

關注個股 IJC

2019/12/18

下層發展技術股份公司 (BECAMEX IJC)

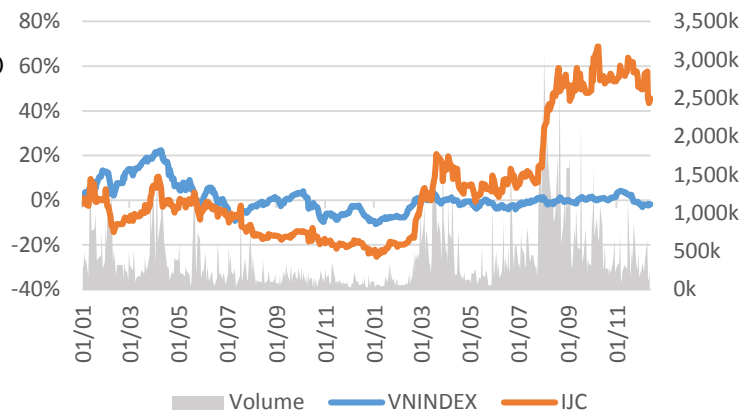
收盤價 14,650

下層發展技術股份公司 (BECAMEX IJC)

交易所: HOSE - 行業板塊: 房地產

個股資料

| | | |
|------------|-------------|--------|
| 市值: | 2,008 | 十億 VND |
| 流通股數: | 137,097,323 | 股 |
| 上市日期: | 19/04/2010 | |
| 國家持有: | 79% | |
| 外資持有: | 2% | |
| EPS 基本: | 2,070 | VND |
| P/E (TTM): | 7.1x | |
| P/B (TTM): | 1.1x | |
| ROE (%): | 16% | |
| ROA (%): | 4% | |
| 股息比率: | 0% | |



技術分析

| | |
|----------------|-------|
| 短期阻力關卡: | 15.00 |
| 短期支撐關卡: | 13.86 |
| 短期趨勢 (5-10 天): | 上漲 |
| 中期阻力關卡: | 17.38 |
| 中期支撐關卡: | 12.68 |
| 中期趨勢 (1-3 月): | 上漲 |

| | 2016 年 | 2017 年 | 2018 年 |
|--------|--------|--------|--------|
| 營收增長 | 190% | -51% | 33% |
| 稅後利潤增長 | 5% | 44% | 26% |
| 毛利率 | 18% | 44% | 38% |
| 淨利率 | 6% | 19% | 19% |
| EPS 基本 | 434 | 1,104 | 1,618 |
| P/E | 18.2x | 6.4x | 4.8x |

同行業公司比較

同行業公司總數: 9

| 股票編號 | 市值 (十億 VND) | 交易所 | 毛利 % | D/E | P/E | P/B |
|------|-------------|-------|-------|-------|-------|------|
| IJC | 2,008 | HOSE | 37.5% | 18.7% | 7.1x | 1.1x |
| LDG | 2,098 | HOSE | 50.2% | 35.1% | 3.1x | 0.7x |
| SID | 1,101 | UPCOM | 45.7% | 42.9% | 17.0x | 0.5x |
| CLX | 1,014 | UPCOM | 25.5% | 27.8% | 8.8x | 0.9x |
| TN1 | 831 | HOSE | 26.2% | 14.6% | 8.2x | 2.8x |
| 產業平均 | | | 32.8% | 23.5% | 9.4x | 1.2x |

IJC - 中期和長期前景不大

| 股票代碼 | IJC |
|----------------|--------|
| 建議價格 | 14.65 |
| 目前價格 | 14.65 |
| 短期趨勢 | 上漲 |
| 中期趨勢 | 上漲 |
| 短期目標 | 17.38 |
| 與目前價格相比的短期上漲空間 | 18.61% |
| 短期停損 | 13.86 |

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| | |
|-------------|------|
| Reward/Risk | 3.46 |
| 預期持有（盤） | 18 |
| 最佳分配比例 | 18% |

- IJC 的股票評級為 91 點，因此我們仍評估股票增長為正面。同時，2019 年第三季度末，IJC 已超過營收計劃的 15%，已完成稅後利潤計劃的 99%，因此在 2019 年超過稅後利潤目標的可能性非常高。
- 價格走勢圖仍高於 50 天移動平均線，並且面臨 15.0 的阻力位。價格圖也處於累積期，因此投資者不應追漲。
- 短期趨勢從“下跌”轉為“上漲”。因此，我們建議短期投資者在當前價格範圍內考慮買進。



IJC 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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