

關注個股 PVD

2019/6/26

建議個股

鑽油氣業務股份公司 (PV DRILLING)

收盤價 19,200

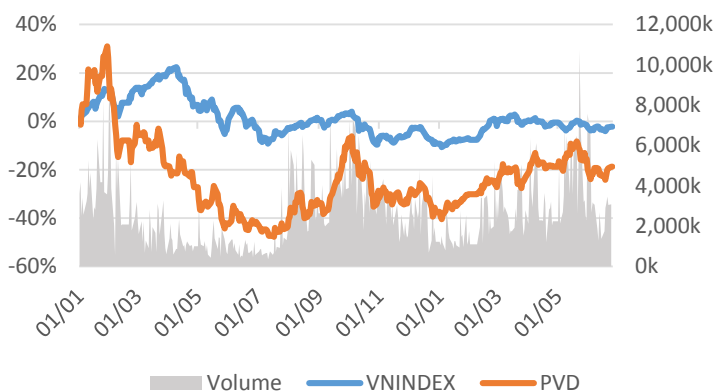
鑽油氣業務股份公司 (PV DRILLING)

交易所：HOSE

行業板塊：油氣設備、服務和分銷

個股資料

| | | |
|------------|-------------|--------|
| 市值： | 7,217 | 十億 VND |
| 流通股數： | 382,850,160 | 股 |
| 上市日期： | 05/12/2006 | |
| 國家持有： | 50% | |
| 外資持有： | 21% | |
| EPS 基本： | 895 | VND |
| P/E (TTM)： | 21.1x | |
| P/B (TTM)： | 0.5x | |
| ROE (%)： | 3% | |
| ROA (%)： | 2% | |
| 股息比率： | 0% | |



技術分析

| | |
|----------------|-------|
| 短期阻力關卡： | 20.30 |
| 短期支撐關卡： | 18.12 |
| 短期趨勢 (5-10 天)： | 上漲 |
| 中期阻力關卡： | 21.99 |
| 中期支撐關卡： | 17.78 |
| 中期趨勢 (1-3 月)： | 上漲 |

| | 2016 年 | 2017 年 | 2018 年 |
|--------|--------|--------|--------|
| 營收增長 | -63% | -27% | 41% |
| 稅後利潤增長 | -89% | -81% | 359% |
| 毛利率 | 16% | 5% | 7% |
| 淨利率 | 3% | 1% | 3% |
| EPS 基本 | 224 | 74 | 369 |
| P/E | 50.5x | 144.3x | 34.8x |

同行業公司比較

同行業公司總數：6

| 股票編號 | 市值 (十億 VND) | 交易所 | 毛利 % | D/E | P/E | P/B |
|------|----------------|-------|-------|-------|--------|------|
| PVD | 7,217 | HOSE | 7.2% | 3.0% | 21.1x | 0.5x |
| PVS | 11,089 | HNX | 7.4% | 3.7% | 9.6x | 0.9x |
| PVB | 417 | HNX | 22.2% | 11.4% | -58.6x | 1.0x |
| PVC | 345 | HNX | 7.9% | 0.5% | 16.3x | 0.4x |
| POS | 336 | UPCOM | 4.6% | 1.2% | 22.6x | 0.4x |
| 產業平均 | | | 7.5% | 3.5% | 12.6x | 0.8x |

PVD –

- PVD 的股票評級 Stock Rating 為 82 點，表明中線投資者可繼續買入和持倉。
- PVD 的價格線圖超越 19,000 越盾，交易量增加，表明短期現金流已有改善。同時，價格線圖陷入累積狀態，因此，短線投資者可關注調整期間累積該股票。此外，短期趨勢已從下跌轉為上漲。因此，我們建議短線投資者可考慮在當前價格區間買入。
- 短期目標位：21,990 越盾（預期回報率為 15%）
- 停損位：18,120 越盾



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PVD 股票的價格走勢圖

(*) 股票評級 **Stock Rating** 是企業股票價格基本增長與相對強弱與越南股市三大證交所剩餘股票相比的相關性比較。



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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.

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