



EFFORT TO ADVANCE

March 04, 2025



RECOMMENDED STOCK

TICKER: MWG

ANALYST-PINBOARD

Update on CTG

MARKET AND TRADING STRATEGY

MARKET COMMENTARY

- The market continued to test the previous peak area around 1,306 points throughout the trading session and approached the 1,310 resistance level towards the session's close. Liquidity increased compared to the previous session, indicating that cash flow is still making efforts to support the market despite negative news from the BCG-related stock group.
- Although it has not yet been able to overcome the 1,310 resistance level, cash flow is still attempting to cushion the market, hence it is anticipated that the market will persist in testing this resistance level in the next trading session. Should it break through the 1,310 level with healthy liquidity, the market will have an opportunity to extend its upward momentum.

TRADING STRATEGY

- Investors can anticipate the potential to extend the market's upward momentum.
- Investors may continue to consider exploring short-term buying opportunities in stocks, prioritizing stocks with positive developments from a good support base or have pulled back to a favorable support area.
- However, Investors should still consider taking short-term profits on stocks that have increased rapidly to the resistance area to reap the rewards.

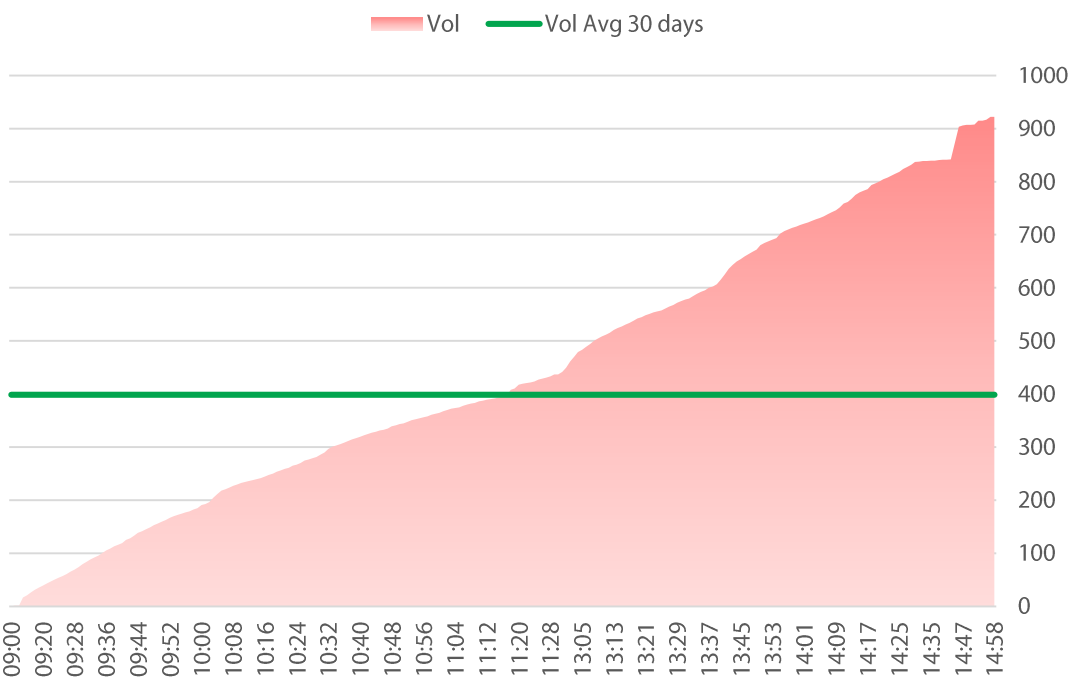
VN-INDEX TECHNICAL SIGNALS

TREND: UPTREND



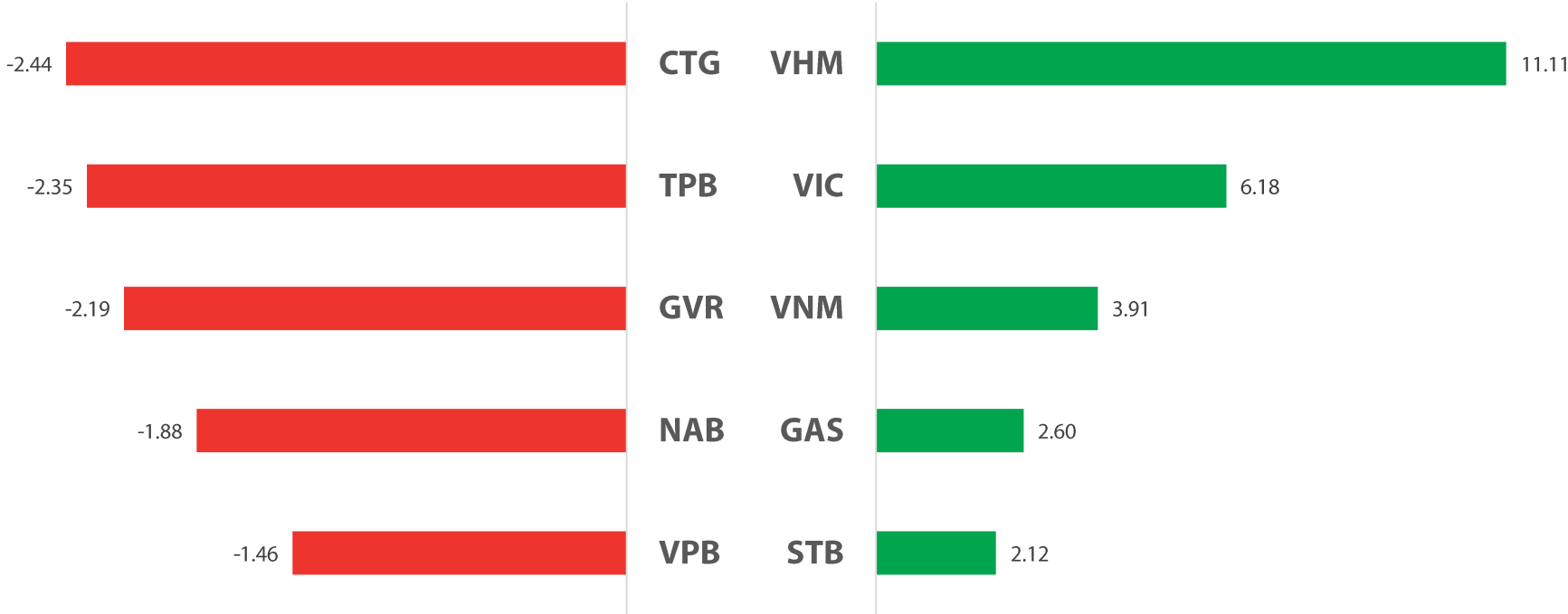
MARKET INFOGRAPHIC

TRADING VOLUME (MILLION SHARES)

