

關注個股 VCS

2019/5/29

建議個股

VICOSTONE 股份公司

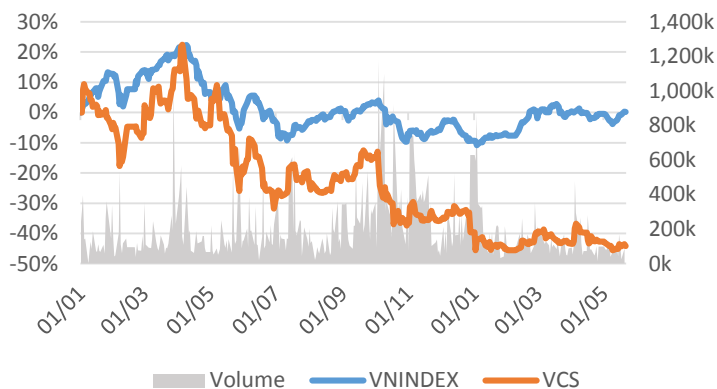
收盤價 64,800

VICOSTONE 股份公司

交易所: HOSE - 行業板塊: 建築和材料

個股資料

市值:	10,161	十億 VND
流通股數:	156,800,000	股
上市日期:	17/12/2007	
國家持有:	0%	
外資持有:	2%	
EPS 基本:	7,332	VND
P/E (TTM):	8.8x	
P/B (TTM):	3.4x	
ROE (%):	42%	
ROA (%):	27%	
股息比率:	0%	



技術分析

短期阻力關卡:	60.7
短期支撐關卡:	61.8
短期趨勢 (5-10 天):	上漲
中期阻力關卡:	77.3
中期支撐關卡:	60.8
中期趨勢 (1-3 月):	下跌

	2016 年	2017 年	2018 年
營收增長	23%	36%	4%
稅後利潤增長	67%	66%	0%
毛利率	31%	29%	33%
淨利率	21%	26%	25%
EPS 基本	10,813	13,461	6,548
P/E	5.9x	4.9x	9.2x

同行業公司比較

同行業公司總數: 10

股票編號	市值 (十億 VND)	交易所	毛利 %	D/E	P/E	P/B
VCS	10,161	HNX	33.1%	24.8%	8.8x	3.4x
CVT	708	HOSE	20.1%	11.6%	4.3x	1.1x
VIT	281	HNX	11.4%	3.5%	5.1x	1.0x
TLT	87	UPCOM	10.9%	2.8%	5.6x	1.2x
TCR	80	HOSE	10.8%	-8.1%	-0.6x	0.2x
產業平均			30.8%	22.6%	9.5x	3.1x

VCS – 短期趨勢更明確

- 價格趨勢圖超越 20 日均線，交易量大幅增加至 20 日均線之上。同時，價格走勢圖顯示進入積極強勢波動期的跡象，表明短期趨勢更明確。
- 短期趨勢從下跌轉為上漲。因此，我們建議投資者考慮以當前價位買入。
- 原目標價為 77,300 越盾，停損位為 61,800 越盾。
- 最佳放款支付比率：42.77%



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VCS 股票的價格走勢圖



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Ratings Definitions

BUY: We have a positive outlook on the stock based on our expected absolute or relative return over the investment period. Our thesis is based on our analysis of the company's outlook, financial performance, catalysts, valuation and risk profile. We recommend investors add to their position.

HOLD-Outperform: In our view, the stock's fundamentals are relatively more attractive than peers at the current price. Our thesis is based on our analysis of the company's outlook, financial performance, catalysts, valuation and risk profile.

HOLD-Underperform: In our view, the stock's fundamentals are relatively less attractive than peers at the current price. Our thesis is based on our analysis of the company's outlook, financial performance, catalysts, valuation and risk profile.

SELL: We have a negative outlook on the stock based on our expected absolute or relative return over the investment period. Our thesis is based on our analysis of the company's outlook, financial performance, catalysts, valuation and risk profile. We recommend investors reduce their position.

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