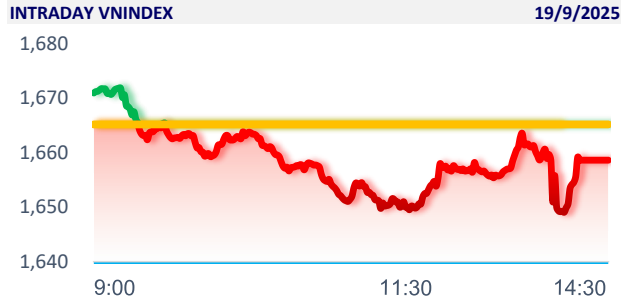
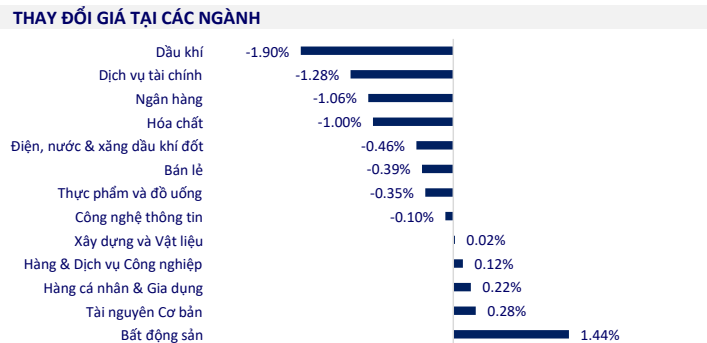


TTCK VIỆT NAM		1D	YTD
VN-INDEX	1,658.62	-0.39%	30.93%
HNX	276.24	-0.25%	21.46%
VN30	1,859.53	-0.12%	38.28%
UPCOM	111.01	-0.08%	16.78%
GT mua ròng NĐTNN (tỷ)	-2,985.90		
Tổng GTGD (tỷ)	31,145.00	1.60%	71.78%

VN-Index bắt đầu hồi phục hơn 17 điểm khi cổ phiếu VIC được kéo sau phiên ATC. Bất động sản và Tài nguyên là các nhóm có diễn biến tích cực nhất trong phiên hôm nay. Trái lại, nhóm Chứng khoán, Dầu khí và Ngân hàng lại diễn biến khá ảm đạm.



ETF & PHẢI SINH		1D	YTD
E1VFN30	32,990	0.27%	40.50%
FUEMAV30	22,720	0.40%	39.56%
FUESSV30	23,370	-0.89%	39.94%
FUESSV50	28,490	0.32%	41.74%
FUESSVFL	33,000	-0.60%	49.32%
FUEVFVND	40,350	-0.12%	20.38%
FUEVN100	24,880	-0.28%	38.84%
4111FA000	1,848.2	-0.10%	
4111FB000	1,847.9	-0.94%	
VN30F2512	1,845.1	0.30%	
4111G3000	1,828.0	0.08%	



THỊ TRƯỜNG THẾ GIỚI		1D	YTD
Nikkei 225	45,045.81	-0.57%	12.91%
Shanghai	3,820.09	-0.30%	13.97%
Hang Seng	26,545.10	0.00%	32.34%
Kospi	3,445.24	0.67%	43.58%
BSE Sensex	82,673.47	-0.41%	5.22%
STI (Singapore)	4,318.74	0.14%	14.02%
SET (Thái Lan)	1294.32	-0.21%	-7.56%
Dầu Brent (\$/thùng)	66.97	-0.70%	-10.77%
Vàng (\$/ounce)	3,657.45	0.36%	38.80%

Chứng khoán Châu Á Biến chủ yếu giảm điểm trong phiên hôm nay. Đáng chú ý là chỉ số Nikkei 225 kết phiên để mất gần 0.6% về mốc 45,045.81 điểm sau khi tiếp tục thiết lập mức đỉnh mới vào phiên sáng, trong bối cảnh Ngân hàng Trung ương Nhật Bản giữ nguyên lãi suất chính sách ở mức 0.5%.

