

Değerleme Tablosu
02/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF

BIST-100	10,209	Piyasa Değeri (mn)	\$	437,117
1 Yıl İçin Nom. TL. Hedef	12,439	Halka Açık Piyasa Değeri (mn)	\$	113,317
Yükseliş Potansiyeli (TL)	22%			

PIYASA ÇARPANLARI (HOLDİNGLER HARİCİ)

Net Kar	2022	2023	2024T	2024T	2024T	2024T
	671,935	1012%	975,896	45%	1,088,299	12%
FK	9.3		6.4		5.8	
FD/FAVÖK *	4.5		4.9		5.2	

* FD/FAVÖK sadece sanayi şirketleri için hesaplanmaktadır

Banka	OYAK YATIRIM Tavsiyesi	Carli / Hedef	Yükseliş			Piyasa Değ. (mn \$)	FD Piyasa Değ. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort.Özsem. 2024T	FK			FD/FAVÖK		
			Fiyat (TL)	Potansiyeli	(%)				2022	2023	2024T		2022	2023	2024T	2022	2023	2024T
Bankacılık		Kapanış	Hedef Fiyat	Potansiyel		50,163	14,032	564.2	277,519	339,712	400,395		5.8	4.8	4.0	1.9	1.3	1.1
AKBNK	EP	58.15	80.61	39%	9,359	4,867	122.2	60,024	66,479	74,254	31.2%	5.0	4.5	4.1	2.0	1.4	1.1	
ALBRK	EÜ	5.02	6.69	33%	388	148	3.9	1,365	3,429	5,310	33.1%	9.2	3.7	2.4	1.5	0.9	0.7	
GARAN	EP	83.60	114.45	37%	10,868	1,521	67.3	58,509	87,332	98,171	37.7%	6.0	4.0	3.6	2.3	1.4	1.3	
HALKB	EP	16.86	18.83	12%	3,749	337	36.3	15,266	10,112	11,911	8.9%	7.9	12.0	10.2	1.3	0.9	0.9	
ISCTR	EÜ	13.64	15.71	15%	10,554	3,272	157.4	61,538	72,265	94,875	34.0%	5.5	4.7	3.6	1.8	1.3	1.2	
TSKB	EÜ	9.76	12.35	27%	846	330	9.6	4,055	7,041	10,661	40.7%	6.7	3.9	2.6	2.1	1.3	0.9	
YKBNB	EÜ	20.32	23.76	17%	6,236	374	33.4	24,017	25,046	32,122	17.1%	8.4	8.0	6.3	1.9	1.2	1.0	
YKBNK	EÜ	31.22	48.44	55%	8,162	3,183	134.1	52,745	68,009	73,091	35.5%	5.0	3.9	3.6	2.1	1.5	1.1	
Şişirticilik		Kapanış	Hedef Fiyat	Potansiyel		4,583	1,109	19.4	2,787	14,624	24,796		53.1	10.1	6.0	9.2	4.1	2.5
AKGRT	EP	7.33	9.13	25%	366	102	5.5	-121	1,185	1,701	41.2%	n.m.	10.0	6.9	6.1	3.6	2.4	
AGESA	EP	86.10	80.17	-7%	480	96	1.9	834	1,374	2,205	59.4%	18.6	11.3	7.0	9.2	5.3	3.5	
ANSGR	EÜ	80.50	142.82	58%	1,401	490	5.6	1,133	5,909	9,204	48.7%	39.9	7.7	4.9	7.5	3.2	1.9	
TURSG	EP	65.00	80.50	24%	2,337	421	6.5	941	6,155	11,686	54.8%	60.2	12.3	6.5	11.8	4.9	2.8	
Banka Dışı		Kapanış	Hedef Fiyat	Potansiyel		19,637	9,540	453	56,428	191,441	107,017		11.2	3.3	5.9	10.4	7.0	4.9
Havacılık		Kapanış	Hedef Fiyat	Potansiyel		19,637	9,540	453	56,428	191,441	107,017		11.2	3.3	5.9	10.4	7.0	4.9
PGSUS	EÜ	1,035.00	1,282.00	24%	3,277	1,409	75.9	7,100	20,908	12,926	84.905	14.9	5.1	8.2	13.5	8.8	5.8	
TAVHL	EÜ	219.50	300.00	37%	2,468	1,185	21.0	1,899	7,530	5,146	62,227	42.0	10.6	15.5	25.3	14.3	8.1	
THYAO	EÜ	325.25	458.00	41%	13,892	6,946	356.3	47,429	163,003	88,945	242,746	9.5	2.8	5.0	8.8	6.0	4.3	
Otomotiv		Kapanış	Hedef Fiyat	Potansiyel		21,528	4,316	143	57,027	93,103	101,348		12.2	7.5	6.9	10.8	7.4	6.5
DOAS	EP	289.75	405.00	40%	1,973	365	43.6	15,613	19,622	21,585	1,879	4.1	3.2	3.0	4.9	2.7	2.8	
FROTO	EÜ	1,139.00	1,475.00	29%	12,371	2,227	38.6	27,730	49,056	49,826	60,531	14.4	8.1	8.0	14.4	10.8	8.2	
TOASO	EÜ	278.50	330.00	18%	4,310	1,034	40.8	9,374	15,083	18,575	-13,025	14.9	9.2	7.5	7.0	6.4	6.0	
TTRAK	EP	928.00	1,128.00	21%	2,874	690	20.2	4,310	9,342	11,362	-6,553	21.5	9.9	8.2	17.6	6.5	6.2	
