

GLOBAL MARKET		1D	YTD
DJIA	46,247.29	0.65%	8.70%
S&P500	6,643.70	0.59%	12.96%
NASDAQ	22,484.07	0.44%	16.43%
VIX	15.29	-8.66%	-11.87%
FTSE 100	9,284.83	0.77%	13.60%
DAX	23,739.47	0.87%	19.24%
CAC40	7,870.68	0.97%	6.64%
Brent oil (\$/barrel)	68.72	-0.56%	-8.43%
Gold (\$/ounce)	3,774.00	0.55%	43.22%

U.S. stocks all moved higher in the final trading session of the week on September 26. The Dow Jones, S&P 500, and Nasdaq Composite rose 0.65%, 0.59%, and 0.44%, respectively. Despite snapping a three-day losing streak, all three major indexes still closed the week in negative territory. The Nasdaq Composite and S&P 500 slipped 0.7% and 0.3%, marking their first weekly decline after three straight weeks of gains. The Dow Jones also lost 0.2% for the week.

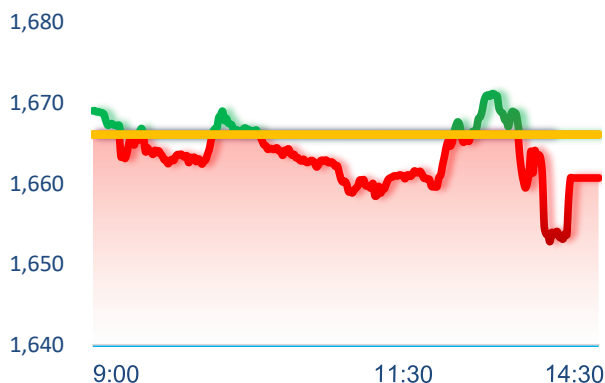
VIETNAM ECONOMY		1D (bps)	YTD (bps)
Vnibor	4.36%	-26	39
Deposit interest 12M	4.60%	0	0
5 year-Gov. Bond	3.16%	-1	68
10 year-Gov. Bond	3.48%	-2	64
USD/VND	26,453	0.01%	3.53%
EUR/VND	31,600	-0.73%	15.90%
CNY/VND	3,760	-0.11%	5.59%

In the U.S., the core Personal Consumption Expenditures (PCE) price index for August rose 2.9% year-on-year, in line with economists' forecasts from a Dow Jones survey. The overall PCE index increased 2.7% compared to a year earlier and 0.3% from the prior month, also matching market expectations. Based on this data, investors continue to anticipate that the Federal Reserve will deliver two more 0.25 percentage point rate cuts in its remaining meetings this year.

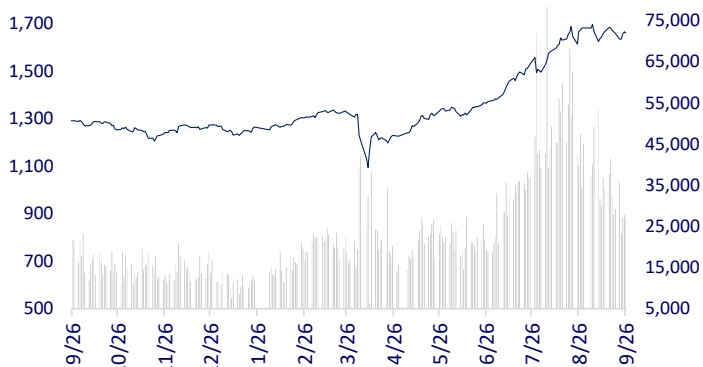
VIETNAM STOCK MARKET		1D	YTD
VN-INDEX	1,660.70	-0.32%	31.10%
HNX	276.06	-0.57%	21.38%
VN30	1,852.65	-0.32%	37.77%
UPCOM	110.63	0.13%	16.38%
Net Foreign buy (B)	-2,162.06		
Total trading value (B)	29,919.70	-1.40%	65.02%

VN-Index swung sharply during the afternoon session on September 26, pressured mainly by banking stocks. Proprietary trading desks continued to net-sell VND 408 billion, with heavy selling in VPB (VND 302 billion), FPT (VND 32 billion), and HAG (VND 28 billion). In contrast, they net-bought ACB (VND 44 billion) and DC's VN30 ETF (VND 21 billion).

## VNINDEX - INTRADAY



## VNINDEX (1Y)



The Government has issued a new decree to tighten the management of public investment capital;  
A new proposal has been put forward to allow postponement of exit for businesses with outstanding tax debts;  
Criteria are being defined for key projects under the "Public-Private Co-Nation Building" initiative;  
ASEAN will discuss U.S. tariffs in October;  
Former President Trump is considering imposing tariffs on electronic devices containing chips;  
China has renounced its status as a developing country at the WTO.

## 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	