

關注個股 VCG

2019/6/18

建議個股

VINACONEX 越南建築及進出口總公司股份公司

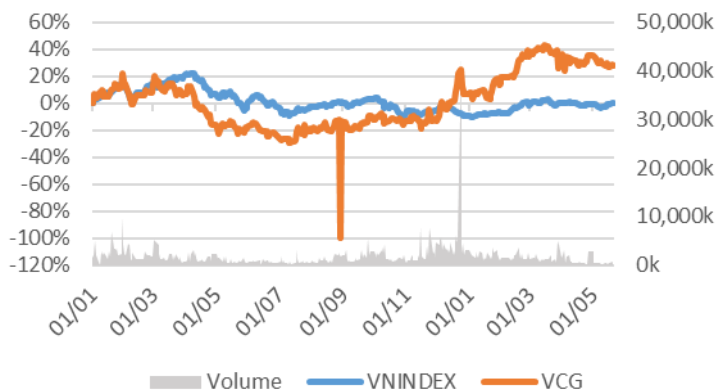
收盤價 28,100

VINACONEX 越南建築及進出口總公司股份公司

交易所: HOSE - 行業板塊: 建築和材料

個股資料

| | | |
|------------|-------------|--------|
| 市值: | 11,705 | 十億 VND |
| 流通股數: | 441,710,673 | 股 |
| 上市日期: | 05/09/2008 | |
| 國家持有: | 0% | |
| 外資持有: | 0% | |
| EPS 基本: | 1,213 | VND |
| P/E (TTM): | 21.8x | |
| P/B (TTM): | 1.8x | |
| ROE (%): | 7% | |
| ROA (%): | 3% | |
| 股息比率: | 0% | |



技術分析

| | |
|----------------|-------|
| 短期阻力關卡: | 29.15 |
| 短期支撐關卡: | 25.60 |
| 短期趨勢 (5-10 天): | 上漲 |
| 中期阻力關卡: | 33.40 |
| 中期支撐關卡: | 23.90 |
| 中期趨勢 (1-3 月): | 上漲 |

| | 2016 年 | 2017 年 | 2018 年 |
|--------|--------|--------|--------|
| 營收增長 | 7% | 27% | -11% |
| 稅後利潤增長 | 36% | 129% | -61% |
| 毛利率 | 17% | 16% | 13% |
| 淨利率 | 8% | 15% | 7% |
| EPS 基本 | 1,131 | 3,037 | 1,122 |
| P/E | 23.0x | 8.5x | 22.4x |

同行業公司比較

同行業公司總數: 262

| 股票編號 | 市值 (十億 VND) | 交易所 | 毛利 % | D/E | P/E | P/B |
|------|----------------|-------|-------|-------|-------|------|
| VCG | 11,705 | HNX | 12.5% | 6.5% | 21.8x | 1.8x |
| ROS | 17,425 | HOSE | 6.6% | 5.3% | 93.8x | 3.0x |
| SNZ | 8,845 | UPCOM | 30.9% | 18.4% | 18.9x | 1.9x |
| CTD | 7,814 | HOSE | 6.4% | 5.3% | 5.6x | 1.0x |
| DTK | 7,616 | UPCOM | 14.8% | 3.5% | 21.0x | 1.0x |
| 產業平均 | | | 15.8% | 7.3% | 27.5x | 1.5x |

VCG – 增長處於高位

- VCG 的股票評級 Stock Rating 為 83 點，其中 90 點的增長率表明該股票適合衝浪的投資者。
- 價格線圖顯示出有脫離累積期並進入積極強烈波動期的跡象。同時，短期趨勢也從下跌轉為上漲。因此，當一般市場仍處於下跌趨勢時，我們建議短線投資者可考慮在當前價格範圍內以低於 30% 的比例買入。



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- 短期目標位：33,400 越盾（預期回報率為 19%）
- 停損位：25,600 越盾



VCG 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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