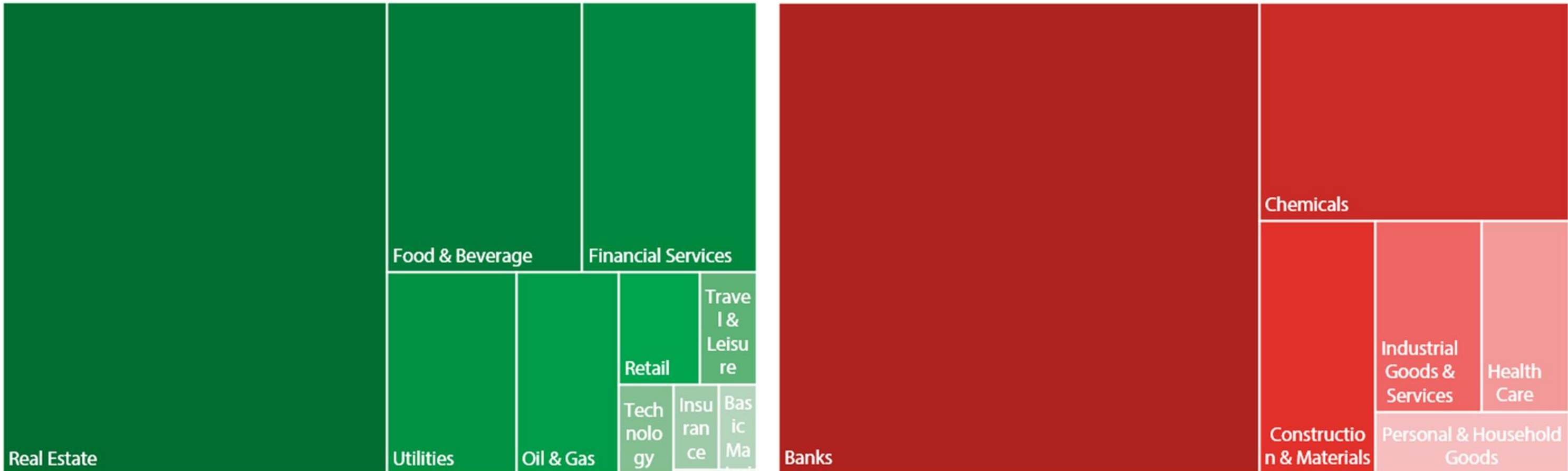


March 03, 2025

TOP STOCKS CONTRIBUTING TO THE INDEX (%)



TOP SECTOR CONTRIBUTING TO THE INDEX (%)



Mobile World Investment Corporation

MWGHOSE

TARGET PRICE

66,000 VND

Recommendation - BUY

Recommended Price (04/03/2025) (*)

57,800 – 59,000

Short-term Target Price 1

62,000

Expected Return 1
(at recommended time):

▲ 5,1% - 7,3%

Short-term Target Price 2

66,000

Expected Return 2
(at recommended time):

▲ 11,9% - 14,2%

Stop-loss

55,800

(* Recommendation is made before the trading session)

