

Değerleme Tablosu
07/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF

BIST-100	10,337	Piyasa Değeri (mn)	\$	444,342
1 Yıl İçin Nom. TL Hedef	12,406	Halka Açık Piyasa Değeri (mn)	\$	115,022
Yükseliş Potansiyeli (TL)	20%			

PIYASA ÇARPANLARI (HOLDİNGLER HARİCİ)

Net Kar	2022	2023	2024T	2024T	2024T	2024T
	669,588	1008%	975,896	46%	1,086,449	11%
FK	9.5	6.5			5.9	
FD/FAVÖK *	4.5	4.9			5.3	

* FD/FAVÖK sadece sanayi şirketleri için hesaplanmaktadır

Banka	OYAK YATIRIM Tavsiyesi	Carli / Hedef Fiyat	Yükseliş Potansiyeli (%)	Piyasa Değ. (mn \$)	FD Piyasa Değ. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort.Özsem. 2024T	FK			FD/FAVÖK		
							2022	2023	2024T		2022	2023	2024T	2022	2023	2024T
Bankacılık		Kapanış	Hedef Fiyat	Potansiyel	51,637	14,538	569.6	277,519	339,712	398,545	6.0	4.9	4.2	2.0	1.3	1.1
AKBNK	EP	61.60	80.61	31%	9,940	5,169	122.3	60,024	66,479	74,254	31.2%	5.3	4.8	4.3	2.1	1.5
ALBRK	EÜ	4.98	7.31	47%	386	147	4.0	1,365	3,429	4,385	27.9%	9.1	3.6	2.8	1.5	0.9
GARAN	EP	86.85	114.45	32%	11,320	1,585	66.3	58,509	87,332	98,171	37.7%	6.2	4.2	3.7	2.4	1.5
HALKB	EP	17.02	18.83	11%	3,795	342	37.5	15,266	10,112	11,911	8.9%	8.0	12.1	10.3	1.3	1.0
ISCTR	EÜ	13.87	15.71	13%	10,761	3,336	161.1	61,538	72,265	94,875	34.0%	5.6	4.8	3.7	1.8	1.3
TSKB	EÜ	10.13	14.71	45%	890	343	9.6	4,055	7,041	9,726	37.1%	7.0	4.0	2.9	2.2	1.3
YAKBN	EÜ	20.28	23.76	17%	6,240	374	33.7	24,017	25,046	32,122	17.1%	8.4	8.0	6.3	1.9	1.2
YKBNK	EÜ	31.72	48.44	53%	8,315	3,243	135.0	52,745	68,009	73,091	35.5%	5.1	3.9	3.7	2.1	1.5
Şiğirtacılık		Kapanış	Hedef Fiyat	Potansiyel	4,645	1,124	19.3	2,787	14,624	24,796	53.7	10.2	6.0	9.3	4.2	2.5
AKGRT	EP	7.23	9.13	26%	362	101	5.4	-121	1,185	1,701	41.2%	n.m.	9.8	6.9	6.0	3.6
AGESA	EP	87.70	80.17	-9%	490	98	1.9	834	1,374	2,205	59.4%	18.9	11.5	7.2	9.3	5.3
ANSGR	EÜ	91.85	142.82	56%	1,425	499	5.6	1,133	5,909	9,204	48.7%	40.6	7.8	5.0	7.6	3.2
TURSG	EP	65.70	80.50	23%	2,368	426	6.4	941	6,155	11,686	54.8%	81.1	12.4	6.5	11.9	4.9
Banka Dışı		Kapanış	Hedef Fiyat	Potansiyel	19,912	9,675	451	56,428	191,441	107,017	11.4	3.4	6.0	10.5	7.0	4.9
Havacılık		Kapanış	Hedef Fiyat	Potansiyel	19,912	9,675	451	56,428	191,441	107,017	11.4	3.4	6.0	10.5	7.0	4.9
PGSUS	EÜ	1,043.00	1,282.00	23%	3,311	1,424	78.0	7,100	20,908	12,926	84.905	15.0	5.1	8.3	13.6	8.9
TAVHL	EÜ	219.00	300.00	37%	2,469	1,185	21.5	1,899	7,530	5,146	62,227	41.9	10.6	15.5	25.3	14.3
THYAO	EÜ	330.00	458.00	39%	14,132	7,066	351.6	47,429	163,003	88,945	242,746	9.6	2.8	5.1	8.9	6.0
Otomotiv		Kapanış	Hedef Fiyat	Potansiyel	21,874	4,386	145	57,027	93,103	101,348	42,830	12.4	7.6	7.0	10.9	7.5
DOAS	EP	303.75	405.00	33%	2,074	384	44.2	15,613	19,622	21,585	1,879	4.3	3.4	3.1	5.1	2.8
FROTO	EÜ	1,147.00	1,475.00	29%	12,490	2,248	38.5	27,730	49,056	49,826	60,531	14.5	8.2	8.1	14.5	10.8
TOASO	EÜ	274.25	330.00	20%	4,255	1,021	42.0	9,374	15,083	18,575	-13,025	14.6	9.1	7.4	6.9	6.3
TTRAK	EP	983.50	1,128.00	14%	3,054	733	20.2	4,310	9,342	11,362	-6,553	22.8	10.5	8.7	18.7	7.0
Çimento		Kapanış	Hedef Fiyat	Potansiyel	1,893	615	18	6,012	4,862	8,633	1,440	10.1	12.5	7.1	17.9	8.9
AKONS	EÜ	153.00	244.60	60%	909	173	5.9	1,935	2,371	4,366	-900	15.1	12.4	6.7	17.5	7.2