KINH TẾ VĨ MÔ		1D (bps)	YTD (bps)
Lãi suất liên NH	3.92%	-28	-5
Lãi suất tiết kiệm 12T	4.60%	0	0
TPCP - 5 năm	3.07%	-10	59
TPCP - 10 năm	3.30%	-20	45
USD/VND	26,445	0.00%	3.50%
EUR/VND	31,860	-0.29%	16.85%
CNY/VND	3,769	0.01%	5.83%

Hôm nay, thị trường vàng trong nước tiếp tục hạ nhiệt khi giá nhẫn trơn và nữ trang đồng loạt giảm thêm 500,000 đồng/lượng, trong khi vàng miếng SJC tạm chững lại ở mốc 132 triệu đồng/lượng sau phiên điều chỉnh trước đó.

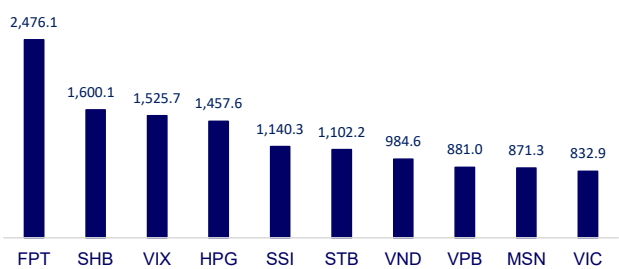
LỊCH SỰ KIỆN						
Mã	Ngày GDKHQ	Ngày ĐKCC	Ngày thực hiện	Loại	Tỉ lệ	Giá trị
HCC	22/09/2025	23/09/2025	22/10/2025	Tiền mặt		2,000
SZE	23/09/2025	24/09/2025	16/10/2025	Tiền mặt		800
TVS	23/09/2025	24/09/2025		Cổ phiếu	100:20	
SSI	25/09/2025	26/09/2025	15/10/2025	Tiền mặt		1,000
PNJ	26/09/2025	29/09/2025	23/10/2025	Tiền mặt		1,400
CTR	30/09/2025	01/10/2025	15/10/2025	Tiền mặt		2,150
PHP	30/09/2025	01/10/2025	20/10/2025	Tiền mặt		600
PVD	30/09/2025	01/10/2025	17/10/2025	Tiền mặt		500
SHP	01/10/2025	02/10/2025	14/10/2025	Tiền mặt		1,000
NTH	06/10/2025	07/10/2025	23/10/2025	Tiền mặt		1,500

TIN TỨC CHỌN LỌC

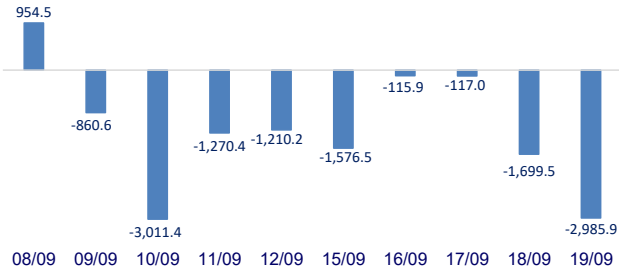
Giải ngân vốn đầu tư công đạt 100%, GDP có thể tăng trưởng thêm 2%;
Đại sứ Pháp nêu 3 yếu tố giúp Việt Nam trở thành trung tâm tài chính lớn ở Đông Nam Á;
Đề xuất Hà Nội và TP.HCM là đô thị loại đặc biệt, 4 thành phố là đô thị loại I;
NHTW Nhật Bản giữ nguyên lãi suất, lên kế hoạch bán dần khoản nắm giữ ETF và J-REIT;
Ngân hàng Trung ương Anh giữ nguyên lãi suất;
Nhà đầu tư Trung Quốc rời bỏ vàng để chuyển sang chứng khoán.