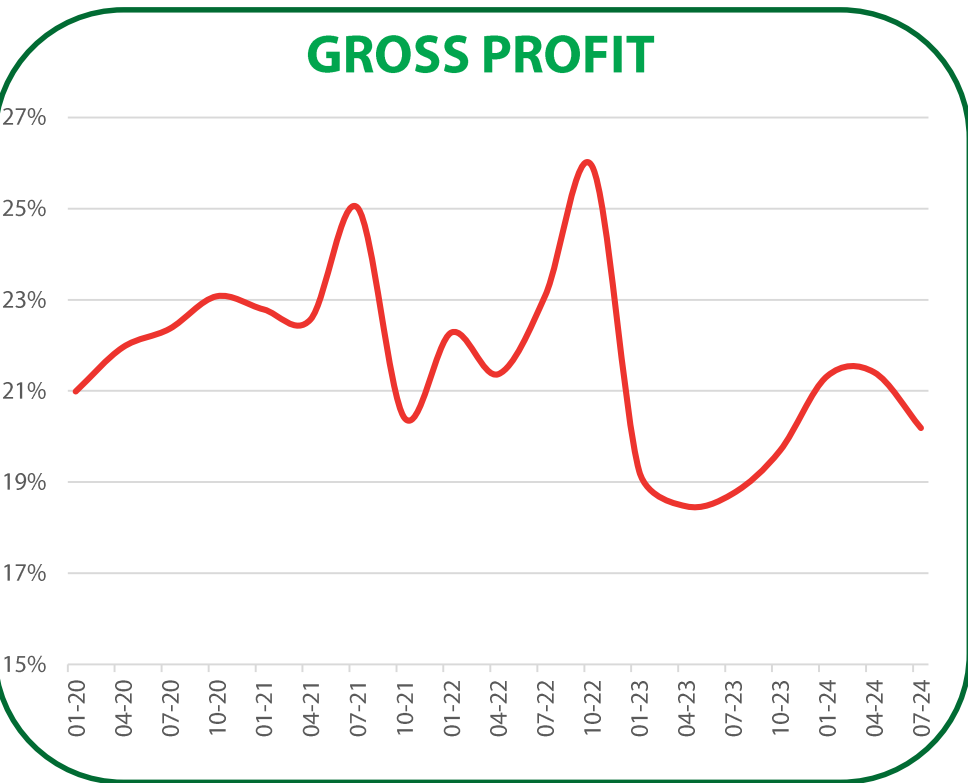
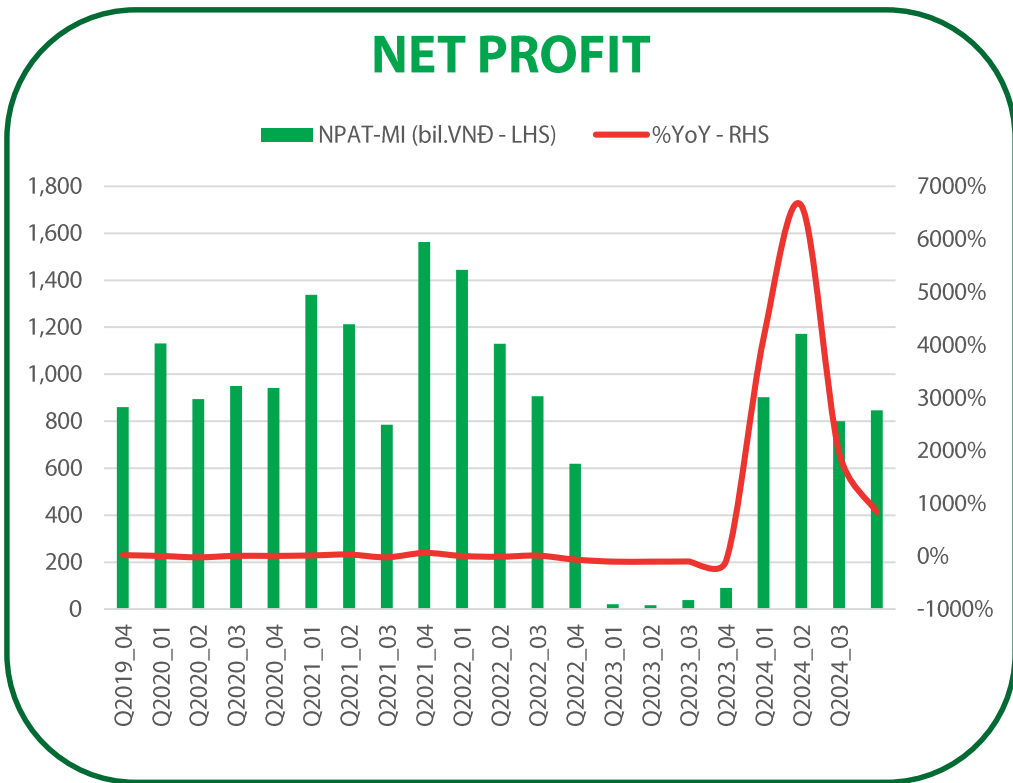
