

## Weekly Wrap: Where's the consolidation?

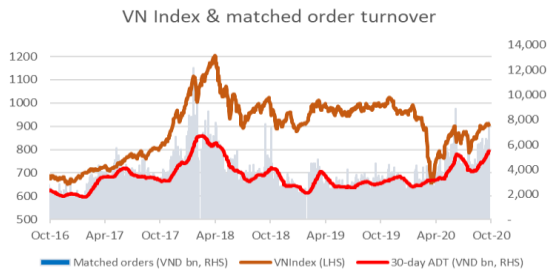
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The mainboard rose another 1.9% last week to reach a weekly high of 961 points. The VNI is now flat YTD after rising 46% off the bottom in March. It may be hard to believe, but the VNI is now just 3% below its YTD peak in January and 4% below our 1000-point 2020 index target. Another technical highlight from last week: the VNI's 200-day moving average ticked higher on October 23 after falling for the past 11 months.



### Index, Flows, and FX Performance

- **VNINDEX:** 961 (+1.9% WoW / 0.0% YTD / -2.7% YoY)
- **VHINDEX:** 142 (+1.3% WoW / +38.2% YTD / +36.1% YoY)
- **UPCOM Index:** 63.9 (+0.1% WoW / +13.0% YTD / +12.9% YoY)
- **Average daily turnover:** US\$410mn (-13% WoW)
- **Foreigners net sold** US\$106mn of 3-index constituents.
- **VND:USD rate:** 23,178 (-5bp WoW / -2bp YTD / +13bp YoY)

### VN30 Components

Ticker	Closing price (VND K)	WoW chg	Cont to VN30 (WoW)	TTM PE (x)
BID	42.8	1.4%	0%	20
CTG	31.8	2.1%	2%	11
EIB	17.5	0.9%	1%	31
FPT	53.9	1.3%	2%	13
GAS	73.5	-2.5%	-1%	16
HDB	25.5	2.6%	2%	8
HPG	30.9	6.2%	16%	12
KDH	24.4	2.7%	1%	12
MBB	18.9	5.6%	7%	6
MSN	86.0	7.5%	11%	26
MWG	110.0	2.9%	4%	13
NVL	62.3	0.0%	0%	16
PLX	49.5	-0.9%	0%	57
PNJ	68.0	-0.1%	0%	15
POW	10.3	0.0%	0%	11
REE	42.0	1.0%	0%	9
ROS	2.3	4.5%	0%	--
SAB	185.8	-1.4%	-1%	29
SBT	15.3	-1.2%	0%	25
SSI	17.9	-1.4%	0%	10
STB	14.6	5.8%	6%	11
TCB	24.0	6.0%	14%	8
TCH	20.5	-2.8%	0%	7
VCB	87.5	-0.8%	-1%	19
VHM	79.5	3.2%	4%	12
VIC	104.0	6.6%	16%	44
VJC	105.3	0.3%	0%	30
VNM	110.0	2.4%	7%	24
VPB	25.7	4.5%	8%	6
VRE	28.4	3.1%	2%	27

Source: Bloomberg, Yuanta Vietnam. Pricing date: October 23, 2020.

**Local investor liquidity remains the key driver.** ADT of US\$410m was down 13% WoW, but the 30-day moving ADT (US\$407m) is at a YTD peak. Market breadth shifted back to positive for the VNI components (190 gainers vs 164 losers) and remained so for the VN30 heavyweights (20 gainers vs 8 losers). This is despite continued foreign net selling of Vietnamese stocks. HPG (+6.2% WoW) and VIC (+6.6%) were the largest positive contributors to the index, while MSN (+7.5% WoW but +60% since the start of October) continued its remarkable rally.

**Spare a thought for the energy sector,** which has been the worst performing sector YTD (-19%, as defined by Bloomberg). PC1 (BUY) is analyst Binh Truong's top fundamental pick given its new capacity, but it has already outperformed. We see greater upside to our target price for POW (BUY), which posted weak 3Q20 preliminary results that won't improve much in 4Q20. However, POW's operational results should turn around in 2021 given improved demand and gas supply.

**Every dog has its day.** To the latter point, GAS (Not Rated) management disclosed last week that its new natural gas field should be operational starting from next month. This bolsters our confidence in POW because it should help alleviate the gas input supply issue for thermal energy producers more rapidly than we had expected. We see 30% 12-m total returns for POW.