	Đóng cửa	1D	5D	KL mua	KL bán	Nội dung
VCB	63,000	-1.41%	-4.26%	11,343,075	11,192,533	TCB: TCBS đã phát hành thành công 231.15 triệu cổ phiếu, vốn điều lệ công ty theo đó sẽ tăng từ 20,802 tỷ đồng lên hơn 23,113 tỷ đồng, vốn chủ sở hữu lên hơn 41,000 tỷ đồng (chưa tính đến lợi nhuận để lại của quý 3). Sức hút của thương vụ IPO TCBS vượt ngoài dự kiến khi tổng lượng đăng ký mua của nhà đầu tư đạt hơn 575.16 triệu cổ phiếu , cao gấp 2.5 lần so với lượng chào bán. Trên cơ sở này TCBS đã công bố tỷ lệ phân bổ (Prorata) ở mức 40.188%
BID	39,800	-2.45%	-2.81%	12,075,006	9,709,240	
CTG	51,200	0.00%	1.59%	13,835,800	12,564,148	
TCB	38,400	-1.03%	-0.52%	21,614,793	26,856,759	
VPB	30,400	-1.30%	-3.80%	54,799,862	39,405,246	
MBB	26,650	-0.56%	0.19%	38,928,173	26,226,329	
HDB	30,200	-1.63%	-4.13%	23,539,654	22,388,817	
TPB	18,600	-1.33%	-4.62%	26,268,830	18,179,748	
STB	55,200	-3.16%	-0.36%	27,620,564	29,304,297	
VIB	20,300	-1.22%	-4.47%	18,239,949	15,002,034	
ACB	25,350	-0.78%	-3.61%	28,946,710	24,456,762	Giá dầu Brent thế giới giảm 0.7% ngày hôm nay khi các nhà đầu tư lo ngại về triển vọng kinh tế Mỹ.
SHB	17,750	-0.56%	1.14%	133,693,186	132,877,991	
SSB	19,600	-2.00%	-0.25%	11,529,405	11,716,148	
LPB	46,500	2.42%	5.44%	4,968,519	4,779,446	
GAS	62,500	-0.79%	0.00%	1,118,265	1,469,686	
PLX	35,350	-0.70%	-0.70%	3,516,556	3,257,506	
VIC	153,200	5.66%	11.18%	10,840,406	6,863,620	
VHM	101,700	-1.74%	-3.60%	14,825,689	10,721,161	
VRE	29,450	-2.48%	-4.23%	10,692,476	11,026,725	
VNM	62,000	-2.52%	-1.90%	8,410,086	9,253,367	VIC: Vingroup vừa ký biên bản ghi nhớ phát triển dự án năng lượng tái tạo tại Indonesia.
MSN	83,900	-0.12%	-2.44%	13,224,087	22,319,346	
SAB	46,000	-1.71%	-1.39%	2,152,093	2,229,395	
BCM	68,900	-0.43%	2.99%	431,191	717,685	
DGC	96,700	-2.13%	-0.82%	4,739,292	3,133,828	
VJC	137,200	-1.86%	-6.03%	2,626,615	3,102,140	
FPT	103,000	0.00%	1.38%	32,326,837	45,140,697	
MWG	78,600	0.13%	-0.51%	8,223,630	7,223,539	
GVR	28,600	-0.69%	-2.56%	2,334,348	2,891,092	
SSI	40,350	-1.10%	-3.70%	48,981,567	41,864,051	
HPG	29,250	0.34%	-2.50%	88,194,548	89,230,003	

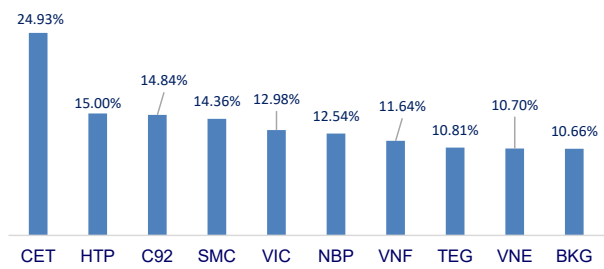
Top CP có tổng giá trị giao dịch cao nhất (tỷ đồng)



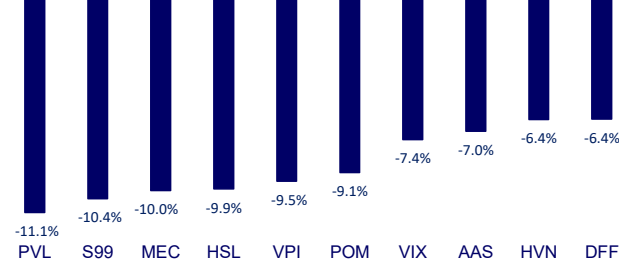
Dòng tiền NĐTNN 10 phiên gần nhất (tỷ đồng)