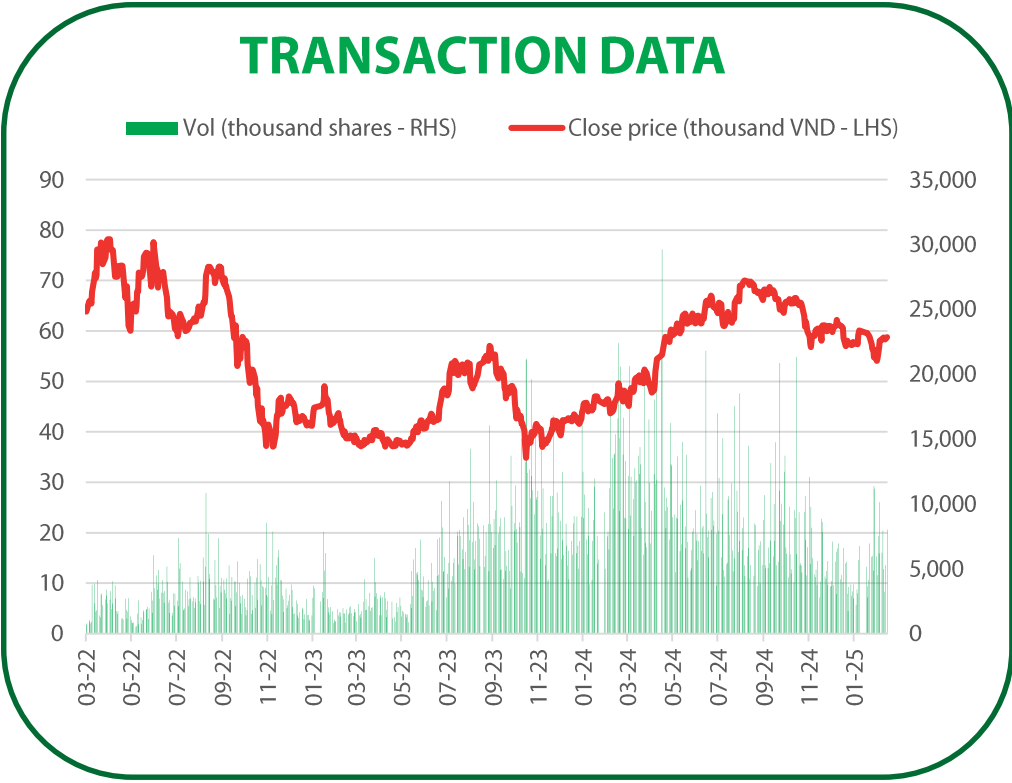
STOCK INFO