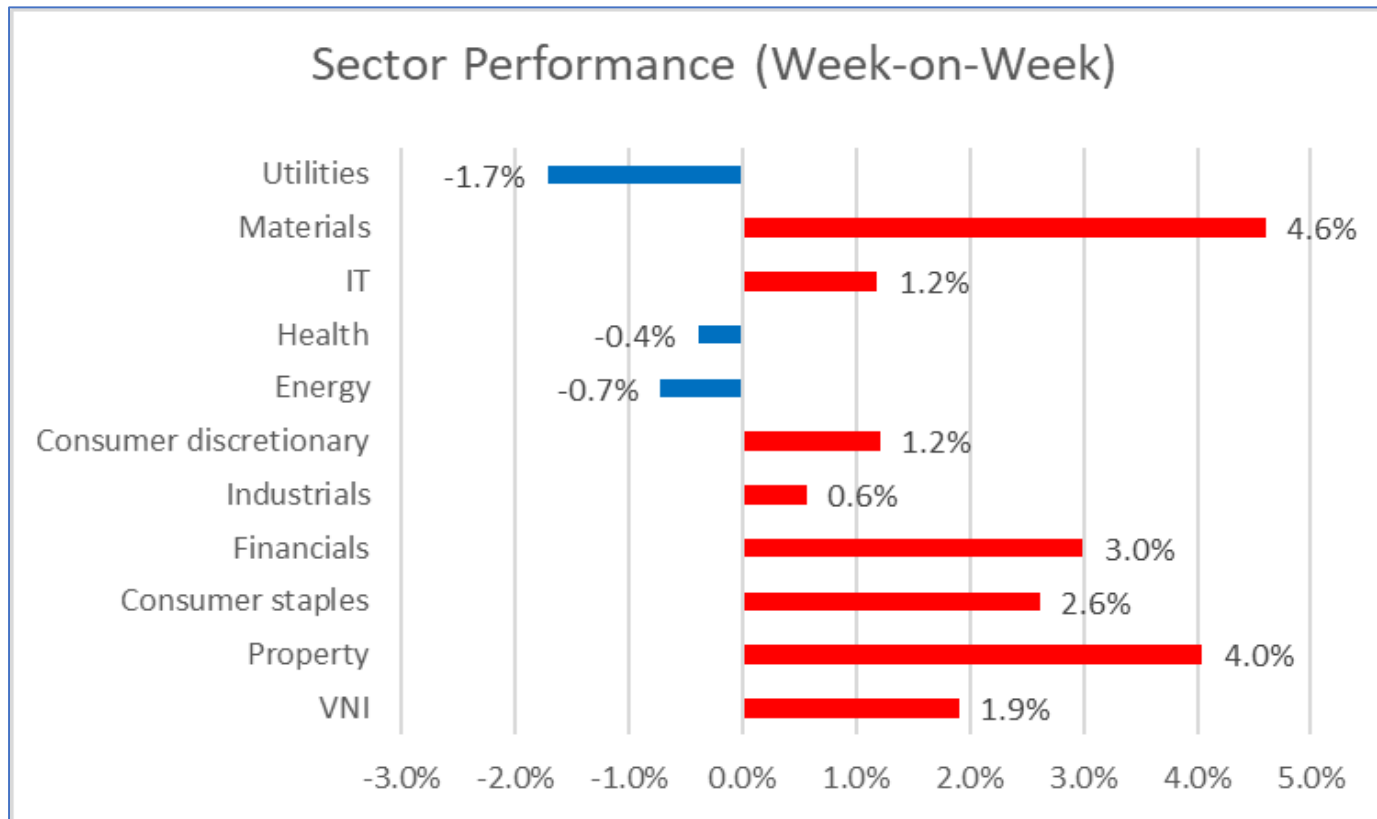
**Where's the consolidation?** We had anticipated a round of selling-the-news to accompany the inundation of 3Q20 results that began last week, but this has not emerged in any broad sense. We still think that a moderate c.5% VNI correction is not improbable in the short term given the ephemeral nature of retail investor positions (and retailers, not institutions, have been the key drivers of this market). Nevertheless, we remain positive for the medium term outlook and are more convinced than ever that our yearend VNI target of 1000 points faces upside risk.

## Yuanta Vietnam Coverage Universe

Sector	Company	Stock code	Market cap (USDm)	3-month ADT (USDm)	Yuanta Rating	Current price (VND)	Target price (VND)	Up (down) side	2020E Dividend yield	12-m TSR*
<b>Banks</b>	Asia Commercial Bank	ACB VN	2,387	7.4	BUY	25,600	25,690	0%	0.0%	0%
	BIDV	BID VN	7,427	2.5	SELL	42,800	37,300	-13%	0.0%	-13%
	HD Bank	HDB VN	1,379	1.5	HOLD-Underperform	25,450	23,820	-6%	0.0%	-6%
	MB Bank	MBB VN	2,255	4.5	BUY	18,850	22,500	19%	0.0%	19%
	Sacombank	STB VN	1,132	7.3	BUY	14,550	12,950	-11%	0.0%	-11%
	Vietcombank	VCB VN	14,002	3.8	HOLD-Underperform	87,500	75,140	-14%	0.0%	-14%
	Vietnam Prosperity Bank	VPB VN	2,703	5.0	HOLD-Underperform	25,700	22,500	-12%	0.0%	-12%
<b>Brokers</b>	HCM City Securities	HCM VN	291	2.4	BUY	22,100	26,532	20%	6.0%	26%
	Saigon Securities	SSI VN	464	3.7	HOLD-Outperform	17,900	18,328	2%	3.4%	6%
	Viet Capital Securities	VCI VN	274	1.1	HOLD-Underperform	38,350	26,449	-31%	2.2%	-29%
	VNDirect Securities	VND VN	144	0.6	HOLD-Underperform	16,000	13,150	-18%	4.3%	-13%
<b>Energy</b>	PV POW	POW VN	1,041	2.0	BUY	10,300	13,137	28%	2.9%	30%
	PV NT2	NT2 VN	281	0.3	BUY	22,600	25,181	11%	8.8%	20%
	PCC1	PC1 VN	155	0.3	BUY	22,600	24,092	7%	0.0%	7%
<b>Consumer</b>	Masan Group	MSN VN	4,359	5.4	HOLD-Outperform	86,000	84,908	-1%	0.0%	-1%
	Phu Nhuan Jewelry	PNJ VN	660	1.8	HOLD-Outperform	68,000	86,200	27%	2.9%	30%
	Digiworld	DGW VN	98	1.0	HOLD-Outperform	52,800	31,574	-40%	2.7%	-37%
<b>Oil &amp; GAS</b>	PV Drilling	PVD VN	207	2.8	HOLD-Outperform	11,400	10,429	-9%	0.0%	-9%
<b>Property</b>	Nam Long	NLG VN	318	1.2	BUY	26,750	36,400	36%	1.9%	38%
	Novaland	NVL VN	2,649	3.9	HOLD-Outperform	62,300	65,073	4%	0.0%	4%
	Khang Dien	KDH VN	588	0.6	BUY	24,400	31,081	27%	2.0%	29%
	Vinhomes	VHM VN	11,283	6.3	BUY	79,500	94,862	19%	0.0%	19%
<b>Transport</b>	Airports Corp Vietnam	ACV VN	5,964	0.6	HOLD-Underperform	63,500	76,400	20%	0.8%	21%

\*Notes: 1) TSR = Total shareholder return over the next 12 months inclusive of expected share price change and dividends. 2) 3-month ADT refers to matched orders and does not include put-through blocks. 3) Stock ratings and pricing data is as of close on October 23, 2020.

