關注個股 CTR

2020/01/15

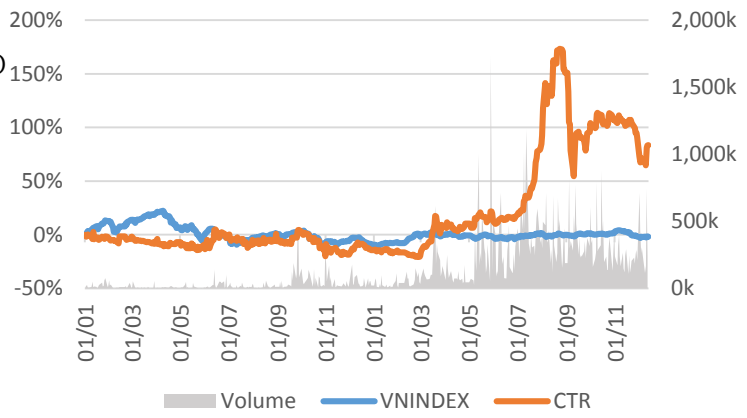
Viettel 工程股份公司

收盤價 44,000 Viettel 工程股份公司

交易所：UPCOM - 行業板塊：建設和材料

個股資料

市值 ：	2,597	十億 VND
流通股數 :	60,697,509	股
上市日期:	31/10/2017	
國家持有 :	67%	
外資持有 :	1%	
EPS 基本 :	2,735	VND
P/E (TTM):	15.6x	
P/B (TTM):	3.2x	
ROE (%):	21%	
ROA (%):	7%	
股息比率 :	0%	



技術分析

短期阻力關卡:	44.42
短期支撐關卡:	40.94
短期趨勢 (5-10 天):	上漲
中期阻力關卡:	51.81
中期支撐關卡:	35.7
中期趨勢 (1-3 月):	下跌

	2016 年	2017 年	2018 年
營收增長	10%	94%	32%
稅後利潤增長	-9%	11%	34%
毛利率	10%	6%	7%
淨利率	6%	3%	3%
EPS 基本	2,496	2,352	-
P/E	8.3x	8.2x	6.8x

同行業公司比較

同行業公司總數: 77

股票編號	市值 (十億 VND)	交易所	毛利 %	D/E	P/E	P/B
CTR	**2,597**	**UPCOM**	**6.8%**	**3.5%**	**15.6x**	**3.2x**
VCG	11,308	HNX	12.5%	6.5%	16.4x	1.7x
ROS	6,840	HOSE	6.6%	5.3%	40.3x	1.2x
DTK	6,120	UPCOM	14.8%	3.5%	8.6x	0.9x
CII	6,097	HOSE	28.4%	7.6%	12.9x	1.1x
產業平均			**16.5%**	**7.5%**	**43.2x**	**1.3x**

CTR – 進入劇烈變動階段

股票代碼	CTR
建議價格	44.00
目前價格	44.00
短期趨勢	上漲
中期趨勢	下跌
短期目標	70.41
與目前價格相比的短期上漲空間	*60.03%*
短期停損	40.94

Reward/Risk	8.63
預期持有（盤）	30
最佳分配比例	33%

- CTR 的股票評級為 85 點，表明該股票的中期增長為積極。
- 隨著流動性的改善，價格走勢圖急劇上漲至 50 天移動均線附近，價格走勢圖趨於進入積極的劇烈波動時期。同時，短期風險已大大降低。
- CTR 的短期趨勢從下跌轉為上漲。因此，我們建議短期投資者考慮以當前價格買進。

CTR 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。想了解其他上市公司的股票水平有關的更多信息，請按下以下鏈接：
http://stockrating.yuanta.com.vn/

短期建議列表

股碼	股價	短期趨勢	中期趨勢	建議買進日期	T+交易	短期買進價格	短期停損價格	%利潤	建議	短期風險評估
FPT	57.00	上漲	上漲	13/12/2019	T+23	57.00	56.51	0.00%	持有	*低風險*
MWG	113.90	上漲	下跌	13/12/2019	T+23	113.40	112.38	0.44%	持有	*低風險*
BID	50.10	上漲	上漲	16/12/2019	T+22	41.90	47.96	19.57%	持有	*低風險*
PNJ	88.90	上漲	上漲	24/12/2019	T+16	84.70	85.23	4.96%	持有	*低風險*
TCH	36.60	上漲	上漲	24/12/2019	T+16	30.05	33.47	21.80%	持有	*低風險*
DRC	24.90	上漲	上漲	3/1/2020	T+8	24.10	23.77	3.32%	持有	*低風險*
HPG	25.00	上漲	上漲	3/1/2020	T+8	24.00	23.29	4.17%	持有	*低風險*
REE	35.80	上漲	上漲	3/1/2020	T+8	36.95	35.52	-3.11%	持有	*低風險*
TDH	10.10	上漲	下跌	6/1/2020	T+7	10.50	10.03	-3.81%	持有	*低風險*
GAS	94.90	上漲	下跌	7/1/2020	T+6	97.80	94.48	-2.97%	持有	*低風險*
VHM	86.30	上漲	下跌	14/1/2020	T+1	86.30	81.86	0.00%	持有	*低風險*
CTR	44.00	上漲	下跌	15/1/2020	T+0	44.00	42.55	0.00%	買進	*低風險*

注：

- 高風險：當我們在此水平上進行評估時，投資者應將持股比例停利一半。
- 風險略有增加：投資者可以繼續持有
- 持有並停止購買
- 低風險：投資者可以繼續持有或繼續購買

中等建議清單

目前，我們仍然沒有新的建議。

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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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