

## 關注個股 CSV

2020/05/18

南部基礎化學股份公司

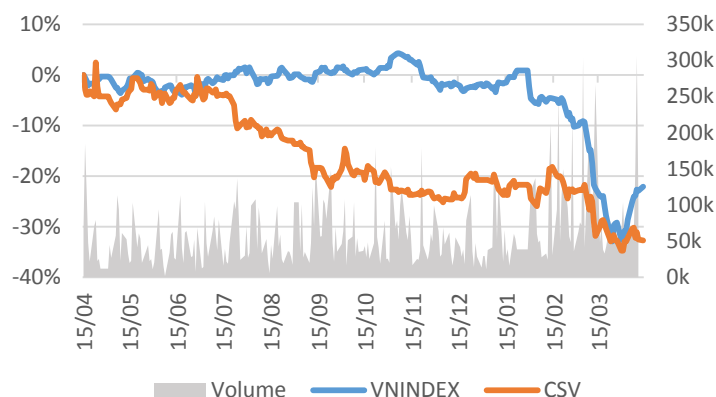
收盤價 21,800

南部基礎化學股份公司

交易所：HOSE - 行業板塊：化學品

### 個股資料

市值：	941	十億 VND
流通股數：	44,200,000	股
上市日期：	3/18/2015	
國家持有：	65%	
外資持有：	9%	
EPS 基本：	5,275	VND
P/E (TTM)：	4.0x	
P/B (TTM)：	1.0x	
ROE (%)：	25%	
ROA (%)：	18%	
股息比率：	0%	



### 技術分析

短期阻力關卡：	22.30
短期支撐關卡：	20.60
短期趨勢 (5-10 天)：	上漲
中期阻力關卡：	26.17
中期支撐關卡：	18.62
中期趨勢 (1-3 月)：	上漲

	2016 年	2017 年	2018 年
營收增長	1%	39%	-63%
稅後利潤增長	81%	46%	3%
毛利率	39%	32%	58%
淨利率	33%	30%	38%
EPS 基本	1,873	2,415	2,678
P/E	14.2x	11.1x	10.5x

### 同行業公司比較

同行業公司總數：10

股票編號	市值 (十億 VND)	交易所	毛利 %	D/E	P/E	P/B
CSV	941	HOSE	26.6%	15.9%	4.0x	1.0x
DGC	4,127	HNX	22.6%	14.5%	6.4x	1.2x
PLC	1,317	HNX	13.5%	2.4%	10.5x	1.0x
VET	901	UPCOM	38.0%	13.7%	11.0x	2.7x
HVT	401	HNX	22.8%	9.2%	8.6x	1.8x
產業平均			22.0%	11.5%	7.8x	1.3x

### CSV - 突破力仍不夠強勁

- CSV 的股票評級為 67 點，因此我們對該股票的增長評估為中性。該股基數是高於 80 點，因此投資者可將該股票加入關注列表。
- 從 2020 年 4 月上旬到現在，流動性急劇增加。同時，價格圖形成了一個反轉模式 (Cup with Handle)，但突破價格圖的強度不足，並正面臨最近的阻力位 22.3 - 這是短期內的強阻力。如果價格圖表完全突破 22.3 的水平，短期上漲趨勢則可能會擴展到預期的目標 26.17。



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- 建議：觀察並等待我們的新購買點。



CSV 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。想了解更多上市公司的股票水平有關的更多信息，請按下以下鏈接：

<https://ysradar.yuanta.com.vn/stockrating/>



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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	報酬%	建議	短期風險評估
VCB	76.00	上漲	上漲	3/4/2020	T+31	65.00	70.85	16.92%	持有	橫盤整理
FPT	48.00	上漲	上漲	4/4/2020	T+30	44.60	46.23	7.62%	持有	橫盤整理
BID	38.60	上漲	下跌	7/4/2020	T+29	36.70	36.91	5.18%	持有	橫盤整理
CTG	20.90	上漲	下跌	7/4/2020	T+29	20.10	20.00	3.98%	持有	橫盤整理
CTR	42.70	上漲	上漲	7/4/2020	T+29	34.50	39.57	23.77%	持有	橫盤整理
DHC	37.50	上漲	上漲	10/4/2020	T+26	34.00	35.79	10.29%	持有	橫盤整理
DBC	30.05	上漲	上漲	29/4/2020	T+13	28.35	28.87	6.00%	持有	強勁波動
DRH	5.84	上漲	上漲	7/5/2020	T+7	5.48	5.78	6.57%	持有	強勁波動
VPB	23.85	上漲	上漲	11/5/2020	T+5	22.80	21.77	4.61%	持有	橫盤整理
LIX	59.50	上漲	上漲	12/5/2020	T+4	59.60	57.71	-0.17%	持有	橫盤整理

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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