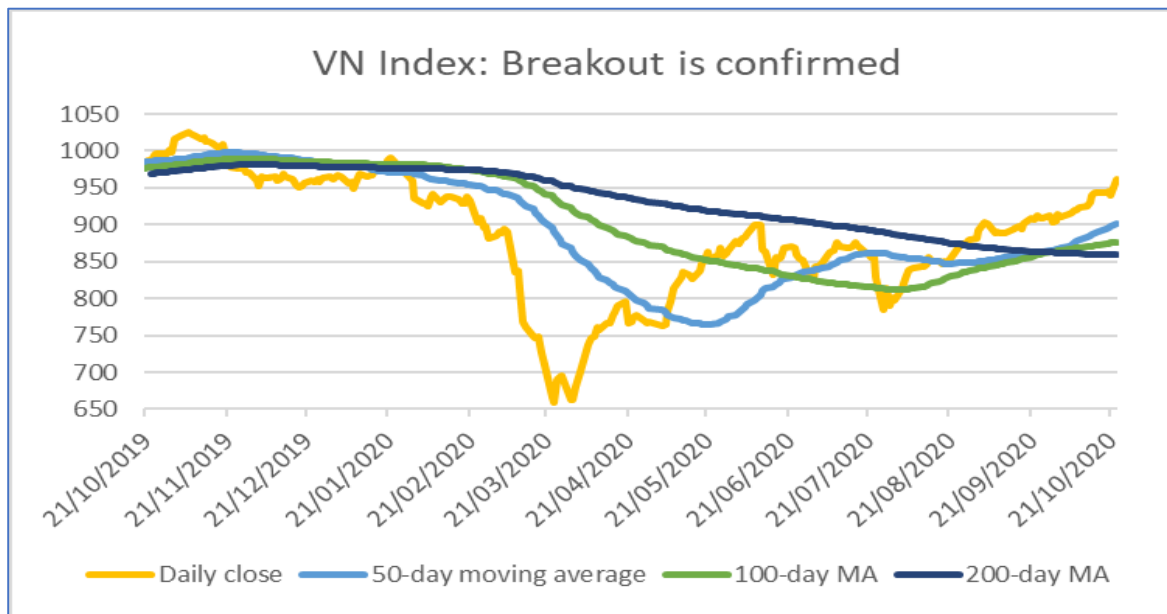
Source: Bloomberg, Yuanta Vietnam



Source: Bloomberg

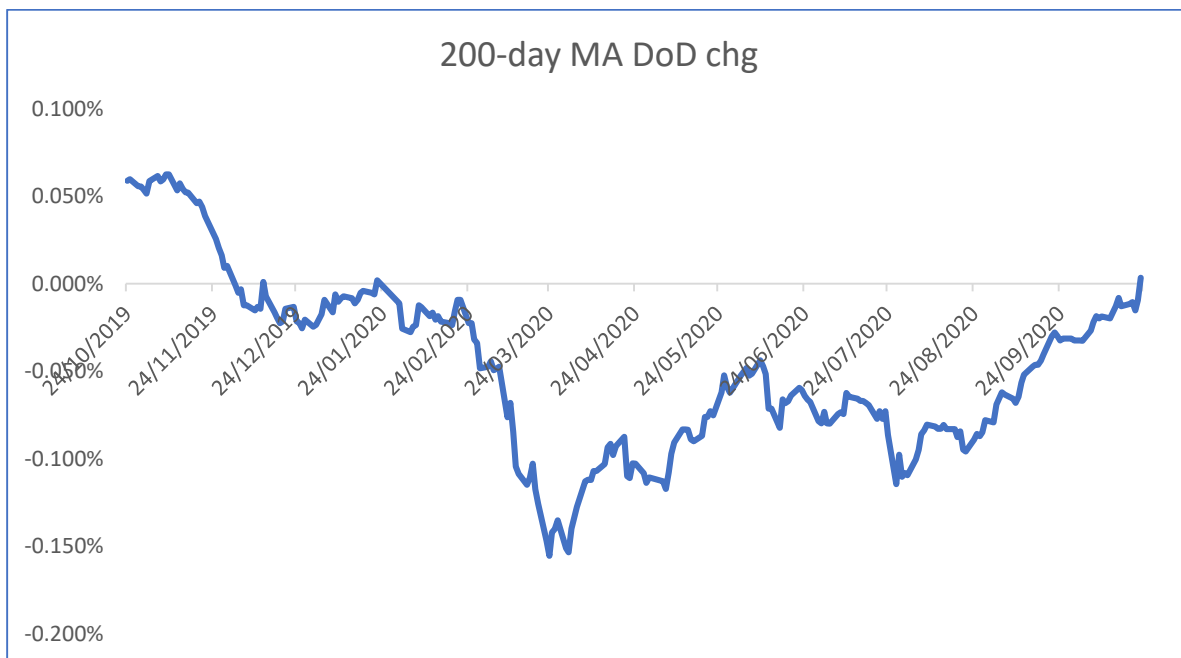
## Momentum indicators continue to herald medium-term strength

The “golden cross” of late September, which saw the VNI’s 50- and 100-day moving averages surpass the 200-day moving average within a few days of each other, has been confirmed by the subsequent 5% climb so far in October. The index is now 6% above its 50-day moving average, 10% above the 100-day MA, and 11% higher than the 200-day MA.



