

VINACAPITAL 2026 INVESTOR CONFERENCE EXAMINES VIETNAM'S SHIFT FROM FRONTIER OPPORTUNITY TO CORE ASIA ALLOCATION

Ho Chi Minh City, 13 October 2026 – VinaCapital Group (“VinaCapital”), one of Vietnam’s leading investment management companies, kicked off its 2026 Investor Conference at the Park Hyatt Saigon this morning, with more than 140 guests in attendance.

Under the theme “*Vietnam: From Frontier Opportunity to Core Asia Allocation*,” the conference examines opportunities across Vietnam’s major asset classes as the country enters a new phase of market development. The reclassification of Vietnam’s equity market to Secondary Emerging Market by FTSE Russell took effect on 21 September 2026, increasing its visibility and accessibility among international investors. In the coming years, expected ongoing market reforms, such as a potential upgrade by MSCI to Emerging Market status and an investment-grade sovereign credit rating, should prompt even greater attention to Southeast Asia’s most dynamic economy.

Russell Napier, a renowned macro strategist and author of *Anatomy of the Bear*, delivered the opening keynote address. Known for his insights on global capital flows and long-term market cycles, Professor Napier provided a global-macro perspective on where Vietnam fits in the next allocation cycle for international investors.

Don Lam, CEO and Founding Partner of VinaCapital Group, stated: “Vietnam is not immune to global headwinds. But once again, its resilience stands out. Its economy is growing, supported by strong high-tech exports and major infrastructure investment. Its upgrade to FTSE Russell Emerging Market status is an important milestone. With favourable demographics and considerable room for further industrialisation, urbanization, and productivity growth, Vietnam’s long-term investment potential remains significant. The question is no longer whether Vietnam deserves investors’ attention, but whether it deserves a permanent place in the portfolio, not at the edge of the allocation, but at its core.”

This year’s conference features a series of one-on-one and panel discussions around the following themes:

- Public Markets: Beyond the FTSE Upgrade
- Private Markets Dialogues regarding the overall landscape, venture capital, growth equity, and pre-IPO/IPO opportunities
- AI Infrastructure and Renewable Energy Keynote Address
- The New Cycle of Vietnam’s Real Estate Market
- Climate Impact Investment in Vietnam
- The Banking Sector and the Consumer Sector
- Financing Vietnam’s Infrastructure Supercycle and the Role of the Vietnam International Financial Center

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Investors and business leaders from a diverse range of local and international organizations across private capital, financial services, technology, infrastructure, energy, real estate, consumer goods, and sustainable investment will participate in discussions led by VinaCapital's senior investment professionals.

VinaCapital has been a leading investor in Vietnamese companies for more than 20 years, providing long-term growth capital that enables companies to invest in their operations and acquire new technology and equipment. The company held its first investor conference in 2005 to introduce Vietnam to foreign investors and promote investment opportunities in the country. Since then, VinaCapital has grown to become one of Vietnam's most diversified asset management companies, with a wide range of investment products and platforms for international and Vietnamese investors alike. As Vietnam enters a new phase of market development, VinaCapital remains committed to connecting global capital with the opportunities that will shape the country's next chapter of growth./.

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About VinaCapital Group

Founded in 2003, VinaCapital is a leading investment management firm headquartered in Vietnam, with a diversified portfolio of nearly USD4 billion in assets under management. VinaCapital invests across all asset classes in Vietnam, managing a closed-end fund listed on the London Stock Exchange as well as several open-ended funds for international and local investors that are distributed through a variety of channels. VinaCapital was awarded "Best Fund House – Vietnam" in 2018-2020 and 2023-2026 by Asia Asset Management magazine. The company also has partnerships with a number of international investors in hospitality, venture capital, and energy.

As a responsible corporate citizen, VinaCapital prioritizes investments in companies contributing to Vietnam's sustainable growth. VinaCapital is a founding member of the Institute for Circular Economy Development (ICED) to promote and drive initiatives on the environment and economic development. More information about VinaCapital may be found at <https://vinacapital.com/>.

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