Top tăng 3 phiên có thanh khoản



Top giảm 3 phiên có thanh khoản



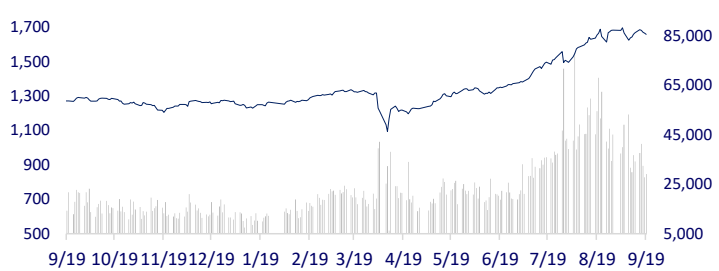
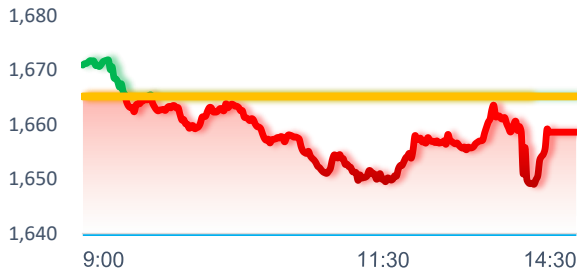
VIETNAM STOCK MARKET

		1D	YTD
VN-INDEX	1,658.62	-0.39%	30.93%
HNX	276.24	-0.25%	21.46%
VN30	1,859.53	-0.12%	38.28%
UPCOM	111.01	-0.08%	16.78%
Net Foreign buy (B)	-2,985.90		
Total trading value (B)	31,145.00	1.60%	71.78%

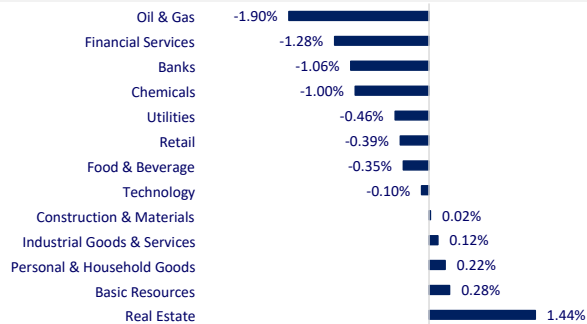
VN-Index unexpectedly rebounded by more than 17 points as VIC shares surged during the ATC session. Real Estate and Resources were the most positive sectors of the day, while Securities, Oil & Gas, and Banking stocks performed rather weakly.

INTRADAY VNINDEX

9/19/2025

VNINDEX (1Y)

ETF & DERIVATIVES

		1D	YTD
E1VFN30	32,990	0.27%	40.50%
FUEMAV30	22,720	0.40%	39.56%
FUESSV30	23,370	-0.89%	39.94%
FUESSV50	28,490	0.32%	41.74%
FUESSVFL	33,000	-0.60%	49.32%
FUEVFNVD	40,350	-0.12%	20.38%
FUEVN100	24,880	-0.28%	38.84%
4111FA000	1,848.20	-0.10%	
4111FB000	1,847.90	-0.94%	
VN30F2512	1,845.10	0.30%	
4111G3000	1,828.00	0.08%	

CHANGE IN PRICE BY SECTOR

GLOBAL MARKET

		1D	YTD
Nikkei 225	45,045.81	-0.57%	12.91%
Shanghai Component	3,820.09	-0.30%	13.97%
Hang Seng	26,545.10	0.00%	32.34%
Kospi	3,445.24	0.67%	43.58%
BSE Sensex	82,673.47	-0.41%	5.22%
STI (Singapore)	4,318.74	0.14%	14.02%
SET (Thailand)	1,294.32	-0.21%	-7.56%
Brent oil (\$/barrel)	66.97	-0.70%	-10.77%
Gold (\$/ounce)	3,657.45	0.36%	38.80%

Asian stock markets mostly declined in today's session. Notably, Japan's Nikkei 225 closed down nearly 0.6% at 45,045.81 points after hitting a fresh morning peak, as the Bank of Japan kept its policy rate unchanged at 0.5%.