Source: Bloomberg

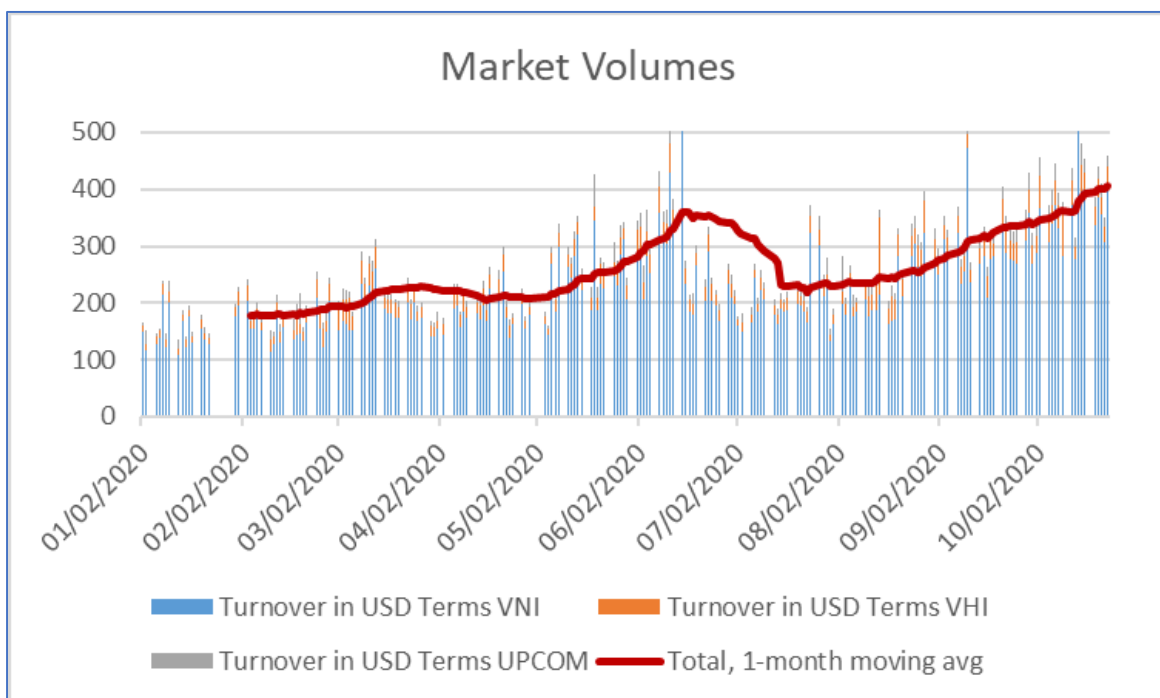
**Remember this day: The 200-day moving average ticked higher on October 23 after an 11-month decline.** The chart above looks solid in terms of basic technical analysis in all aspects except for what appears to be a steadily declining 200-day moving average line. However, it gives us great pleasure to report that the 200-day MA ticked higher on October 23 for the first time since November 29, 2019.



Source: Bloomberg, Yuanta Vietnam

**Average daily turnover declined by 13% WoW, but it still remains elevated at US\$410** driven by frenetic retail investor trading. In our view, this has been driven primarily by reduced bank deposit rates (we view state bank deposit rates as the de-facto risk free rate for domestic investors in Vietnam). Vietnamese investors have few alternative assets. Our sense is that property speculators have become cautious, which is not surprising given the large size of such investments and concerns about secondary market liquidity amid the myriad uncertainties that 2020 has thrown at the property market. Meanwhile, gold prices have been subdued since August and stock prices have been soaring...

We continue to view this as a positive indicator of liquidity conditions and a continuation of the bull market heading into 1Q21. Our yearend VN Index target of 1000 points is now just 4% higher than the Oct 23 close.



Source: FiinPro, Bloomberg

**Where's the consolidation?** We had anticipated a round of "selling the news" to accompany the inundation of 3Q20 results that began last week and that will continue through to the end of October. However, this has not emerged in any broad sense across sectors. We still believe that a moderate c.5% correction in the VNI is likely to occur in the short term given the ephemeral nature of retail investor positions (and retailers, not institutions, have been the key drivers of this market). Nevertheless, we remain positive for the medium term outlook and are more convinced than ever that our yearend VNI target of 1000 points is probably too low.