| | |
|--------------------------------|---------------|
| Sector | Retail |
| Market Cap (\$ mn) | 85,935 |
| Current Shares O/S (mn shares) | 1,461 |
| 3M Avg. Volume (K) | 5,181 |
| 3M Avg. Trading Value (VND Bn) | 303 |
| Remaining foreign room (%) | 3.7% |
| 52-week range ('000 VND) | 45.141-70.000 |

INVESTMENT THESIS

- MWG's FY2024 earnings showed a recovery, with revenue reaching VND 134,341 billion (+13.6% YoY) and net profit after tax at VND 3,722 billion (+2,119.8% YoY), supported by operational cost optimization and improved business efficiency. In Q4-FY24, revenue totaled VND 34,574 billion (+10.0% YoY, +1.3% QoQ), indicating stable growth momentum.
- Thegioididong chain (TGDĐ) and Dien May Xanh chain (ĐMX) remained the primary revenue drivers, maintaining stability due to a recovery in consumer demand and a well-optimized product portfolio. Bach Hoa Xanh chain (BHX) remains in its operational restructuring phase, focusing on store efficiency and margin improvement.
- For 2025, MWG targets revenue of VND 150,000 billion (+11.7% YoY) and net profit after tax attributable to shareholders of VND 4,850 billion (+30.3% YoY), driven by store expansion, business model optimization at BHX, and sustained growth at TGDĐ & ĐMX. The company continues to tighten cost controls, enhance supply chain efficiency, and capitalize on the recovery in consumer spending.
- Using a 50:50 weighting between the long-term DCF valuation method and the short-term SOTP approach, MWG's one-year target price is estimated at VND 63,700 per share.

KEY FINANCIAL INDICATORS



TECHNICAL VIEW

- Following a relatively rapid decline from the 60 area down to the 56 - 57 support area in early February 2025, MWG quickly recovered back above the 56 - 57 area and advanced towards the MA(50) area, the 58.5 area. Currently, MWG is experiencing sideways fluctuation within the 57.5 - 59 area. Although there has been no decisive upward movement, generally, MWG is finding support on pullbacks, evidenced by numerous candlesticks with closing prices higher than opening prices. These signals may continue to generate supportive momentum for MWG and create an opportunity to extend its upward movement in the future.
- Support : 57,000 VND.
- Resistance : 67,000 VND.



| Ticker | Technical Analysis |
|-----------------------------------|---|
| <div>SSI</div> <div>Uptrend</div> | <div><div>Support</div><div>24.9</div><div>Current Price</div><div>26.6</div><div>Resistance</div><div>28.4</div></div> <div><p>SSI's upward momentum continues to show positive signals after breaking above the 26.2 resistance level, which aligns with the MA 200 and the downtrend line from April 2024. Notably, the stock rebounded strongly after briefly testing the 26.2 area during the session. Additionally, volume remains above the MA 20, indicating sustained buying interest. With this positive reaction, SSI is expected to soon advance toward the 28.4 peak.</p></div> <div></div> |
| <div>VSC</div> <div>Sideway</div> | <div><div>Support</div><div>17.8</div><div>Current Price</div><div>18.5</div><div>Resistance</div><div>22.0</div></div> <div><p>Although VSC continues to be supported by the MA 20, its upward momentum remains capped around the 18.6 level. The repeated appearance of long upper wicks at this price zone reflects persistent selling pressure. Additionally, the downward revision of Q4/2024 financial reports is likely to trigger a supply shock at the MA 20. Therefore, investors should prioritize taking profits at the current price range.</p></div> <div></div> |



