

Değerleme Tablosu  
08/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF

BIST-100	10,248	Piyasa Değeri (mn)	\$ 442,407
1 Yıl İçin Nom. TL. Hedef	12,420	Halka Açık Piyasa Değeri (mn)	\$ 114,316
Yükseliş Potansiyeli (TL)	21%		

PIYASA ÇARPANLARI (HOLDİNGLER HARİCİ)

Net Kar	2022	2023	2024T	2024T	Değ.	2024T	Değ.
	669,588	1008%	975,896	46%	1,086,694	11%	
FK	9.4	6.5	5.8				
FD/FAVÖK *	4.5	4.9	5.2				

\* 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	FK			FD/FAVÖK		
			Fiyat (TL)	Potansiyeli	(%)				2022	2023	2024T		2022	2023	2024T	2022	2023	2024T
<b>Bankacılık</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>5,028</b>	<b>14,308</b>	<b>573.3</b>	<b>277,519</b>	<b>339,712</b>	<b>398,545</b>		<b>5.9</b>	<b>4.8</b>	<b>4.1</b>	<b>2.0</b>	<b>1.3</b>	<b>1.1</b>
AKBNK	EP	60.00	80.61	34%	9,687	5,037	124.2	60,024	66,479	74,254	31.2%	5.2	4.7	4.2	2.0	1.5	1.2	
ALBRK	EÜ	4.93	7.31	48%	383	145	4.0	1,365	3,429	4,385	27.9%	9.0	3.6	2.8	1.5	0.9	0.7	
GARAN	EP	86.00	114.45	33%	11,215	15,70	66.0	58,509	87,332	98,171	37.7%	6.2	4.1	3.7	2.4	1.5	1.3	
HALKB	EP	16.99	18.83	11%	3,790	341	38.5	15,266	10,112	11,911	8.9%	8.0	12.1	10.2	1.3	1.0	0.9	
ISCTR	EÜ	13.55	15.71	16%	10,518	3,261	161.7	61,538	72,265	94,875	34.0%	5.5	4.7	3.6	1.8	1.3	1.2	
TSKB	EÜ	10.37	14.71	42%	902	352	9.4	4,055	7,041	9,726	37.1%	7.2	4.1	3.0	2.3	1.4	0.9	
YKBNB	EÜ	20.34	23.76	17%	6,262	376	33.8	24,017	25,046	32,122	17.1%	8.4	8.1	6.3	1.9	1.2	1.0	
YKBNK	EÜ	31.54	48.44	54%	8,272	3,226	135.7	52,745	68,009	73,091	35.5%	5.1	3.9	3.6	2.1	1.5	1.1	
<b>Şişirticilik</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>4,754</b>	<b>11,153</b>	<b>19.1</b>	<b>2,787</b>	<b>14,624</b>	<b>25,041</b>		<b>54.9</b>	<b>10.5</b>	<b>6.1</b>	<b>9.5</b>	<b>4.3</b>	<b>2.5</b>
AKGRT	EP	7.56	9.13	21%	378	106	5.4	-121	1,185	1,701	41.2%	n.m.	10.3	7.2	6.3	3.7	2.4	
AGESA	EP	89.15	116.14	30%	498	100	1.9	834	1,374	2,450	61.1%	19.2	11.7	6.5	9.5	5.4	3.2	
ANSGR	EÜ	94.45	142.82	51%	1,466	513	5.4	1,133	5,909	9,204	48.7%	41.7	8.0	5.1	7.8	3.3	2.0	
TURSG	EP	66.85	80.50	20%	2,411	434	6.4	941	6,155	11,686	54.8%	62.5	12.6	6.6	12.1	5.0	2.9	
<b>Banka Dışı</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>19,804</b>	<b>9,623</b>	<b>447</b>	<b>56,428</b>	<b>191,441</b>	<b>107,017</b>		<b>11.3</b>	<b>3.3</b>	<b>6.0</b>	<b>10.4</b>	<b>7.0</b>	<b>4.9</b>
Havacılık		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>19,804</b>	<b>9,623</b>	<b>447</b>	<b>56,428</b>	<b>191,441</b>	<b>107,017</b>		<b>11.3</b>	<b>3.3</b>	<b>6.0</b>	<b>10.4</b>	<b>7.0</b>	<b>4.9</b>
PGSUS	EÜ	1,033.00	1,282.00	24%	3,281	1,411	77.8	7,100	20,908	12,926	84.905	14.9	5.1	8.2	13.5	8.8	5.8	
TAVHL	EÜ	219.80	300.00	36%	2,479	1,190	22.0	1,899	7,530	5,146	62,227	42.0	10.6	15.5	25.3	14.4	8.1	
THYAO	EÜ	327.75	458.00	40%	14,043	7,022	347.2	47,429	163,003	89,945	242,746	9.5	2.8	5.1	8.8	6.0	4.4	
<b>Otomotiv</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>21,536</b>	<b>4,325</b>	<b>146</b>	<b>57,027</b>	<b>93,103</b>	<b>101,348</b>		<b>12.2</b>	<b>7.4</b>	<b>6.8</b>	<b>10.7</b>	<b>7.4</b>	<b>6.4</b>