VIETNAM ECONOMY

		1D (bps)	YTD (bps)
Vnibor	3.92%	-28	-5
Deposit interest 12M	4.60%	0	0
5 year-Gov. Bond	3.07%	-10	59
10 year-Gov. Bond	3.30%	-20	45
USD/VND	26,445	0.00%	3.50%
EUR/VND	31,860	-0.29%	16.85%
CNY/VND	3,769	0.01%	5.83%

Vietnam's domestic gold market continued to cool down. Plain rings and jewelry fell by another 500,000 VND/tael, while SJC gold bars held steady at 132 million VND/tael following the previous adjustment.

EVENT CALENDAR

Ticker	Ex-right Date	Last register Date	Exercise Date	Type	Rate	Value
HCC	22/09/2025	23/09/2025	22/10/2025	Cash		2,000
SZE	23/09/2025	24/09/2025	16/10/2025	Cash		800
TVS	23/09/2025	24/09/2025		Stock	100:20	
SSI	25/09/2025	26/09/2025	15/10/2025	Cash		1,000
PNJ	26/09/2025	29/09/2025	23/10/2025	Cash		1,400
CTR	30/09/2025	1/10/2025	15/10/2025	Cash		2,150
PHP	30/09/2025	1/10/2025	20/10/2025	Cash		600
PVD	30/09/2025	1/10/2025	17/10/2025	Cash		500
SHP	1/10/2025	2/10/2025	14/10/2025	Cash		1,000
NTH	6/10/2025	7/10/2025	23/10/2025	Cash		1,500

SELECTED NEWS

Public investment disbursement has reached 100%, which could help GDP grow by an additional 2%;

The French Ambassador highlighted three factors that could make Vietnam a major financial hub in Southeast Asia;

There is a proposal to designate Hanoi and Ho Chi Minh City as “special-class” urban areas, while four other cities would be classified as “first-class”;

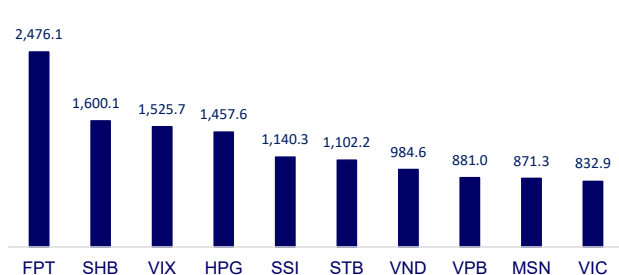
The Bank of Japan has kept interest rates unchanged and plans to gradually sell off its holdings of ETFs and J-REITs;

The Bank of England has also kept interest rates unchanged;

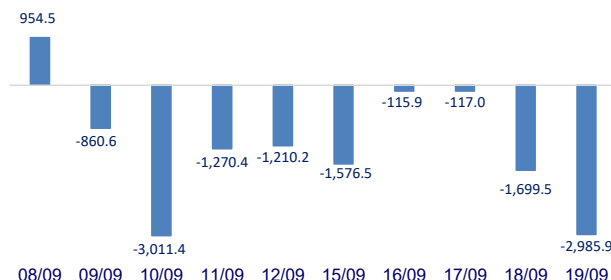
Chinese investors are moving away from gold and shifting into stocks.

