

GLOBAL MARKET		1D	YTD
DJIA	47,716.42	0.61%	12.16%
S&P500	6,849.09	0.54%	16.45%
NASDAQ	23,365.69	0.65%	21.00%
VIX	16.35	-5.00%	-5.76%
FTSE 100	9,720.51	0.27%	18.93%
DAX	23,836.79	0.29%	19.73%
CAC40	8,122.71	0.29%	10.05%
Brent oil (\$/barrel)	63.14	0.22%	-15.87%
Gold (\$/ounce)	4,242.00	1.90%	60.98%

Wall Street recorded its fifth consecutive recovery session on Friday (28/11), helping November shift from a corrective phase to a slight increase. Three main factors contributed to this rebound: a better-than-expected jobs report (despite a slight uptick in unemployment), Walmart — regarded as a key gauge of consumer spending — issuing an optimistic outlook, and finally, growing expectations that the Fed will cut interest rates next month to support the economy.

VIETNAM ECONOMY		1D (bps)	YTD (bps)
Vnibor	5.30%	-50	133
Deposit interest 12M	4.60%	0	0
5 year-Gov. Bond	3.47%	-2	99
10 year-Gov. Bond	3.65%	-18	80
USD/VND	26,412	0.01%	3.37%
EUR/VND	31,334	-0.20%	14.92%
CNY/VND	3,786	-0.05%	6.32%

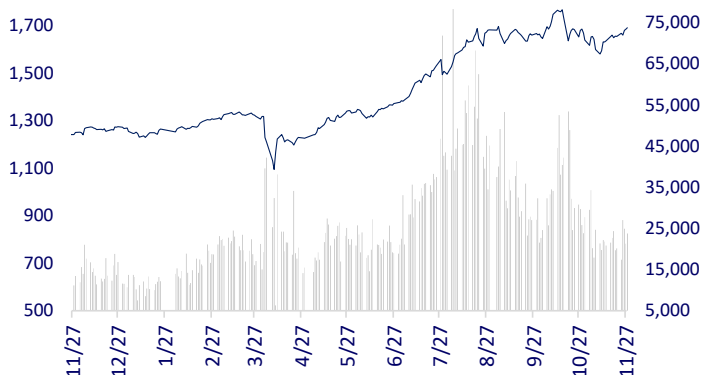
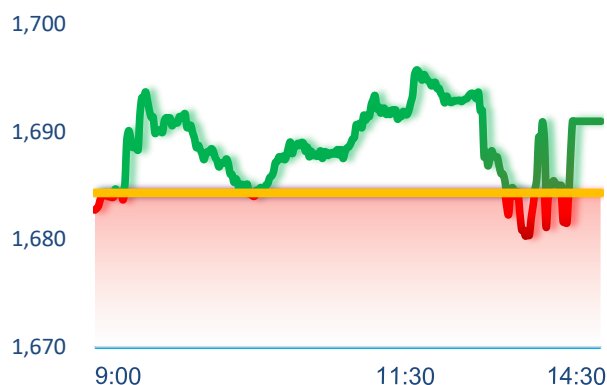
Following heightened expectations of a Fed rate cut, global gold futures saw strong buying momentum last week and at the start of this week's trading session. Specifically, gold futures returned to the 4,250 USD/oz mark early this morning (Vietnam time) — the highest level in more than a month, surpassing the previous peak set on November 13.

VIETNAM STOCK MARKET		1D	YTD
VN-INDEX	1,690.99	0.40%	33.49%
HNX	259.91	-0.58%	14.28%
VN30	1,923.92	0.14%	43.07%
UPCOM	119.22	-77.88%	25.42%
Net Foreign buy (B)	344.63		
Total trading value (B)	25,555.00	12.93%	40.95%

VN-Index edged up more than 6 points thanks to capital inflows lifting key blue-chip stocks such as the Vin group and VNM. On November 28, proprietary trading desks of securities firms recorded a net sell of VND 393 billion after five consecutive net-buying sessions, with major net sells including VHM (VND 59 billion), HDB (VND 59 billion), and HPG (VND 45 billion).

VNINDEX - INTRADAY

VNINDEX (1Y)



PMI November 2025: Vietnam's manufacturing sector continued to grow despite disruptions caused by storms;
The National Assembly enters its 7th working week: Focusing resources on major policy decisions of the session;
Completion of Ring Road 2.5 expected in Q1/2026;
Germany's Parliament approves a record-high 2026 budget;
Gasoline prices in the U.S. drop to a record low;
Concerning information about population aging in South Korea and Japan.

EVENT CALENDAR

Ticker	Ex-right Date	Last register Date	Exercise Date	Type	Rate	Value
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
IDC	3/12/2025	4/12/2025	23/12/2025	Cash		1,500
LBM	3/12/2025	4/12/2025	19/12/2025	Cash		2,500
NTH	8/12/2025	9/12/2025	25/12/2025	Cash		1,000
DRL	9/12/2025	10/12/2025	24/12/2025	Cash		1,200
TVT	12/12/2025	15/12/2025	15/01/2026	Cash		5,000
HTG	18/12/2025	19/12/2025	19/01/2026	Cash		2,500
SAB	12/1/2026	13/01/2026	12/2/2026	Cash		2,000