(Tung Do- tung.dt@vdsc.com.vn)

- Table 1: Q4-2024 and 2024 results

| Unit: VND Bn | Q4-2024 | QoQ | YoY | 2024 | YoY | 2024F | % Diff. vs 2024F |
|-------------------------------|---------------|------------|------------|---------------|------------|---------------|------------------|
| NII | 16,312 | 5% | 12% | 62,403 | 3% | 63,221 | -1% |
| NFI | 1,240 | -31% | -20% | 6,706 | 8% | 6,597 | 2% |
| Gain/losses from FX | 1,051 | -18% | 38% | 4,190 | 14% | 4,040 | 4% |
| Gain/losses from bond trading | 22 | -3% | -130% | -240 | 63% | 99 | -342% |
| Other incomes | 3,733 | 8% | 59% | 8,459 | 124% | 6,811 | 24% |
| TOI | 21,285 | -3% | 15% | 81,909 | 11% | 81,142 | 1% |
| OPEX | -6,576 | 8% | 4% | -22,552 | 11% | -23,781 | -5% |
| PPOP | 14,710 | -7% | 21% | 59,357 | 11% | 57,361 | 3% |
| Provisioning expenses | -2,464 | -73% | -45% | -27,599 | 8% | -27,842 | -1% |
| PBT | 12,245 | 87% | 59% | 31,758 | 14% | 29,519 | 8% |
| Credit growth (%)* | 16.9 | 7.2 | 16.9 | 16.9 | 136 bps | 16.7 | -12 bps |
| Mobilization growth (%)* | 15.1 | 6.6 | 15.1 | 15.1 | 119 bps | 15.8 | 65 bps |
| NIM (%) | 2.87 | -2 bps | -18 bps | 2.88 | 2 bps | 2.92 | 4 bps |
| YoEA (%) | 5.80 | -3 bps | -115 bps | 5.74 | -141 bps | 6.10 | 36 bps |
| CoF (%) | 3.05 | -1 bps | -101 bps | 3.21 | -150 bps | 3.30 | 9 bps |
| CIR (%) | 30.9 | 308 bps | -323 bps | 27.5 | -145 bps | 29.3 | 178 bps |
| NPL | 1.25 | -20 bps | 12 bps | 1.2 | 12 bps | 1.1 | -14 bps |
| Credit cost (%) | 0.1 | -44 bps | -16 bps | 1.7 | -10 bps | 1.7 | 2 bps |
| ROAE (%) | 18.4 | 180 bps | 132 bps | 18.4 | 138 bps | 17.3 | -104 bps |

*If you are interested in this content, please click on the **link** to view more details.*



| Date | Ticker | Current Price | Entry Price | Short-term Target Price 1 | Short-term Target Price 2 | Stop-loss | Exit Price | Gain/ Loss | Status | Change of VN-Index (*) |
|---------------------------|--------|---------------|-------------|---------------------------|---------------------------|-----------|------------|------------|----------------|------------------------|
| 28/02 | IJC | 14.65 | 14.80 | 17.00 | 19.00 | 14.20 | | -1.0% | | 0.1% |
| 27/02 | VSC | 18.50 | 18.20 | 19.50 | 21.50 | 17.30 | 18.50 | 1.6% | Closed (03/03) | 0.5% |
| 26/02 | TCH | 17.80 | 17.00 | 20.00 | 22.80 | 15.80 | | 4.7% | | 0.5% |
| 25/02 | MBB | 23.10 | 23.10 | 24.80 | 27.50 | 21.70 | | 0.0% | | 0.4% |
| 25/02 | HDB | 23.00 | 23.30 | 25.00 | 27.00 | 22.30 | | -1.3% | | 0.4% |
| 21/02 | VPB | 19.20 | 19.10 | 20.80 | 22.80 | 17.90 | | 0.5% | | 1.3% |
| 20/02 | HPG | 28.05 | 26.50 | 28.30 | 29.80 | 25.20 | | 5.8% | | 1.6% |
| 19/02 | REE | 72.60 | 67.50 | 72.00 | 75.70 | 64.40 | 75.70 | 12.1% | Closed (24/02) | 2.1% |
| 10/02 | VCB | 93.30 | 92.20 | 99.00 | 109.00 | 89.40 | | 1.2% | | 2.7% |
| 10/02 | DDV | 20.40 | 18.20 | 20.70 | 22.50 | 16.90 | | 12.1% | | 2.7% |
| 06/02 | DPM | 36.85 | 35.20 | 38.50 | 43.00 | 32.90 | | 4.7% | | 3.1% |
| 05/02 | BID | 40.95 | 39.60 | 42.50 | 45.50 | 37.30 | | 3.4% | | 3.5% |
| Average performance (QTD) | | | | | | | | 4.9% | | 1.2% |