Çimento		Kapanış	Hedef Fiyat	Potansiyel		1,861	600	18	6,012	4,862	8,633		1,440	10.0	12.4	7.0	17.7	8.8
AKONS	EÜ	154.20	244.60	59%	914	174	5.9	1,935	2,371	4,366	-900	15.3	12.4	6.8	17.7	7.3	4.9	
CİMSA	EÜ	32.38	50.50	56%	948	426	12.5	4,077	2,491	4,267	2,340	7.5	12.3	7.2	17.7	10.3	8.1	
Holdingle		Kapanış	Hedef Fiyat	Potansiyel		24,471	7,131	164	112,083	121,737	172,154		-4,484	7.1	6.5	4.6	2.7	4.9
KCHOL	EÜ	235.00	244.00	4%	18,445	4,058	88.0	72,662	72,230	112,870	-1,394	8.2	8.3	5.3	2.9	3.5	n.a.	
SAHOL	EÜ	92.70	95.00	2%	6,026	3,073	75.5	39,421	49,507	59,584	-3,100	4.9	3.9	3.3	2.3	n.a.	n.a.	
Savunma		Kapanış	Hedef Fiyat	Potansiyel		10,674	2,794	100	3,300	9,258	25,847		22,625	104.5	37.2	13.3	24.9	20.8
ASELS	EP	62.10	62.45	1%	8,765	2,279	93.3	1,282	7,290	21,820	13,328	220.9	38.8	13.0	21.2	18.6	13.1	
OTKAR	EP	514.00	700.00	36%	1,909	515	6.5	2,018	1,968	4,027	9,297	30.6	31.3	15.3	93.8	42.9	11.7	
Bayaz Eya		Kapanış	Hedef Fiyat	Potansiyel		3,693	554	21.3	6,285	7,667	8,131		60,164	19.0	15.6	14.7	11.5	9.2
ARCLK	EP	176.60	185.00	5%	3,693	554	21.3	6,285	7,667	8,131	60,164	19.0	15.6	14.7	11.5	9.2	6.6	
Yiyecek & İçecek		Kapanış	Hedef Fiyat	Potansiyel		10,632	3,102	59	8,110	19,569	33,864		57,898	42.4	17.6	10.1	11.7	6.5
AEFES	EÜ	185.90	224.00	20%	3,407	1,090	15.5	3,429	7,780	12,236	18,586	32.1	14.1	9.0	7.4	4.2	2.8	
KCOLA	EÜ	713.00	828.00	16%	5,613	1,403	14.9	4,331	8,306	15,849	14,909	41.9	21.8	11.4	19.2	10.4	6.4	
KRVGD	EP	27.90	29.00	4%	207	58	1.4	408	644	961	2,506	16.4	10.4	7.0	14.7	7.9	6.4	
TATGD	EP	27.42	40.00	46%	115	47	2.7	295	269	355	2,995	12.6	13.9	10.5	16.1	12.3	7.8	
ULKER	EP	112.80	89.00	-21%	1,289	503	24.7	-353	2,570	4,463	18,902	n.m.	16.2	9.3	11.1	5.8	4.4	
Çam		Kapanış	Hedef Fiyat	Potansiyel		4,911	2,406	65	22,739	17,121	25,201		40,422	7.0	9.3	6.3	6.6	10.8
SISE	EÜ	51.80	70.00	35%	4,911	2,406	65	22,739	17,121	25,201	40,422	7.0	9.3	6.3	6.6	10.8	6.3	
Şağlık		Kapanış	Hedef Fiyat	Potansiyel		1,545	541	5	4,742	4,530	4,551		3,243	10.5	11.0	11.0	12.5	9.2
MPARK	EÜ	240.00	245.00	2%	1,545	541	5	4,742	4,530	4,551	3,243	10.5	11.0	11.0	12.5	9.2	7.9	
Madencilik		Kapanış	Hedef Fiyat	Potansiyel		2,335	677	72	4,010	5,912	6,337		-9,561	18.8	12.8	11.9	21.8	23.5
KOZAL	EP	23.56	22.00	-7%	2,335	677	71.7	4,010	5,912	6,337	-9,561	18.8	12.8	11.9	21.8	23.5	16.5	
Petrol, gaz		Kapanış	Hedef Fiyat	Potansiyel		15,024	1,224	82	64,597	62,619	56,328		26,308	7.5	7.8	8.6	4.1	4.6
AKSA	EÜ	119.60	135.34	13%	1,198	443	9.0	4,564	1,652	4,915	154	8.5	23.4	7.9	7.0	9.6	5.4	
PETKM	EP	21.16	25.96	23%	12,166	5,961	138.5	61,314	53,577	47,144	-62,697	6.4	7.3	8.3	3.2	3.5	4.5	
TUPRS	EP	204.00	228.71	12%	1,660	780	73.3	-1,281	7,390	4,269	26,154	n.m.	7.3	13.2	140.9	-37.7	11.8	
GYO		Kapanış	Hedef Fiyat	Potansiyel		1,442	303	4	19,230	32,164	40,964		917	2.4	1.4	1.1	26.2	14.1
TROYO	EÜ	46.58	62.06	35%	1,442	303	4.1	19,230	32,164	40,964	917	2.4	1.4	1.1	26.2	14.1	9.5	
Perakende		Kapanış	Hedef Fiyat	Potansiyel		11,261	6,685	77	12,166	20,242	32,062		3,718	29.9	18.0	11.3	18.1	10.5
BİMAS	EÜ	403.75	494.00	22%	7,588	4,553	43.8	8,157	11,401	18,923	8,851	30.1	21.5	13.0	21.4	12.5	7.5	
MAVİ	EÜ	95.50	105.50	10%	1,174	857	9.8	1,439	2,887									