Pinetree SECURITIES

MORNING BRIEF

7/27/2026

GLOBAL MARKET		1D	YTD
DJIA	51,947.25	0.46%	8.08%
S&P500	7,411.98	0.05%	8.28%
NASDAQ	24,975.82	-0.64%	7.46%
VIX	18.58	-0.64%	24.28%
FTSE 100	10,736.23	0.91%	8.10%
DAX	25,099.00	1.36%	2.49%
CAC40	8,372.28	0.88%	2.73%
Brent oil ($/barrel)	87.91	-12.07%	44.71%
Gold ($/ounce)	4,109.87	1.63%	-5.09%

On July 24, the S&P 500 was flat, the Nasdaq fell as semiconductor stocks were sold off sharply as investors continued to monitor the conflict in the Middle East. In the middle of the session, stocks rose, while oil prices fell, after Reuters, citing 3 sources from Pakistan, said the country was considering a direction to establish new peace talks between the US and Iran, with a push from the Chinese side.

VIETNAM ECONOMY		1D (bps)	YTD (bps)
Vnibor	2.47%	-52	-563
Deposit interest 12M	5.90%	0	130
5 year-Gov. Bond	4.19%	-1.8	82
10 year-Gov. Bond	4.46%	0.0	55
USD/VND	26,510	0.04%	0.50%
EUR/VND	30,722	-0.28%	-2.94%
CNY/VND	3,950	0.07%	3.36%

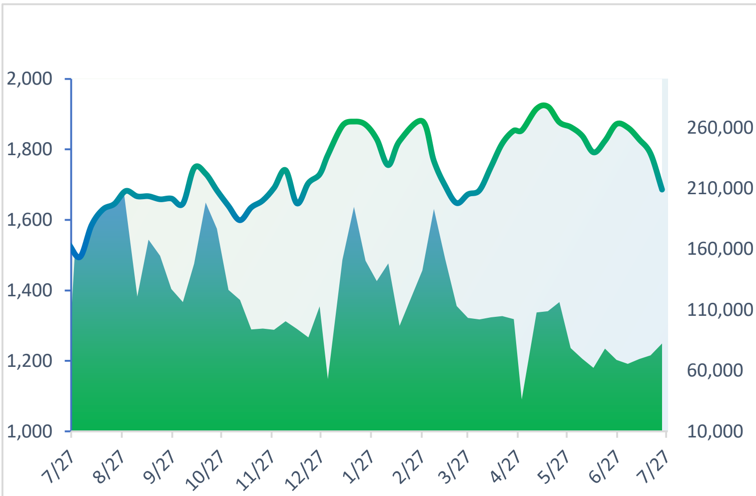
Crude oil prices continued to fall sharply in trading on Monday (July 27), losing about 5%, after US President Donald Trump paused attacks on Iran after two weeks of fighting.

VIETNAM STOCK MARKET		1D	YTD
VN-INDEX	1,686.11	-0.78%	-5.51%
HNX	272.99	-2.87%	9.74%
VN30	1,829.36	-0.86%	-9.91%
UPCOM	125.89	0.29%	4.07%
Net Foreign buy (B)	-1,295.17		
Total trading value (B)	14,985.94	-30.42%	-38.32%

In the session of 24/07, VN-Index retreated by more than 13 points when world stocks simultaneously plunged under oil price pressure and Middle East tensions, especially the upstream oil and gas group broke through.

VNINDEX - INTRADAY

VNINDEX (1Y)



SELECTED NEWS

The Prime Minister requested to submit a scheme on overall reform of the financial market in July;
Standard Chartered raised Vietnam's GDP growth forecast in 2026 to 9.5%, 2027 to reach 11%;
The trade deficit exceeded $20 billion for the first time in 30 years;
Fed officials are worried about persistent inflation, calling for a slight increase in interest rates soon;
The US announced new tariffs for 60 economies, replacing the global tax of 10%;
China imposes consumption taxes on lithium-ion batteries and solar batteries.

EVENT CALENDAR

Ticker	Ex-right Date	Last register Date	Exercise Date	Type	Rate	Value
DRL	7/22/2026	7/23/2026	8/4/2026	Cash	15%	1,500
IDC	7/23/2026	7/24/2026	7/23/2026	Stock	10%	
IDC	7/23/2026	7/24/2026	8/14/2026	Cash	15%	1,500
CTG	7/23/2026	7/24/2026	8/27/2026	Cash	5%	450
BKC	7/23/2026	7/24/2026	7/23/2026	Stock	29%	