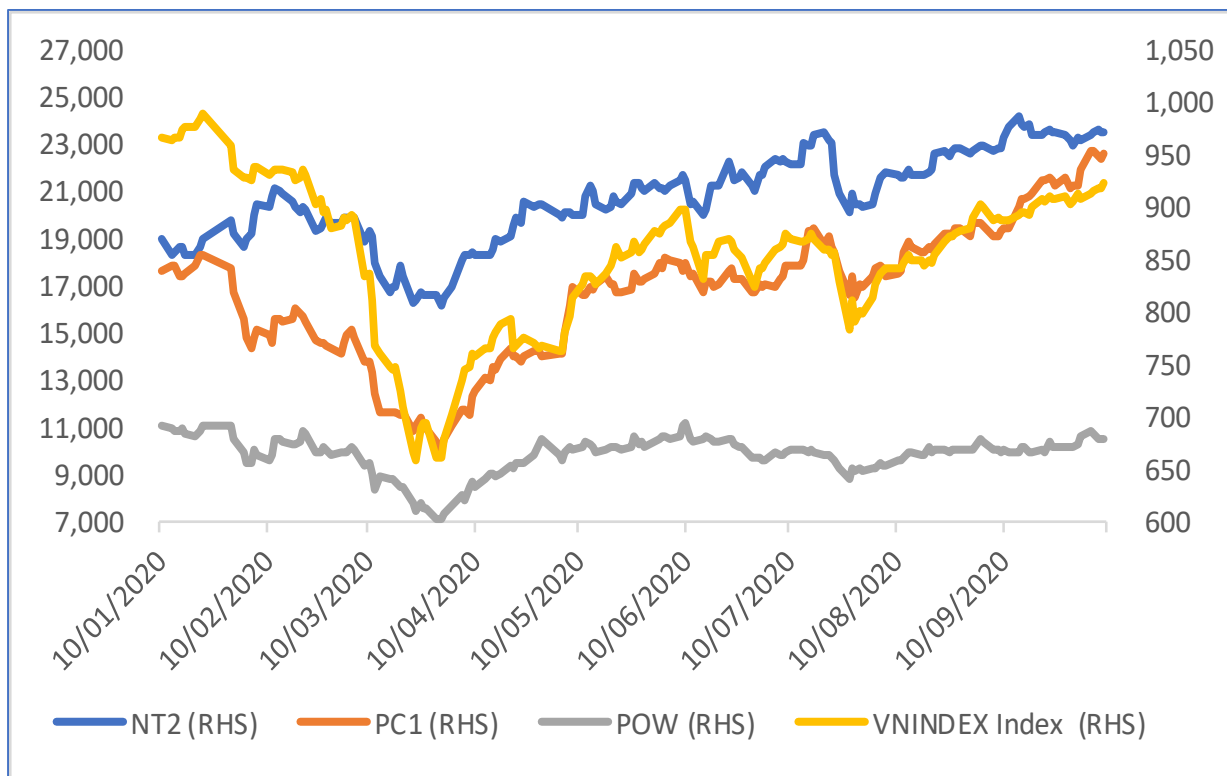
## Spare a moment to consider the beleaguered energy stocks

As defined by Bloomberg, the energy sector has declined by -19% YTD, making it the worst performing sector in Vietnam. This weak share price performance is understandable given the various issues confronting the sector, including declining demand but also the specific gas input shortage for the energy suppliers. PC1 (BUY) is analyst Binh Truong's top fundamental pick given its new capacity coming online, which should continue to bolster earnings going forward. However, PC1 has already outperformed.

**Every dog has its day.** At this point, we see greater upside to our target price for POW (BUY), which posted weak 3Q20 preliminary results that won't improve much in 4Q20. However, our argument has been that [POW should turn around in](#)

2021 given 1) a recovery in energy demand and 2) at least partial alleviation of the gas supply constraints confronting thermal energy producers.