	Close	1D	5D	Buying vol.	Selling vol.	Content
VCB	63,000	-1.41%	-4.26%	11,343,075	11,192,533	TCB: Techcom Securities (TCBS) has successfully issued 231.15 million shares, raising its charter capital from VND20,802 billion to over VND23,113 billion, and bringing total shareholders' equity to more than VND41,000 billion (excluding retained earnings from Q3). The IPO drew far more interest than expected, with total investor subscriptions exceeding 575.16 million shares — 2.5 times the offering. Based on this, TCBS announced an allocation ratio (pro-rata) of 40.188%.
BID	39,800	-2.45%	-2.81%	12,075,006	9,709,240	
CTG	51,200	0.00%	1.59%	13,835,800	12,564,148	
TCB	38,400	-1.03%	-0.52%	21,614,793	26,856,759	
VPB	30,400	-1.30%	-3.80%	54,799,862	39,405,246	
MBB	26,650	-0.56%	0.19%	38,928,173	26,226,329	
HDB	30,200	-1.63%	-4.13%	23,539,654	22,388,817	
TPB	18,600	-1.33%	-4.62%	26,268,830	18,179,748	
STB	55,200	-3.16%	-0.36%	27,620,564	29,304,297	
VIB	20,300	-1.22%	-4.47%	18,239,949	15,002,034	
ACB	25,350	-0.78%	-3.61%	28,946,710	24,456,762	Brent crude oil prices fell 0.7% today as investors grew concerned about the U.S. economic outlook.
SHB	17,750	-0.56%	1.14%	133,693,186	132,877,991	
SSB	19,600	-2.00%	-0.25%	11,529,405	11,716,148	VIC: Vingroup has signed a memorandum of understanding to develop a renewable energy project in Indonesia.
LPB	46,500	2.42%	5.44%	4,968,519	4,779,446	
GAS	62,500	-0.79%	0.00%	1,118,265	1,469,686	VIC: Vingroup has signed a memorandum of understanding to develop a renewable energy project in Indonesia.
PLX	35,350	-0.70%	-0.70%	3,516,556	3,257,506	
VIC	153,200	5.66%	11.18%	10,840,406	6,863,620	MSN: Subsidiary VCF will finalize the list of shareholders entitled to receive the 2024 cash dividend. The payout ratio is 480%, meaning shareholders will receive 48,000 VND/share, with payment scheduled for October 8, 2025.
VHM	101,700	-1.74%	-3.60%	14,825,689	10,721,161	
VRE	29,450	-2.48%	-4.23%	10,692,476	11,026,725	FPT: FPT has announced a strategic investment in Daythree Digital Berhad, a leading Malaysian firm in business process and systems management. The deal, made through FPT's Malaysian subsidiary, gives it a 10% stake, making FPT the company's first foreign investor.
VNM	62,000	-2.52%	-1.90%	8,410,086	9,253,367	
MSN	83,900	-0.12%	-2.44%	13,224,087	22,319,346	FPT: FPT has announced a strategic investment in Daythree Digital Berhad, a leading Malaysian firm in business process and systems management. The deal, made through FPT's Malaysian subsidiary, gives it a 10% stake, making FPT the company's first foreign investor.
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BCM	68,900	-0.43%	2.99%	431,191	717,685	FPT: FPT has announced a strategic investment in Daythree Digital Berhad, a leading Malaysian firm in business process and systems management. The deal, made through FPT's Malaysian subsidiary, gives it a 10% stake, making FPT the company's first foreign investor.
DGC	96,700	-2.13%	-0.82%	4,739,292	3,133,828	
VJC	137,200	-1.86%	-6.03%	2,626,615	3,102,140	FPT: FPT has announced a strategic investment in Daythree Digital Berhad, a leading Malaysian firm in business process and systems management. The deal, made through FPT's Malaysian subsidiary, gives it a 10% stake, making FPT the company's first foreign investor.
FPT	103,000	0.00%	1.38%	32,326,837	45,140,697	
MWG	78,600	0.13%	-0.51%	8,223,630	7,223,539	FPT: FPT has announced a strategic investment in Daythree Digital Berhad, a leading Malaysian firm in business process and systems management. The deal, made through FPT's Malaysian subsidiary, gives it a 10% stake, making FPT the company's first foreign investor.
GVR	28,600	-0.69%	-2.56%	2,334,348	2,891,092	
SSI	40,350	-1.10%	-3.70%	48,981,567	41,864,051	FPT: FPT has announced a strategic investment in Daythree Digital Berhad, a leading Malaysian firm in business process and systems management. The deal, made through FPT's Malaysian subsidiary, gives it a 10% stake, making FPT the company's first foreign investor.
HPG	29,250	0.34%	-2.50%	88,194,548	89,230,003	

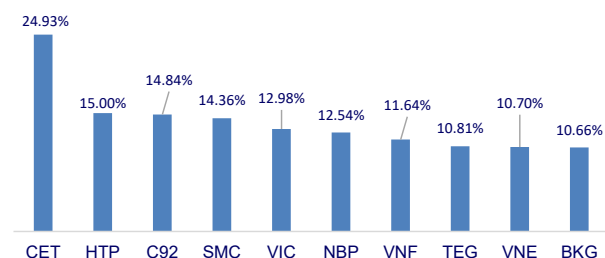
Top highest total traded value stocks (Billion VND)



Foreign net flow 10 nearest sessions (Billion VND)



Top increases in 3 sessions with liquidity



Top decreases in 3 sessions with liquidity

