關注個股 SCR

2020/02/05

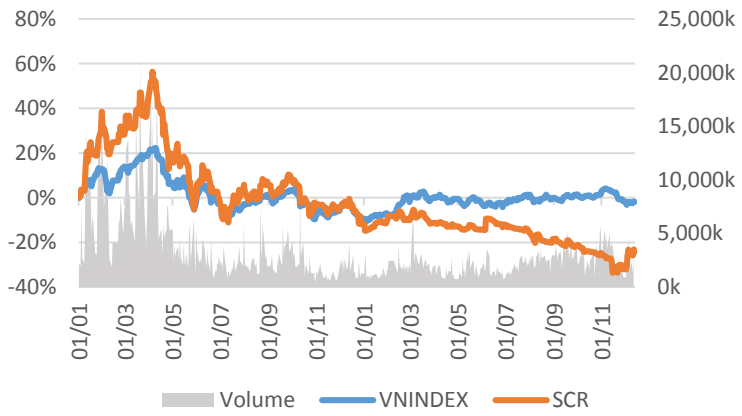
西貢商信房地產股份公司

收盤價 5,300 西貢商信房地產股份公司

交易所：HOSE - 行業板塊：房地產

個股資料

市值 ：	1,942	十億 VND
流通股數 :	366,356,303	股
上市日期:	18/11/2016	
國家持有 :	0%	
外資持有 :	2%	
EPS 基本 :	776	VND
P/E (TTM):	6.8x	
P/B (TTM):	0.4x	
ROE (%):	6%	
ROA (%):	3%	
股息比率 :	0%	



技術分析

短期阻力關卡:	5.50
短期支撐關卡:	4.67
短期趨勢 (5-10 天):	上漲
中期阻力關卡:	6.00
中期支撐關卡:	4.50
中期趨勢 (1-3 月):	下跌

	2016 年	2017 年	2018 年
營收增長	388%	138%	65%
稅後利潤增長	-9%	22%	10%
毛利率	37%	30%	22%
淨利率	23%	12%	8%
EPS 基本	719	913	787
P/E	10.0x	9.1x	10.4x

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
SCR	**1,942**	**HOSE**	**21.8%**	**8.2%**	**6.8x**	**0.4x**
VIC	388,303	HOSE	24.1%	4.9%	51.6x	5.1x
VHM	281,911	HOSE	25.1%	38.0%	13.5x	5.1x
NVL	53,325	HOSE	33.7%	21.4%	15.1x	2.4x
KDH	13,447	HOSE	42.7%	27.8%	14.6x	1.8x
產業平均			**26.9%**	**20.7%**	**35.5x**	**4.5x**

SCR – 中期風險降低

- SCR 的價格圖表大幅上漲至 5.0 以上。同時，價格圖顯示進入累積期的跡象。 我們評估中期風險趨於下降，因此我們預計價格圖很難跌破 4.5 的支撐位。
- SCR 的短期趨勢從下跌轉為上漲，但是該股票的股票評級僅為 54 點，因此我們將中長期增長評估為中等，不建議買進這個股票。

SCR 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

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
TCH	41.20	上漲	上漲	24/12/2019	T+31	30.05	39.47	37.10%	持有	*低風險*
DHC	39.00	下跌	上漲	17/1/2020	T+13	39.60	39.08	-1.31%	賣出	*高風險*
VIB	17.20	上漲	上漲	22/1/2020	T+10	17.80	17.07	-3.37%	持有	*低風險*
PTB	67.90	上漲	下跌	4/2/2020	T+1	70.00	62.72	-3.00%	持有	*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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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.

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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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