

GLOBAL MARKET		1D	YTD
DJIA	45,752.26	-0.84%	7.54%
S&P500	6,538.97	-1.55%	11.18%
NASDAQ	22,078.05	-2.15%	14.33%
VIX	26.42	11.67%	52.28%
FTSE 100	9,527.65	0.21%	16.57%
DAX	23,278.85	0.50%	16.93%
CAC40	7,981.07	0.34%	8.13%
Brent oil (\$/barrel)	62.72	-2.17%	-16.43%
Gold (\$/ounce)	4,061.17	-0.32%	54.12%

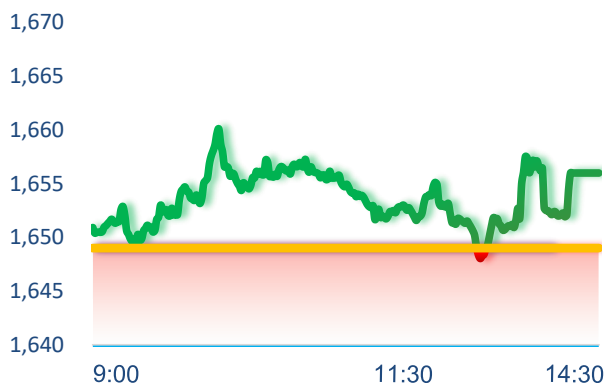
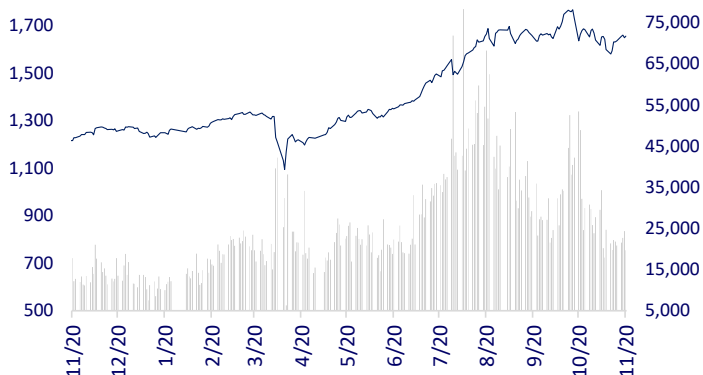
U.S. stocks fell on Thursday (Nov 20) as the rally fueled by Nvidia's earnings results lost momentum and investors lost hope that the Federal Reserve (Fed) would cut interest rates again in December 2025. Nvidia's reversal dragged the broader market lower. Its stock initially surged 5% after the chipmaker reported better-than-expected quarterly earnings and offered an upbeat sales forecast for Q4/2025. However, Nvidia closed down 3%, despite CEO Jensen Huang reassuring that demand for the company's current-generation Blackwell chips was "beyond expectations."

VIETNAM ECONOMY		1D (bps)	YTD (bps)
Vnibor	4.20%	13	23
Deposit interest 12M	4.60%	0	0
5 year-Gov. Bond	3.37%	3	89
10 year-Gov. Bond	3.72%	9	87
USD/VND	26,386	-0.01%	3.27%
EUR/VND	31,199	-0.32%	14.43%
CNY/VND	3,768	0.01%	5.81%

Brent crude oil prices fell over 2% late yesterday afternoon, as U.S. President Donald Trump's administration pushed Ukraine to accept a peace deal with Russia to end the three-year-long war.

VIETNAM STOCK MARKET		1D	YTD
VN-INDEX	1,655.99	0.42%	30.72%
HNX	264.23	-0.30%	16.18%
VN30	1,897.46	0.60%	41.10%
UPCOM	119.51	0.00%	25.72%
Net Foreign buy (B)	244.29		
Total trading value (B)	21,252.00	-20.40%	17.21%

VN-Index lost more than 10 points as the Banking, Real Estate, and Securities sectors corrected. Proprietary traders of securities companies recorded a net sell of VND 49 billion, mainly in EIB (VND 72 billion), STB (VND 32 billion), and MWG (VND 27 billion). In contrast, they net bought DGC (VND 87 billion), CII (VND 32 billion), and HHS (VND 30 billion).

**VNINDEX - INTRADAY**

**VNINDEX (1Y)**


UOB: Vietnam leads ASEAN in consumer optimism, driven by positive economic prospects;

Prepare infrastructure and human resources to operate the International Financial Center;

Commence construction of Metro Line No.2 and a series of major projects in Ho Chi Minh City to celebrate the Party Congress;

Mr. Trump threatens to fire the Treasury Secretary if the Fed does not cut interest rates;

U.S. trade deficit narrows sharply;

Cheap chips in an expensive rivalry threaten to paralyze the global automobile industry.

**EVENT CALENDAR**

Ticker	Ex-right Date	Last register Date	Exercise Date	Type	Rate	Value
TIX	21/11/2025	24/11/2025	24/12/2025	Cash		1,250
BTP	24/11/2025	25/11/2025	15/12/2025	Cash		330
BCE	24/11/2025	25/11/2025	10/12/2025	Cash		300
PVS	27/11/2025	28/11/2025		Stock	7:100	
FPT	1/12/2025	2/12/2025	12/12/2025	Cash		1,000
CTD	1/12/2025	2/12/2025	22/12/2025	Cash		1,000
MSH	1/12/2025	2/12/2025	25/12/2025	Cash		4,000
NTH	8/12/2025	9/12/2025	25/12/2025	Cash		1,000
TVT	12/12/2025	12/12/2025	15/01/2026	Cash		500
SAB	12/1/2026	13/01/2026	12/2/2026	Cash		2,000