### Yuanta Vietnam Energy Sector Universe Share Prices

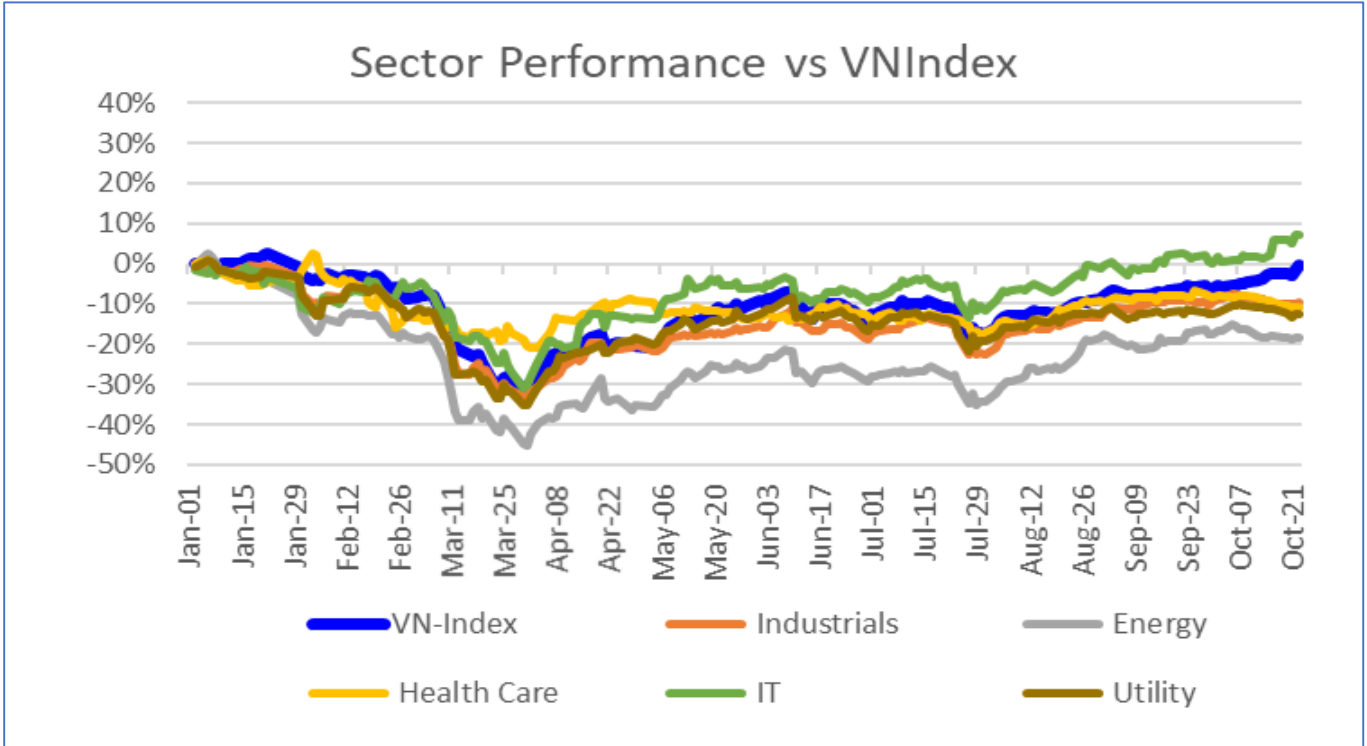


Source: Bloomberg

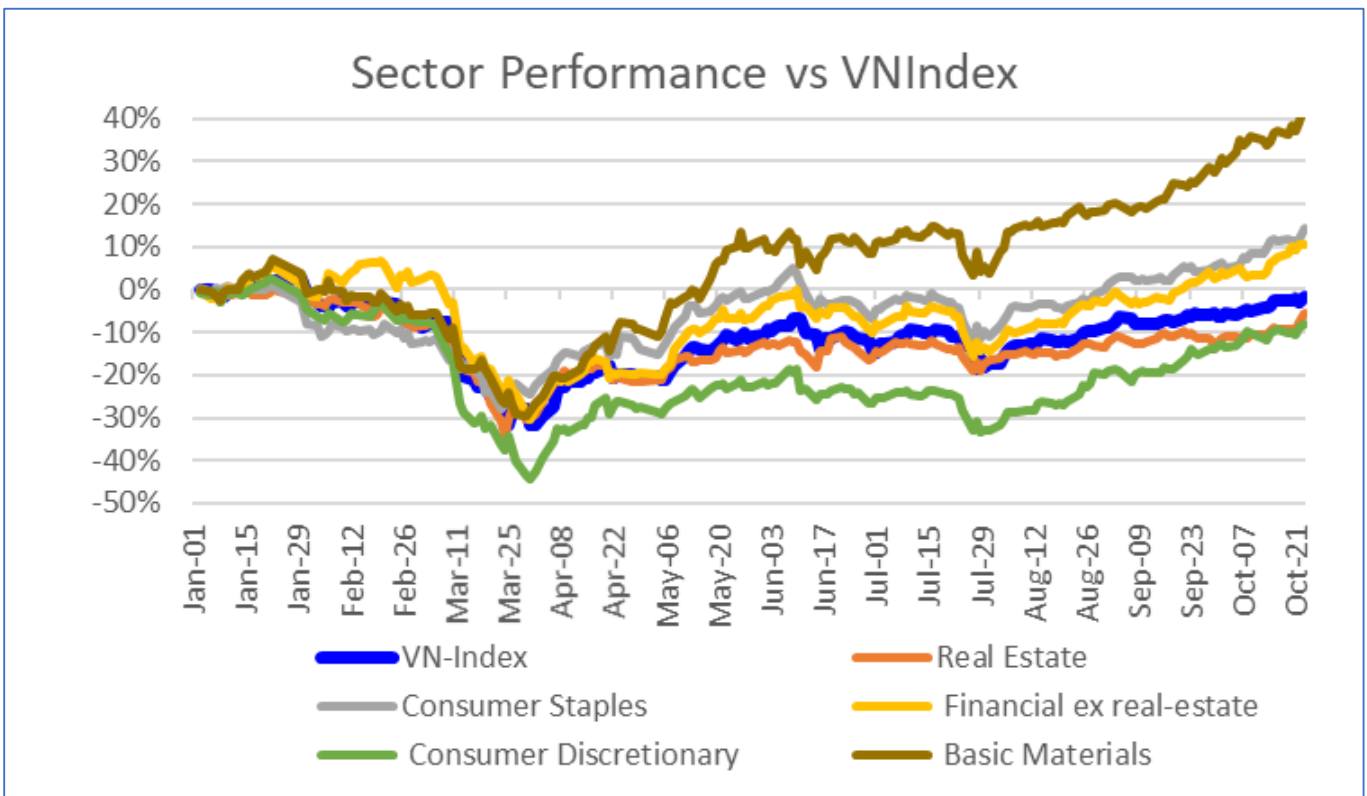
To the latter point, management at GAS (Not Rated) disclosed in their [3Q20 analyst meeting](#) on Oct 21 that they expect the new Sao Vang Dai Nguyet (SVDN) gas field to be operational starting from next month (i.e., November 2020). This is sooner than our previous assumption that it would come online in 1Q21. The project should supply 5 mn m3 of gas per day and thus stabilize gas supply for electricity generation in the South.

GAS's disclosure bolsters our confidence in POW because it should help alleviate the gas input supply issue for thermal energy producers more rapidly than we had expected. We see 30% 12-m total returns for POW.

