

GLOBAL MARKET		1D	YTD
DJIA	46,121.28	-0.37%	8.41%
S&P500	6,637.98	-0.29%	12.86%
NASDAQ	22,497.86	-0.33%	16.50%
VIX	16.18	-2.76%	-6.74%
FTSE 100	9,250.43	0.29%	13.18%
DAX	23,666.81	0.23%	18.87%
CAC40	7,827.45	-0.57%	6.05%
Brent oil (\$/barrel)	69.29	1.99%	-7.67%
Gold (\$/ounce)	3,750.00	-0.40%	42.31%

U.S. stocks fell for the second straight session as investors await upcoming key labor market data. The decline was once again led by major artificial intelligence stocks such as Nvidia and Oracle, with Nvidia losing 1% and Oracle falling nearly 2%.

VIETNAM ECONOMY		1D (bps)	YTD (bps)
Vnibor	4.35%	35	38
Deposit interest 12M	4.60%	0	0
5 year-Gov. Bond	3.14%	2	66
10 year-Gov. Bond	3.48%	-13	63
USD/VND	26,445	-0.01%	3.50%
EUR/VND	31,987	0.11%	17.32%
CNY/VND	3,774	0.06%	6.00%

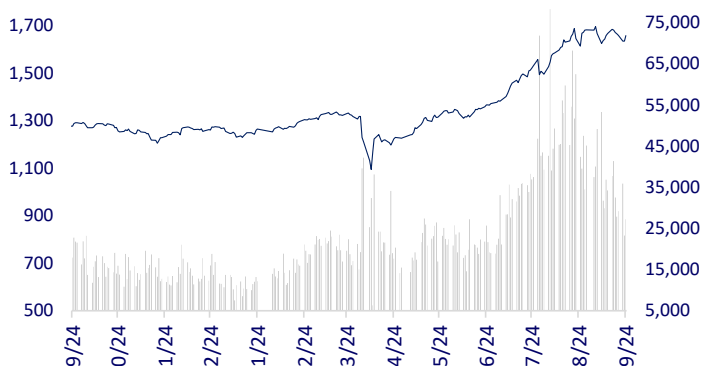
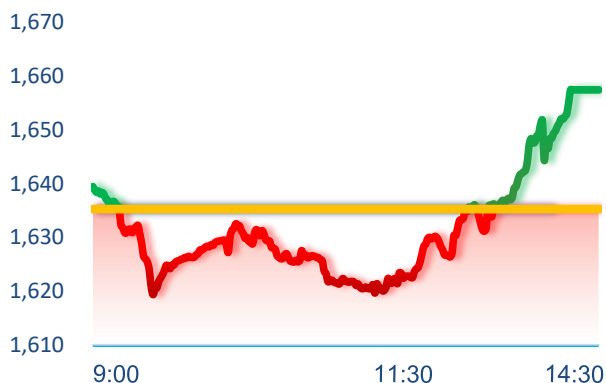
On the evening of September 26, 2025 (Friday), 46 foreign investment funds will vote on Vietnam's stock market upgrade. If more than 70% (at least 33 funds) agree, the market will officially be upgraded on October 8, 2025 (Vietnam time). According to speculation, the funds have already reached consensus, and there is nearly a 99.9% chance that Vietnam's stock market will be upgraded in October.

VIETNAM STOCK MARKET		1D	YTD
VN-INDEX	1,657.46	1.36%	30.84%
HNX	277.28	1.56%	21.92%
VN30	1,853.48	1.76%	37.83%
UPCOM	109.65	-0.34%	15.35%
Net Foreign buy (B)	-1,580.75		
Total trading value (B)	29,844.53	18.98%	64.61%

VN-Index had a booming session thanks to a sharp reversal from the banking sector. However, proprietary traders unexpectedly sold a net value of 223 billion VND on September 24, mainly in VPB (199 billion VND), VHC (23 billion VND), and VIC (23 billion VND). In contrast, they net bought Diamond ETF (22 billion VND), MSN (16 billion VND), and VRE (15 billion VND).

VNINDEX - INTRADAY

VNINDEX (1Y)



The Prime Minister has issued a directive to promote exports and expand overseas markets;

The Ministry of Construction provided details on a "mega-project" — a 187 km, USD 7 billion railway connecting Vietnam with China;

Authorities also identified new drivers for achieving GDP growth of 8.3%–8.5%;

In Washington, officials revealed that a deal with ASEAN countries is expected to be signed soon;

Meanwhile, China's housing prices have been falling for four consecutive years, with massive inventories requiring USD 700 billion to absorb;

The Kremlin responded after former U.S. President Donald Trump referred to Russia as a "paper tiger."

EVENT CALENDAR

Ticker	Ex-right Date	Last register Date	Exercise Date	Type	Rate	Value
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
VHC	29/09/2025	30/09/2025	15/10/2025	Cash		2,000
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
VTP	3/10/2025	6/10/2025	22/10/2025	Cash		1,081
NTH	6/10/2025	7/10/2025	23/10/2025	Cash		1,500
ASM	7/10/2025	8/10/2025		Stock	100:10	