CMSA	EÜ	33.52	50.50	51%	894	443	12.1	4,077	2,491	4,267	2,340	7.8	12.7	7.4	19.2	10.6
Holdingle		Kapanış	Hedef Fiyat	Potansiyel	24,752	1,663	163	112,083	121,737	172,154	-4,484	7.1	6.6	4.6	2.8	4.9
KCHOL	EÜ	236.00	244.00	3%	18,572	4,086	89.3	72,662	72,230	112,570	-1,394	8.2	8.3	5.3	3.0	3.5
SAHOL	EÜ	95.25	95.00	0%	6,208	3,166	73.7	39,421	49,507	59,584	-3,100	5.1	4.0	3.4	2.4	n.a.
Savunma		Kapanış	Hedef Fiyat	Potansiyel	10,920	2,860	100	3,300	9,258	25,847	22,625	106.8	38.0	13.6	25.4	21.2
ASELS	EP	62.30	62.45	0%	8,816	2,292	93.0	1,282	7,290	21,820	13,328	221.6	39.0	13.0	21.3	18.6
OTKAR	EP	565.00	700.00	24%	2,104	568	6.8	2,018	1,968	4,027	9,297	33.6	34.5	16.8	101.9	46.6
Bayaz Eya		Kapanış	Hedef Fiyat	Potansiyel	3,856	578	22.0	6,285	7,667	8,131	60,164	19.8	16.2	15.3	11.8	9.4
ARCLK	EP	183.90	185.00	1%	3,856	578	22.0	6,285	7,667	8,131	60,164	19.8	16.2	15.3	11.8	9.4
Yiyecek & İçecek		Kapanış	Hedef Fiyat	Potansiyel	10,904	3,190	58	8,110	19,569	33,864	57,898	43.3	18.0	10.4	12.0	6.6
AEFES	EÜ	196.00	224.00	14%	3,601	1,152	14.9	3,429	7,780	12,236	18,586	33.8	14.9	9.5	7.7	4.4
KCOLA	EÜ	714.50	828.00	16%	5,640	1,410	14.3	4,331	8,306	15,849	14,909	42.0	21.9	11.5	19.2	10.4
KRVGD	EP	27.76	29.00	4%	207	58	1.5	408	644	961	2,506	16.3	10.3	6.9	14.6	7.8
TATGD	EP	26.50	40.00	51%	112	46	2.5	295	269	355	2,995	12.2	13.4	10.1	15.8	12.1
ULKER	EP	117.30	89.00	-24%	1,344	524	24.7	-353	2,570	4,463	18,902	n.m.	16.9	9.7	11.4	5.9
Çam		Kapanış	Hedef Fiyat	Potansiyel	4,957	2,429	64	22,739	17,121	25,201	40,422	7.0	9.3	6.3	6.7	10.9
SISE	EÜ	52.15	70.00	34%	4,957	2,429	64.3	22,739	17,121	25,201	40,422	7.0	9.3	6.3	6.7	10.9
Şağlık		Kapanış	Hedef Fiyat	Potansiyel	1,608	563	5	4,742	4,530	4,551	3,243	10.9	11.4	11.4	12.9	9.6
MPARK	EÜ	249.00	245.00	-2%	1,608	563	5.0	4,742	4,530	4,551	3,243	10.9	11.4	11.4	12.9	9.6
Madencilik		Kapanış	Hedef Fiyat	Potansiyel	2,308	669	71	4,010	5,912	6,337	-9,561	18.5	12.6	11.7	21.4	23.1
KOZAL	EP	23.22	22.00	-5%	2,308	669	70.5	4,010	5,912	6,337	-9,561	18.5	12.6	11.7	21.4	23.1
Petrol, gaz		Kapanış	Hedef Fiyat	Potansiyel	14,617	1,179	80	64,597	62,619	56,328	26,308	7.3	7.5	8.4	4.0	4.5
AKSA	EÜ	117.50	135.34	15%	1,180	437	9.3	4,564	1,652	4,915	154	8.3	23.0	7.7	6.9	9.4
PETKM	EP	20.08	25.96	29%	11,857	5,810	136.9	61,314	53,577	47,144	-62,697	6.2	7.1	8.1	3.1	3.3
TUPRS	EP	198.30	228.71	15%	1,579	742	70.2	-1,281	7,390	4,269	26,154	n.m.	6.9	11.9	136.1	-36.4
GYO		Kapanış	Hedef Fiyat	Potansiyel	1,418	298	4	16,883	32,164	40,964	297	2.7	1.4	1.1	14.1	13.6
TROYO	EÜ	45.68	62.06	38%	1,418	298	4.2	16,883	32,164	40,964	297	2.7	1.4	1.1	14.1	13.6
Perakende		Kapanış	Hedef Fiyat	Potansiyel	11,691	6,939	79	12,166	20,242	32,062	3,718	31.0	18.6	11.7	18.7	10.9
BIMAS	EÜ	419.00	494.00	18%	7,895	4,737	44.4	8,157	11,401	18,923	8,851	31.2	22.3	13.4	22.2	13.0
MAVI	EÜ	98.00	105.50	8%	1,208	882	10.1	1,439	2,887	4,971	-2,586	27.1	13.5	7.8	14.6	7.5
MGROS	EÜ	460.50	521.00	13%	2,587	1,320	24.0	2,570	5,954	8,168	-2,547	32.4	14.0	10.2	13.5	8.3
Demir-çelik		Kapanış	Hedef Fiyat	Potansiyel	666	593	48	1,108	2,358	5,624	-2,555	19.4	9.1	3.8	3.7	3.0
KRDMD	EÜ	27.52	37.60	37%	666	5										