**Energy has been the worst performer YTD**

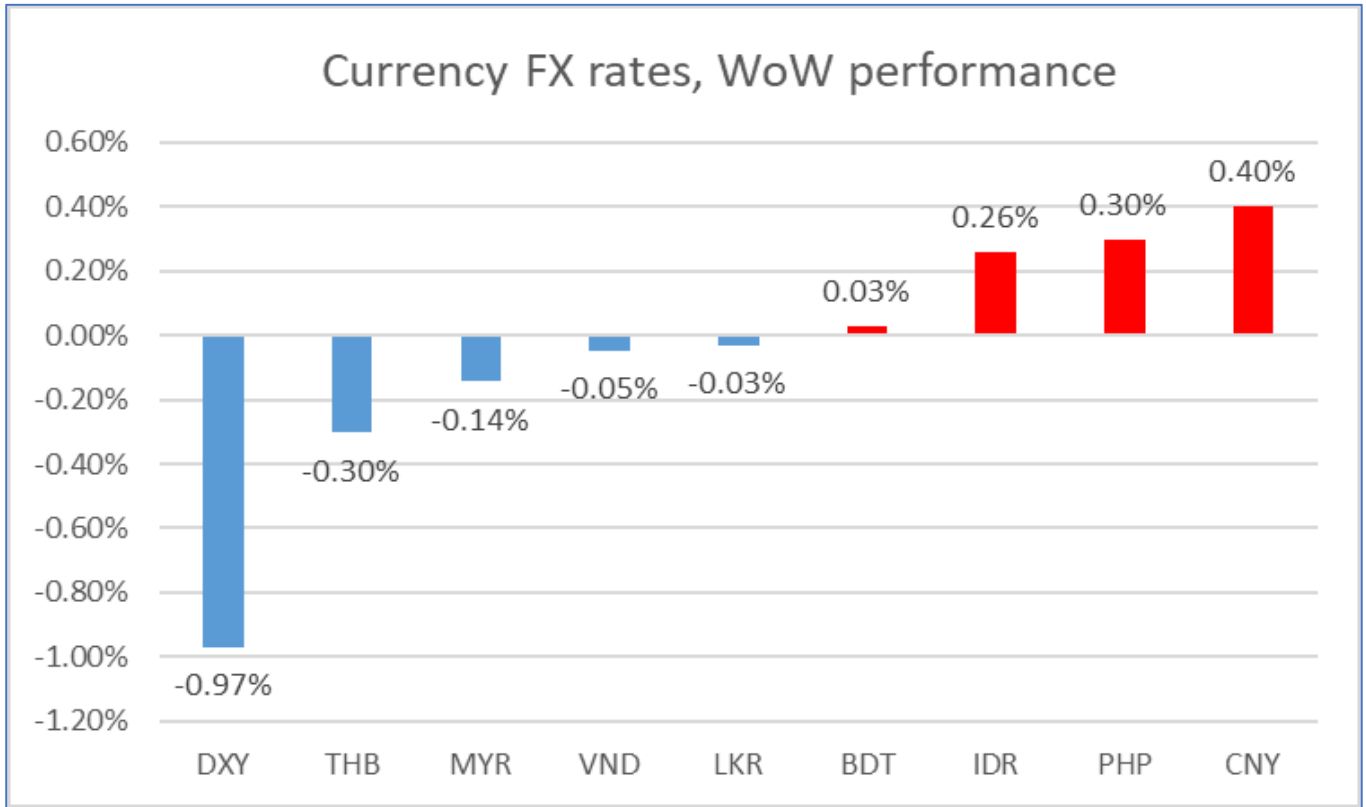


**Basic materials sector continues to soar**



Source: Bloomberg

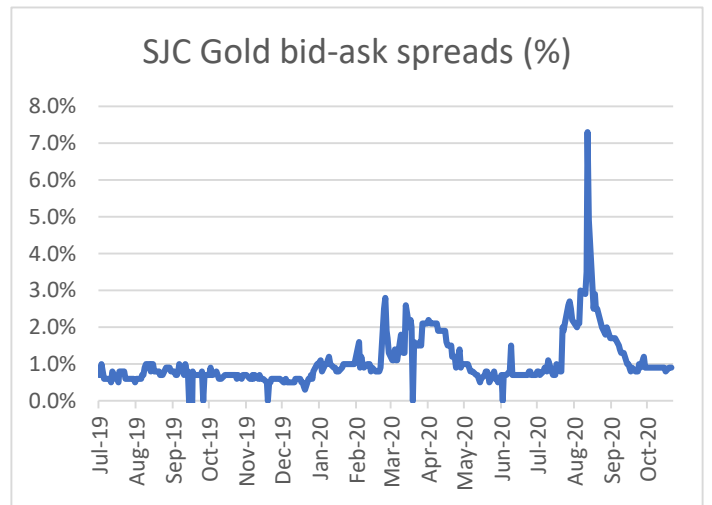
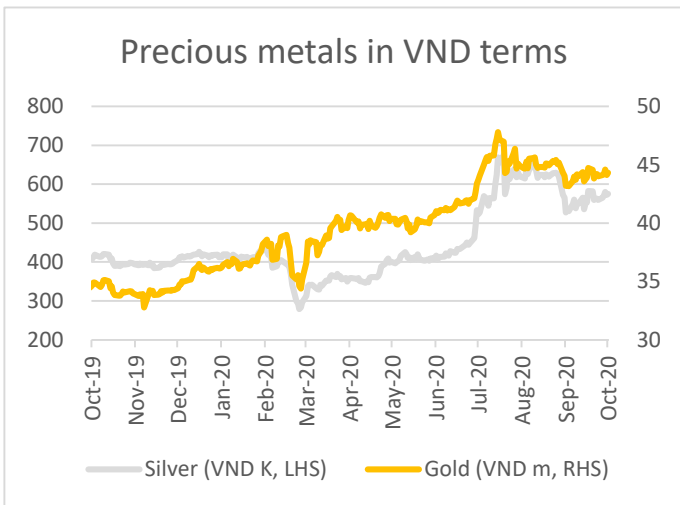
**Regional currencies: VND (-5bp WoW) remained steady against the declining US dollar**



Source: Bloomberg

**Gold remains subdued, and is likely to remain that way ahead of a US decision on stimulus.**

**This may have boosted inflows into Vietnamese stocks, as investors have few other options.**



Source: Bloomberg, Yuanta Vietnam. This data represents XAUVND and XAGVND and is not an on-the-ground price.

Source: FiinPro, Yuanta Vietnam  
Note: The Aug 12 bid-ask spread was highest since Feb 2015.