(*) Change of VN-Index (calculated from Recommendation date to position closing date) is the basis for comparing recommendation effectiveness.

Vietnam events

Global events

| Date | Events |
|--|--|
| 03/03/2025 | Publication of PMI (Purchasing Managers Index) |
| 06/03/2025 | Announcement of Vietnam's economic data February 2024 |
| 07/03/2025 | Puclication of FTSE ETF portfolio |
| 14/03/2025 | Puclication of VNM ETF portfolio |
| 20/03/2025 | Expiry date of VN30F2503 futures contract |
| 21/03/2025 | Related ETFs FTSE ETF and VNM ETF complete portfolio restructuring |
| *FTSE Russell assesses Vietnam stock market classification in March 2025 | |

| Date | Countries | Events |
|------------|-----------|--|
| 03/03/2025 | U.S | Final Manufacturing PMI |
| 04/03/2025 | U.K | Annual Budget Release |
| 06/03/2025 | EU | ECB Monetary Policy Statement |
| 06/03/2025 | EU | Retail Sales m/m |
| 07/03/2025 | U.S | Nonfarm Payroll |
| 11/03/2025 | U.S | JOLTS Job Openings |
| 12/03/2025 | U.S | CPI m/m |
| 13/03/2025 | U.S | PPI m/m |
| 13/03/2025 | China | New Home Prices m/m |
| 14/03/2025 | U.K | GDP m/m |
| 17/03/2025 | U.S | Retail Sales m/m |
| 19/03/2025 | EU | Final CPI y/y |
| 20/03/2025 | U.S | FOMC Meeting Minutes |
| 20/03/2025 | U.K | BOE Monetary Policy Report |
| 20/03/2025 | China | Loan Prime Rate |
| 26/03/2025 | U.K | CPI y/y |
| 28/03/2025 | U.S | Core PCE Price Index m/m & Final GDP q/q |
| 28/03/2025 | U.K | Retail Sales m/m |



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RONGVIET RECENT REPORTS

| COMPANY REPORTS | Issued Date | Recommend | Target Price |
|---|---------------------------|---------------------|--------------|
| TNG - Upside potential is limited as high-growth phase ends | Dec 02 nd 2024 | Accumulate – 1 year | 26,700 |
| VHC - Export volume remains the key driver of growth momentum | Nov 18 th 2024 | Observe – 1 year | 73,300 |
| GDA - Attractive Valuation & Potential from New Factory | Nov 01 st 2024 | Buy – 1 year | 38,700 |
| FRT - Heading to the future with health care platform | Oct 31 st 2024 | Observe – 1 year | n/a |
| MWG – Back on the growth race in the medium term by Bach Hoa Xanh | Oct 21 st 2024 | Neutral – 1 year | 63,700 |
| Please find more information at https://www.vdsc.com.vn/en/research/company | | | |

FUND CERTIFICATES INFORMATION

| Fund name | Trading Day | Subscription Fee (% of trading value) | Redemption Fee (% of trading value) | NAV per unit at valuation date | NAV per unit last valuation date | Change in NAV |
|-----------|-------------|---------------------------------------|-------------------------------------|--------------------------------|----------------------------------|---------------|
| DFVN-CAF | 17/11/2020 | 0% - 0.20% | 0% - 0.20% | 10,773 | 10,738 | 0.33% |
| ENF | 19/11/2020 | 0% - 3% | 0% | 21,868 | 21,433 | 2.03% |
| MBBF | 10/02/2020 | 0%- 0.5% | 0%-1% | 11,567 | 11,462 | 0.92% |
| MBVF | 12/11/2020 | 0% | 0%-1.4% | 16,483 | 16,326 | 0.96% |
| VF1 | 25/11/2020 | 0% - 0.6% | 0% - 3% | 46,218 | 46,303 | -0.18% |
| VF4 | 25/11/2020 | 0% - 0.6% | 0% - 3% | 18,901 | 18,945 | -0.23% |
| VFB | 19/11/2020 | 0% - 0.6% | 0% - 3% | 20,557 | 20,529 | 0.13% |

