

關注個股 **BMP, DIG**

2019/9/17

建議個股

BINH MINH (平明) 塑料股份公司

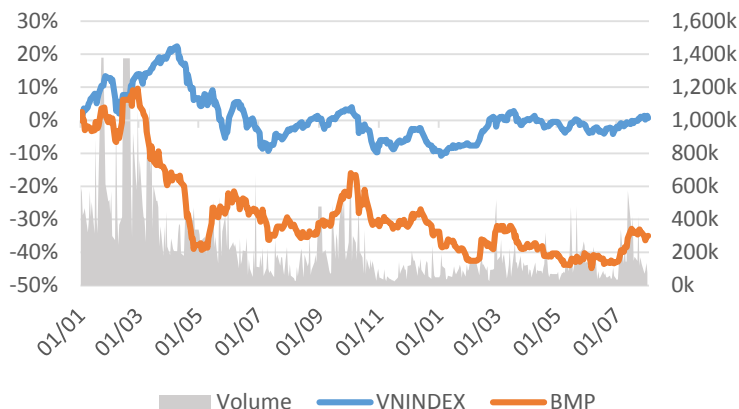
收盤價 51,800

BINH MINH (平明) 塑料股份公司

交易所: HOSE - 行業板塊: 建築和材料

個股資料

市值:	4,109	十億 VND
流通股數:	81,860,938	股
上市日期:	11/07/2006	
國家持有:	0%	
外資持有:	78%	
EPS 基本:	5,022	VND
P/E (TTM):	10.0x	
P/B (TTM):	1.7x	
ROE (%):	17%	
ROA (%):	15%	
股息比率:	0%	



技術分析

短期阻力關卡:	53.00
短期支撐關卡:	48.82
短期趨勢 (5-10 天):	上漲
中期阻力關卡:	60.49
中期支撐關卡:	45.44
中期趨勢 (1-3 月):	上漲

	2016 年	2017 年	2018 年
營收增長	24%	10%	2%
稅後利潤增長	21%	-26%	-8%
毛利率	32%	24%	22%
淨利率	19%	12%	11%
EPS 基本	13,796	5,677	5,229
P/E	4.0x	9.8x	9.7x

同行業公司比較

同行業公司總數: 19

股票編號	市值 (十億 VND)	交易所	毛利 %	D/E	P/E	P/B
BMP	4,109	HOSE	22.2%	10.9%	10.0x	1.7x
NTP	3,382	HNX	29.4%	7.3%	8.4x	1.4x
DNP	1,520	HNX	16.3%	0.6%	65.5x	1.3x
FIC	1,270	UPCOM	14.4%	3.1%	18.8x	0.8x
TTB	1,114	HOSE	9.0%	7.0%	38.4x	2.1x
產業平均			20.1%	6.5%	20.8x	1.5x

BMP – 很快超越 53.0 水平

股票代碼	BMP
建議價格	51.80
目前價格	51.80
短期趨勢	上漲
中期趨勢	上漲
短期目標	60.49
與目前價格相比的短期上漲空間	16.78%
短期停損	48.82
Reward/Risk	2.92
預期持有 (盤)	20

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- BMP 的股票評級為 83 點，表明 BMP 處於可持續增長週期。同時，價格走勢圖有信號顯示進入積極強勢波動時期。53.0 水平為強勢阻力位，並且我們期待短期內價格線圖將很快超越該阻力區。
- 短期趨勢從下跌轉為上漲。因此，我們建議短線投資者可考慮在目前價格範圍內買入。



BMP 股票的價格走勢圖



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建築投資發展股份公司 (DIC CORP)

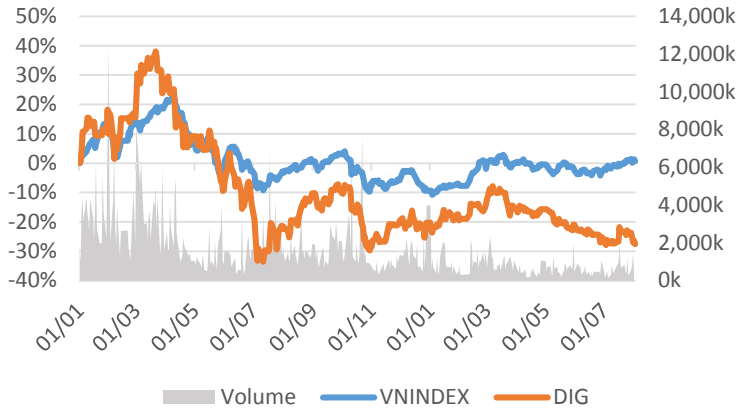
收盤價 14,250

建築投資發展股份公司 (DIC CORP)

交易所: HOSE - 行業板塊: 房地產

個股資料

市值:	4,425	十億 VND
流通股數:	314,943,601	股
上市日期:	19/08/2009	
國家持有:	0%	
外資持有:	36%	
EPS 基本:	1,003	VND
P/E (TTM):	14.0x	
P/B (TTM):	1.2x	
ROE (%):	9%	
ROA (%):	4%	
股息比率:	0%	



技術分析

短期阻力關卡:	14.95
短期支撐關卡:	13.34
短期趨勢 (5-10 天):	上漲
中期阻力關卡:	17.00
中期支撐關卡:	12.65
中期趨勢 (1-3 月):	上漲

	2016 年	2017 年	2018 年
營收增長	90%	30%	44%
稅後利潤增長	375%	208%	61%
毛利率	28%	25%	24%
淨利率	6%	13%	14%
EPS 基本	236	797	-
P/E	74.6x	21.0x	13.2x

同行業公司比較

同行業公司總數: 75

股票編號	市值 (十億 VND)	交易所	毛利 %	D/E	P/E	P/B
DIG	4,425	HOSE	24.3%	13.9%	14.0x	1.2x
VIC	409,542	HOSE	24.1%	4.9%	84.4x	5.1x
VHM	294,757	HOSE	25.1%	38.0%	18.4x	5.5x
NVL	57,924	HOSE	33.7%	21.4%	17.2x	2.9x
KDH	13,039	HOSE	42.7%	27.8%	16.3x	1.9x
產業平均			26.9%	21.1%	48.9x	4.7x

DIG - 價格走勢圖可能進入最強上漲週期

股票代碼	DIG
建議價格	14.25
目前價格	14.25
短期趨勢	上漲
中期趨勢	上漲
短期目標	17.00
與目前價格相比的短期上漲空間	19.32%
短期停損	13.34
Reward/Risk	3.01
預期持有 (盤)	21

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- DIG 的股票評級為 79 點，價格走勢圖有趨於進入累積期的跡象，因此，短線投資者只宜在調整期間考慮累計該股票。同時，根據目前的價格走勢，我們估計該股票在進入上漲週期內的最強上漲時期。
- 短期趨勢從下跌轉為上漲。因此，我們建議短線投資者可考慮在目前價格範圍內買入。



DIG 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交易市場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.

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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