

關注個股 BID

2019/6/05

建議個股

BIDV 越南投資與發展商業股份銀行

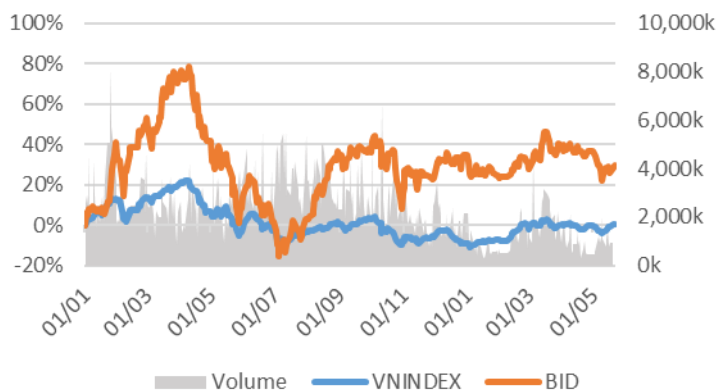
收盤價 32,000

BIDV 越南投資與發展商業股份銀行

交易所: HOSE - 行業板塊: 銀行

個股資料

市值:	104,613	十億 VND
流通股數:	3,418,715,334	股
上市日期:	24/01/2014	
國家持有:	95%	
外資持有:	3%	
EPS 基本:	2,150	VND
P/E (TTM):	14.2x	
P/B (TTM):	2.0x	
ROE (%):	13%	
ROA (%):	1%	
股息比率:	0%	



技術分析

短期阻力關卡:
短期支撐關卡:
短期趨勢 (5-10 天):
中期阻力關卡:
中期支撐關卡:
中期趨勢 (1-3 月):

	2016 年	2017 年	2018 年
營收增長	28%	26%	15%
稅後利潤增長	-2%	12%	9%
毛利率	7%	7%	7%
淨利率	5%	5%	5%
EPS 基本	1,354	1,499	-
P/E	24.4x	22.7x	15.4x

同行業公司比較

同行業公司總數: 16

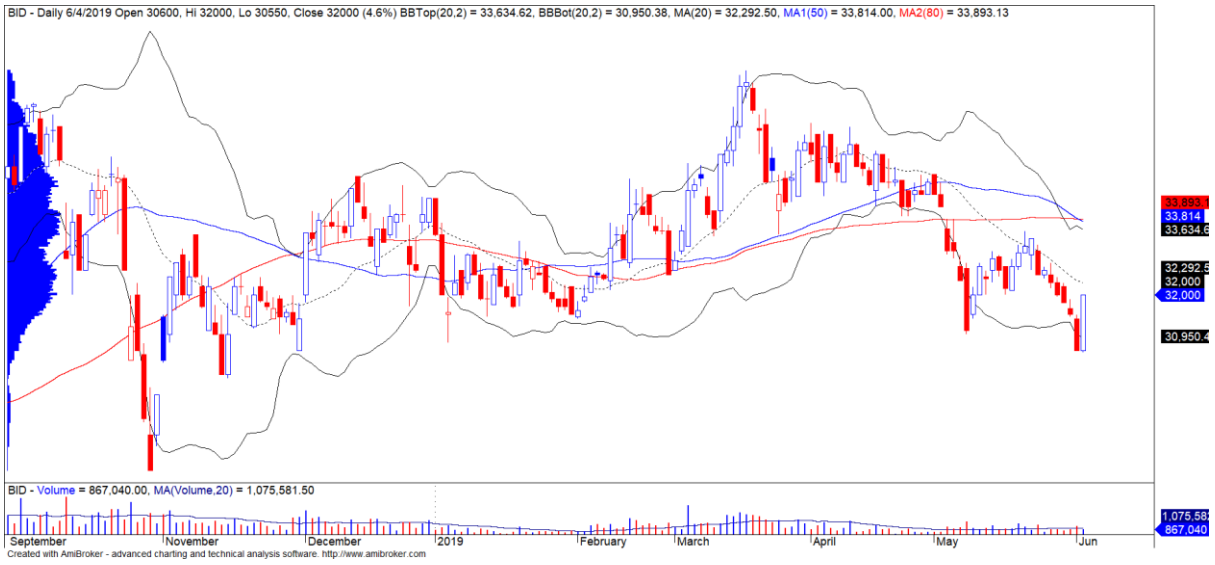
股票編號	市值 (十億 VND)	交易所	毛利 %	D/E	P/E	P/B
BID	104,613	HOSE	63.8%	16.5%	14.2x	2.0x
VCB	246,640	HOSE	65.4%	37.3%	15.2x	3.4x
TCB	75,177	HOSE	68.2%	46.1%	8.8x	1.4x
CTG	74,096	HOSE	50.4%	18.9%	13.4x	1.1x
VPB	44,221	HOSE	65.8%	23.7%	6.6x	1.2x
產業平均			58.0%	29.4%	13.2x	2.1x

BID – 短期風險有逐補降低的趨勢

- BID 的價格線圖飆升近 5%，價格線圖接近 20 日均線，但交易量仍偏低。
- 短期風險趨於下降，價格線圖有信號顯示進入累積期。同時，根據價格模型，我們估計下跌趨勢已有減弱的跡象，並有可能會很快結束，因此短線投資者可關注這支股。
- 短期趨勢仍維持下跌，系統阻力區位於 32,440 越盾



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BID 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.

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Restricted: The rating and target price have been suspended temporarily to comply with applicable regulations and/or Yuanta policies.

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