**Yuanta Universe: Valuations and ratings**

Sector	Stock Code	PER (x)			EPS Growth (%)			PEG (x)			PBV (x)			ROE (%)			ROA (%)		
		2019A	2020E	2021E	2019A	2020E	2021E	2019A	2020E	2021E	2019A	2020E	2021E	2019A	2020E	2021E	2019A	2020E	2021E
<b>Banks</b>	ACB VN	7.0	8.7	6.8	18.1	(19.0)	28.2	0.4	n/a	0.2	1.5	1.4	1.2	24.2	18.6	19.2	1.7	1.5	1.8
	BID VN	24.0	20.6	17.0	9.1	16.5	21.4	2.6	1.3	0.8	2.2	2.1	2.0	10.5	10.9	12.4	0.5	0.5	0.6
	HDB VN	7.6	7.2	7.0	10.5	5.8	2.6	0.7	1.2	2.7	1.5	1.7	1.5	19.4	22.5	23.2	1.5	1.6	1.7
	MBB VN	5.4	5.5	5.1	44.3	(2.4)	8.7	0.1	n/a	0.6	1.2	1.1	0.9	21.1	19.0	18.5	2.0	2.0	2.0
	STB VN	13.0	13.3	9.9	43.3	(2.3)	33.8	0.3	n/a	0.3	1.0	0.9	0.8	7.9	7.1	8.8	0.5	0.4	0.5
	VCB VN	19.5	19.3	15.6	34.8	1.3	23.6	0.6	14.7	0.7	4.0	3.3	2.9	23.2	18.9	19.7	1.4	1.3	1.5
	VPB VN	7.6	8.8	6.9	11.6	(13.9)	28.8	0.7	n/a	0.2	1.5	1.3	1.1	21.5	15.5	17.0	2.4	1.8	2.1
<b>Brokers</b>	HCM VN	15.1	15.1	9.4	(49.0)	(0.3)	61.2	n/a	n/a	0.2	1.5	1.5	1.4	11.7	11.0	17.1	6.2	5.9	8.8
	SSI VN	11.6	12.7	9.1	(32.5)	(8.0)	39.4	n/a	n/a	0.2	1.1	1.0	1.0	9.8	8.7	11.4	3.6	2.9	3.5
	VCI VN	9.2	13.7	10.7	(16.3)	(32.6)	28.4	n/a	n/a	0.4	1.6	1.4	1.3	18.0	11.1	13.0	9.9	5.9	6.8
	VND VN	9.2	14.4	9.0	(4.3)	(36.1)	59.5	n/a	n/a	0.2	1.0	1.0	0.9	12.3	7.4	11.2	3.3	1.9	2.7
<b>Energy</b>	PVD VN	25.4	95.6	(113.0)	(4.0)	(73.4)	(184.6)	n/a	n/a	n/a	0.3	0.3	0.3	17.1	0.4	(0.3)	0.9	0.2	(0.2)
	NT2 VN	8.8	9.4	8.8	(2.7)	(6.6)	7.2	n/a	n/a	1.2	1.6	1.7	1.7	19.3	7.4	19.7	9.2	9.9	11.7
	PC1 VN	10.1	6.6	7.2	(32.1)	52.4	(7.7)	n/a	0.1	n/a	1.0	0.9	0.8	10.2	14.4	11.8	4.8	6.6	5.6
<b>Consumer</b>	MSN VN	18.0	19.9	16.2	4.8	(9.6)	22.9	3.8	n/a	0.7	2.9	2.5	2.2	17.3	13.5	14.5	8.4	7.0	8.0
	PNJ VN	14.8	11.9	9.7	(13.6)	24.4	22.4	n/a	0.5	0.4	2.5	2.0	1.6	27.5	27.9	27.7	17.8	16.9	18.1
	DGW VN	15.6	12.6	11.6	24.5	23.3	8.5	0.6	0.5	1.4	2.5	2.3	2.0	17.1	18.9	18.4	6.1	7.1	7.1
<b>Oil &amp; GAS</b>	POW VN	12.2	10.7	10.0	(18.0)	14.1	7.5	n/a	0.8	1.3	0.7	0.7	0.7	6.8	7.4	7.6	3.9	4.5	4.5
<b>Property</b>	NLG VN	10.8	7.0	6.5	(29.6)	54.4	7.6	n/a	0.1	0.9	1.2	1.1	1.0	12.9	16.9	16.4	6.7	10.0	11.0
	NVL VN	23.6	19.1	17.9	(23.3)	23.8	6.6	n/a	0.8	2.7	2.9	2.9	2.9	10.2	11.2	11.1	3.1	3.4	3.3
	KDH VN	16.5	12.0	10.9	(15.8)	37.0	10.6	n/a	0.3	1.0	1.7	1.6	1.4	11.9	14.5	14.2	7.5	8.9	9.4
	VHM VN	14.5	11.4	8.5	20.4	27.1	33.5	0.7	0.4	0.3	1.2	0.9	0.7	30.0	28.7	28.5	11.6	11.9	12.7
<b>Transportation</b>	ACV VN	22.4	20.6	16.0	5.0	8.3	28.8	4.5	2.5	0.6	3.9	3.3	2.8	20.7	18.8	20.2	12.1	11.4	11.3

Stock ratings and pricing data is as of close on October 23, 2020.

Source: Bloomberg, Yuanta Vietnam





## Appendix A: Important Disclosures

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Yuanta Securities Korea  
Hanshin Mutual Savings

**Taiwan**  
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Yuanta Bank  
Yuanta Life

**Philippines**  
Yuanta Saving Bank

**Indonesia**  
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