

關注個股 KSB

2020/03/02

平陽礦業建築股份公司

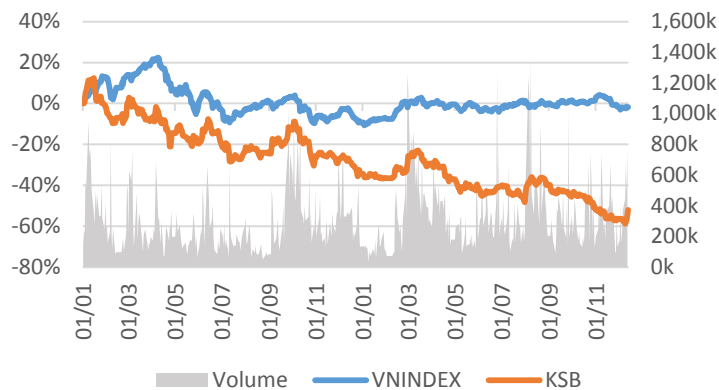
收盤價 19,650

平陽礦業建築股份公司

交易所：HOSE - 行業板塊：開礦

個股資料

市值：	1,025	十億 VND
流通股數：	53,546,782	股
上市日期：	1/20/2010	
國家持有：	0%	
外資持有：	11%	
EPS 基本：	6,252	VND
P/E (TTM)：	3.1x	
P/B (TTM)：	0.8x	
ROE (%)：	29%	
ROA (%)：	10%	
股息比率：	0%	



技術分析

短期阻力關卡：	20.00
短期支撐關卡：	18.55
短期趨勢 (5-10 天)：	上漲
中期阻力關卡：	22.32
中期支撐關卡：	17.21
中期趨勢 (1-3 月)：	上漲

	2016 年	2017 年	2018 年
營收增長	15%	29%	6%
稅後利潤增長	64%	35%	18%
毛利率	40%	40%	49%
淨利率	24%	25%	28%
EPS 基本	7,836	5,035	5,526
P/E	3.6x	5.2x	4.1x

同行業公司比較

同行業公司總數: 38

股票編號	市值 (十億 VND)	交易所	毛利 %	D/E	P/E	P/B
KSB	1,025	HOSE	48.8%	28.0%	3.1x	0.8x
MSR	14,450	UPCOM	31.5%	11.8%	41.0x	1.2x
SQC	8,799	UPCOM	-170.4%	-336.4%	-372.6x	11.4x
KSV	2,600	UPCOM	14.4%	3.2%	2048.1x	1.3x
MVB	882	UPCOM	0.0%	0.0%	3.1x	0.6x
產業平均			-31.3%	-88.1%	90.9x	4.2x

KSB - 動性自 2020 年 2 月以來急劇增加

股票代碼	KSB
建議價格	19.65
目前價格	19.65
短期趨勢	上漲
中期趨勢	上漲
短期目標	22.32
與目前價格相比的短期上漲空間	13.58%
短期停損	18.55

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Reward/Risk	2.42
預期持有 (盤)	19
最佳分配比例	N/A
建議	N/A

- KSB 的股票評級為 67 點，表明 KSB 的中期增長評估為中等，我們不建議購買該股票。KSB 的基本點有所下跌，但仍維持在 90 點以上，但基本增長動力已減弱。主要原因是核心業務增長勢頭放緩，並嚴重依賴同業中其他公司的併購，其中，值得注意的是 KSB 增加在 VLB 股權的業務。
- 自 2020 年 2 月以來，流動性已顯著改善，平均 20 盤的交易量也達到了 2019 年以來的最高水平，這對 KSB 的短期趨勢有很好的影響。同時，KSB 的短期趨勢從下跌轉為上漲。但是，我們尚未建議新購買此股票，因為它尚未達到積極增長的目標。



KSB 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/>

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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
PPC	27.55	上漲	上漲	7/2/2020	T+16	26.80	26.96	2.80%	持有	
IDJ	17.70	上漲	上漲	7/2/2020	T+16	9.20	15.69	92.39%	持有	價格強度接近 100 點，基本點出現下跌的跡象，表明價格上漲的動力不太大
TIG	7.10	上漲	上漲	13/2/2020	T+12	6.40	6.74	10.94%	持有	價格強度達到 99 點以上，但基本點已明顯改善，因此該股價格的漲勢仍然存在
VIB	18.10	上漲	上漲	14/2/2020	T+11	18.20	17.71	-0.55%	持有	
CTR	44.80	上漲	上漲	20/2/2020	T+7	48.20	44.29	-7.05%	持有	
SHB	9.60	上漲	上漲	27/2/2020	T+2	8.00	7.55	20.00%	持有	
FPT	55.10	上漲	下跌	28/2/2020	T+1	56.00	52.63	-1.61%	持有	

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



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