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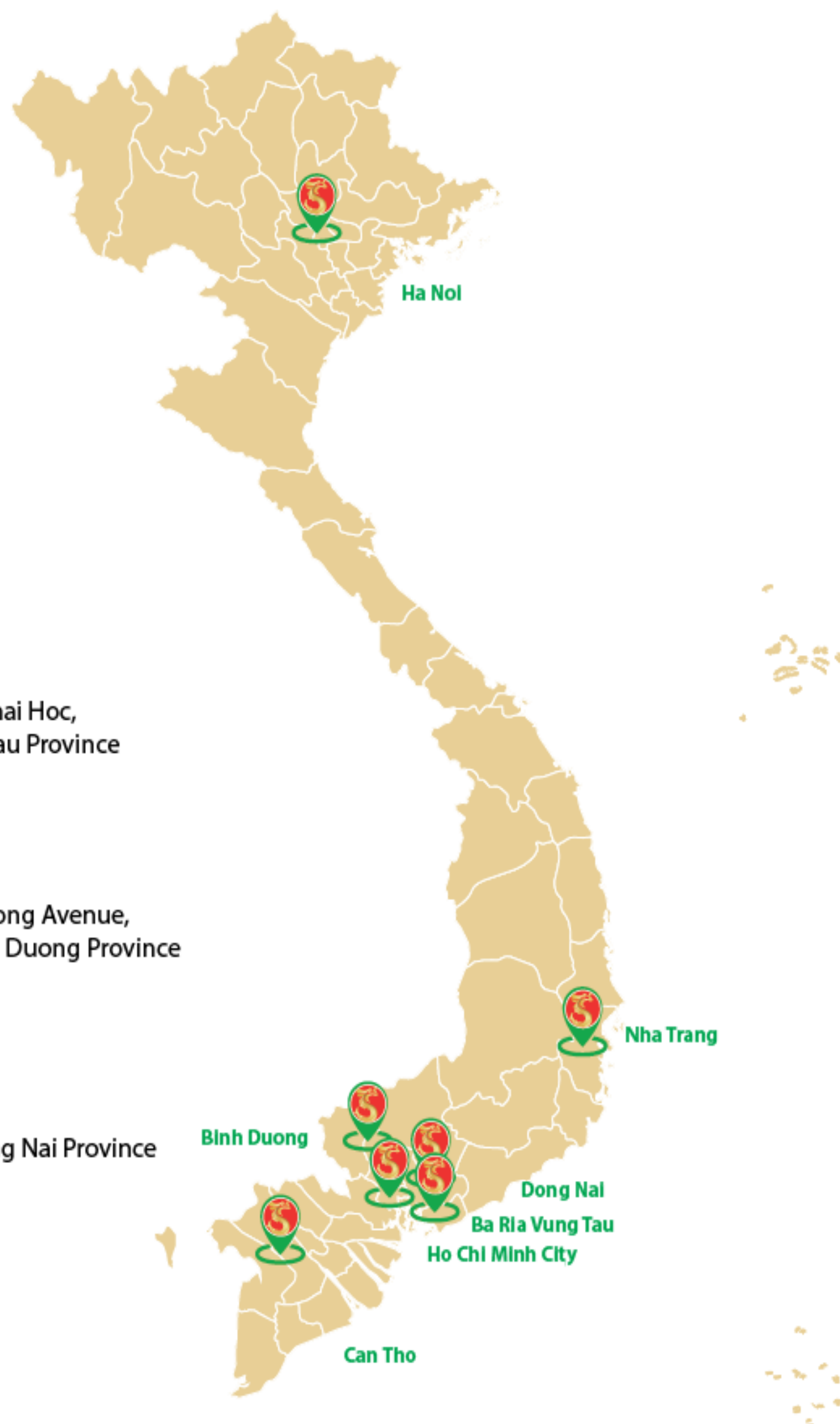
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