

Değerleme Tablosu
06/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF

BIST-100	10,267	Piyasa Değeri (mn)	\$	438,965
1 Yıl İçin Nom. TL Hedef	12,450	Halka Açık Piyasa Değeri (mn)	\$	114,429
Yükseliş Potansiyeli (TL)	21%			

PIYASA ÇARPANLARI (HOLDİNGLER HARİCİ)

Net Kar	2022	2023	2024T	2023T	2024T	Değ.	2024T	Değ.
	669,588	1008%	975,896	46%	1,087,364	11%		
FİK	9.4		6.5		5.8			
FD/FAVÖK *	4.5		4.9		5.3			

* FD/FAVÖK sadece sanayi şirketleri için hesaplanmaktadır

Banka	OYAK YATIRIM Tavsiyesi	Carı / Hedef	Yükseliş (%)			Piyasa Değ. (mn \$)	FD Piyasa Değ. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort.Özsem. 2024T	FİK			FD/FAVÖK		
			Fiyat (TL)	Potansiyeli					2022	2023	2024T		2022	2023	2024T	2022	2023	2024T
Bankacılık		Kapanış	Hedef Fiyat	Potansiyel		50,396	14,188	564.3	277,519	339,712	399,460		5.9	4.8	4.1	1.9	1.3	1.1
AKBNK	EP	60.25	80.61	34%	9,716	5,052	121.2	60,024	66,479	74,254	31.2%	5.2	4.7	4.2	2.0	1.5	1.2	
ALBRK	EÜ	5.09	6.69	31%	395	150	3.9	1,365	3,429	5,310	33.1%	9.3	3.7	2.4	1.6	1.0	0.7	
GARAN	EP	84.30	114.45	36%	10,980	1,537	66.4	58,509	87,332	98,171	37.7%	6.1	4.1	3.6	2.3	1.4	1.3	
HALKB	EP	16.61	18.83	13%	3,701	333	37.0	15,266	10,112	11,911	8.9%	7.8	11.8	10.0	1.3	0.9	0.9	
ISCTR	EÜ	13.58	15.71	16%	10,528	3,264	158.9	61,538	72,265	94,875	34.0%	5.5	4.7	3.6	1.8	1.3	1.2	
TSKB	EÜ	9.88	14.71	49%	858	335	9.7	4,055	7,041	9,726	37.1%	6.8	3.9	2.8	2.2	1.3	0.9	
YAKBN	EÜ	19.99	23.76	19%	6,147	369	33.6	24,017	25,046	32,122	17.1%	8.3	7.9	6.2	1.9	1.2	1.0	
YKBNK	EÜ	30.82	48.44	57%	8,073	3,149	133.6	52,745	68,009	73,091	35.5%	4.9	3.8	3.6	2.1	1.5	1.1	
Şişirticilik		Kapanış	Hedef Fiyat	Potansiyel		4,604	1,110	19.3	2,787	14,624	24,796		53.0	10.2	6.0	9.2	4.1	2.5
AKGRT	EP	7.38	9.13	24%	369	103	5.4	-121	1,185	1,701	41.2%	n.m.	10.0	7.0	6.1	3.6	2.4	
AGESA	EP	89.85	80.17	-11%	502	100	1.9	834	1,374	2,205	59.4%	19.4	11.8	7.3	9.6	5.5	3.6	
ANSGR	EÜ	88.85	142.82	61%	1,378	482	5.6	1,133	5,909	9,204	48.7%	39.2	7.5	4.8	7.3	3.1	1.9	
TURSG	EP	65.40	80.50	23%	2,356	424	6.4	941	6,155	11,686	54.8%	60.7	12.3	6.5	11.8	4.9	2.8	
Banka Dışı		Kapanış	Hedef Fiyat	Potansiyel		19,657	9,551	448	56,428	191,441	107,017	389,878	11.2	3.3	5.9	10.4	7.0	4.9
Havacılık		Kapanış	Hedef Fiyat	Potansiyel		19,657	9,551	448	56,428	191,441	107,017	389,878	11.2	3.3	5.9	10.4	7.0	4.9
PGSUS	EÜ	1,028.00	1,282.00	25%	3,261	1,402	77.1	7,100	20,908	12,926	84.905	14.8	5.0	8.1	13.5	8.8	5.8	
TAVHL	EÜ	217.00	300.00	38%	2,445	1,173	21.3	1,899	7,530	5,146	62,227	41.5	10.5	15.3	25.2	14.2	8.1	
THYAO	EÜ	326.00	458.00	40%	13,951	6,975	349.7	47,429	163,003	88,945	242,746	9.5	2.8	5.1	8.8	6.0	4.3	
Otomotiv		Kapanış	Hedef Fiyat	Potansiyel		21,770	4,363	144	57,027	93,103	101,348	42,830	12.3	7.5	6.9	10.9	7.4	6.5
DOAS	EP	302.00	405.00	34%	2,060	381	44.0	15,613	19,622	21,585	1,879	4.3	3.4	3.1	5.1	2.8	2.9	
FROTO	EÜ	1,147.00	1,475.00	29%	12,482	2,247	38.4	27,730	49,056	49,826	60,531	14.5	8.2	8.1	14.5	10.8	8.3	
TOASO	EÜ	271.75	330.00	21%	4,214	1,011	41.5	9,374	15,083	18,575	-13,025	14.5	9.0	7.3	6.8	6.2	5.8	
TTRAK	EP	971.50	1,128.00	16%	3,015	724	20.3	4,310	9,342	11,362	-6,553	22.6	10.4	8.6	18.5	6.9	6.5	
Çimento		Kapanış	Hedef Fiyat	Potansiyel		1,906	618	18	6,012	4,862	8,633	1,440	10.2	12.6	7.1	18.1	8.9	6.5
AKONS	EÜ	155.60	244.60	57%	924	176	5.9	1,935	2,371	4,366	-90	15.4	12.6	6.8	17.8	7.4	5.0	
CİMSA	EÜ	33.50	50.50	51%	982	442	12.2	4,077	2,491	4,267	2,340	7.8	12.7	7.4	19.2	10.6	8.4	
Holdingle		Kapanış	Hedef Fiyat	Potansiyel		24,539	7,169	164	112,083	121,737	172,154	-4,484	7.1	6.5	4.6	2.7	4.9	n.a.
KCHOL	EÜ	234.40	244.00	4%	18,433	4,055	88.8	72,662	72,230	112,870	-1,394	8.2	8.2	5.3	2.9	3.5	n.a.	
SAHOL	EÜ	93.75	95.00	1%	6,106	3,114	75.0	39,421	49,507	59,584	-3,100	5.0	4.0	3.3	2.3	n.a.	n.a.	
Savunma		Kapanış	Hedef Fiyat	Potansiyel		10,856	2,843	99	9,258	25,847	22,625	106.1	37.8	13.5	25.3	21.1	13.0	
ASELS	EP	62.40	62.45	0%	8,624	2,294	92.8	1,282	7,290	21,820	13,328	22.0	39.0	13.0	21.3	18.7	13.1	
OTKAR	EP	546.00	700.00	28%	2,032	549	6.6	2,018	1,968	4,027	9,297	32.5	33.3	16.3	98.9	45.2	12.4	
Bayaz Eya		Kapanış	Hedef Fiyat	Potansiyel		3,755	563	22.1	6,285	7,667	8,131	60,164	19.3	15.8	14.9	11.6	9.3	6.7
ARCLK	EP	179.20	185.00	3%	3,755	563	22.1	6,285	7,667	8,131	60,164	19.3	15.8	14.9	11.6	9.3	6.7	
Yiyecek & İçecek		Kapanış	Hedef Fiyat	Potansiyel		10,892	3,185	58	8,110	19,569	33,864	57,898	43.3	17.9	10.4	12.0	6.6	4.4
AEFES	EÜ	192.10	224.00	17%	3,527	1,129	15.0	3,429	7,780	12,236	18,586	33.2	14.6	9.3	7.6	4.3	2.9	
KCOLA	EÜ	720.50	828.00	15%	5,683	1,421	14.4	4,331	8,306	15,849	14,909	42.3	22.1	11.6	19.4	10.5	6.4	
KROVD	EP	28.26	29.00	3%	210	59	1.4	408	644	961	2,506	16.6	10.5	7.1	14.8	7.9	a.d.	
TATGD	EP	27.10	40.00	48%	114	47	2.6	295	269	355	2,995	12.5	13.7	10.4	16.0	12.2	7.7	
ULKER	EP	118.50	89.00	-25%	1,357	529	24.6	-353	2,570	4,463	18,902	n.m.	17.0	9.8	11.5	6.0	4.6	
Çam		Kapanış	Hedef Fiyat	Potansiyel		4,864	2,383	65	22,739	17,121	25,201	40,422	6.9	9.2	6.2	6.6	10.7	6.3
SISE	EÜ	51.20	70.00	37%	4,864	2,383	64.9	22,739	17,121	25,201	40,422	6.9	9.2	6.2	6.6	10.7	6.3	
Sağlık		Kapanış	Hedef Fiyat	Potansiyel		1,626	569	5	4,742	4,530	4,551	3,243	11.1	11.6	11.5	13.1	9.7	8.3
MPARK	EÜ	252.00	245.00	-3%	1,626	569	5.0	4,742	4,530	4,551	3,243	11.1	11.6	11.5	13.1	9.7	8.3	
Madencilik		Kapanış	Hedef Fiyat	Potansiyel		2,302	668	71	4,010	5,912	6,337	-9,561	18.5	12.6	11.7	21.4	23.1	16.2
KOZAL	EP	23.18	22.00	-5%	2,302	668	71.1	4,010	5,912	6,337	-9,561	18.5	12.6	11.7	21.4	23.1	16.2	
Petrol, gaz		Kapanış	Hedef Fiyat	Potansiyel		14,806	1,206	81	64,597	62,619	56,328	26,308	7.4	7.6	8.5	4.1	4.5	5.1
AKSA	EÜ	121.90	135.34	11%	1,224	453	9.2	4,564	1,652	4,915	154	8.6	23.9	8.0	7.2	9.8	5.5	
PETKM	EP	20.38	25.96	27%	11,980	5,870	137.4	61,314	53,577	47,144	-62,697	6.3	7.2	8.2	3.2	3.4	4.4	
TUPRS	EP	200.50	228.71	14%	1,602	753	71.8	-1,281	7,390	4,269	26,154	n.m.	7.0	12.1	137.4	-36.8	11.6	
GYO		Kapanış	Hedef Fiyat	Potansiyel		1,417	298	4	16,883	32,164	40,964	297	2.7	1.4	1.1	14.1	13.6	9.2
TROYO	EÜ	45.70	62.06	38%	1,417	298	4.1	16,883	32,164	40,964	297	2.7	1.4	1.1	14.1	13.6	9.2	
Ferakende		Kapanış	Hedef Fiyat	Potansiyel		11,645	6,904	78	12,166	20,242	32,062	3,718	30.9	18.6	11.7	18.7	10.9	6.2
BİMAS	EÜ	417.50	494.00	18%	7,961	4,717	44.2	8,157	11,401	18,923	8,851	31.1	22.2	13.4				