DOAS	EP	297.75	405.00	36%	2,034	376	44.2	15,613	19,622	21,585	1,879	4.2	3.3	3.0	5.0	2.8	2.9	
FROTO	EÜ	1,120.00	1,475.00	32%	12,203	2,197	38.5	27,730	49,056	49,826	60,531	14.2	8.0	7.9	14.2	10.6	8.1	
TOASO	EÜ	272.25	330.00	21%	4,227	1,014	42.8	9,374	15,083	18,575	-13,025	14.5	9.0	7.3	6.8	6.3	5.9	
TTRAK	EP	989.00	1,128.00	14%	3,073	737	20.1	4,310	9,342	11,362	-6,553	23.0	10.6	8.7	18.8	7.0	6.6	
<b>Çimento</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>1,890</b>	<b>613</b>	<b>18</b>	<b>6,012</b>	<b>4,862</b>	<b>8,633</b>		<b>1.440</b>	<b>10.1</b>	<b>12.5</b>	<b>7.0</b>	<b>17.9</b>	<b>8.8</b>
AKONS	EÜ	153.40	244.60	59%	912	173	5.8	1,935	2,371	4,366	-900	15.2	12.4	6.7	17.6	7.2	4.9	
CIMSA	EÜ	33.30	50.50	52%	978	440	12.0	4,077	2,491	4,267	2,340	7.7	12.6	7.4	18.1	10.6	8.3	
<b>Holdingle</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>24,596</b>	<b>7,219</b>	<b>163</b>	<b>112,083</b>	<b>121,737</b>	<b>172,154</b>		<b>-4,484</b>	<b>7.1</b>	<b>6.5</b>	<b>4.6</b>	<b>2.7</b>	<b>4.9</b>
KCHOL	EÜ	233.20	244.00	5%	18,361	4,040	89.4	72,662	72,230	112,670	-1,394	8.1	8.2	5.3	2.9	3.4	n.a.	
SAHOL	EÜ	95.60	95.00	-1%	6,234	3,180	73.3	39,421	49,507	59,584	-3,100	5.1	4.1	3.4	2.4	n.a.	n.a.	
<b>Savunma</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>10,891</b>	<b>2,852</b>	<b>100</b>	<b>3,300</b>	<b>9,258</b>	<b>25,847</b>		<b>22,625</b>	<b>106.3</b>	<b>37.9</b>	<b>13.6</b>	<b>25.3</b>	<b>21.2</b>
ASELS	EP	62.40	62.45	0%	8,835	2,297	93.1	1,282	7,290	21,820	13,328	222.0	39.0	13.0	21.3	18.7	13.1	
OTKAR	EP	552.00	700.00	27%	2,057	565	6.8	2,018	1,968	4,027	9,297	32.8	33.7	16.5	99.8	48.7	12.5	
<b>Bayaz Eya</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>3,791</b>	<b>569</b>	<b>21.5</b>	<b>6,285</b>	<b>7,667</b>	<b>8,131</b>		<b>60,164</b>	<b>19.4</b>	<b>15.9</b>	<b>15.0</b>	<b>11.7</b>	<b>9.3</b>
ARCLK	EP	180.70	185.00	2%	3,791	569	21.5	6,285	7,667	8,131	60,164	19.4	15.9	15.0	11.7	9.3	6.7	
<b>Yiyecek &amp; İçecek</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>10,920</b>	<b>3,188</b>	<b>57</b>	<b>8,110</b>	<b>19,569</b>	<b>33,864</b>		<b>57,898</b>	<b>43.4</b>	<b>18.0</b>	<b>10.4</b>	<b>12.0</b>	<b>6.6</b>
AEFES	EÜ	193.90	224.00	16%	3,565	1,141	14.9	3,429	7,780	12,236	18,586	33.5	14.8	9.4	7.7	4.4	2.9	
COLA	EÜ	724.50	828.00	14%	5,722	1,431	14.2	4,331	8,306	15,849	14,909	42.6	22.2	11.6	19.5	10.5	6.5	
KROVD	EP	27.12	29.00	7%	202	57	1.5	408	644	961	2,506	16.0	10.1	6.8	14.4	7.7	a.d.	
TATGD	EP	26.46	40.00	51%	112	46	2.3	295	269	355	2,995	12.2	13.4	10.1	15.8	12.1	7.6	
ULKER	EP	115.10	89.00	-23%	1,320	515	24.3	-353	2,570	4,463	18,902	16.0	16.5	9.5	11.2	5.9	4.5	
<b>Çam</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>4,893</b>	<b>2,398</b>	<b>63</b>	<b>22,739</b>	<b>17,121</b>	<b>25,201</b>		<b>40,422</b>	<b>6.9</b>	<b>9.2</b>	<b>6.3</b>	<b>6.6</b>	<b>10.7</b>
SISE	EÜ	51.45	70.00	36%	4,893	2,398	62.6	22,739	17,121	25,201	40,422	6.9	9.2	6.3	6.6	10.7	6.3	
<b>Şağlık</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>1,615</b>	<b>565</b>	<b>5</b>	<b>4,742</b>	<b>4,530</b>	<b>4,551</b>		<b>3,243</b>	<b>11.0</b>	<b>11.5</b>	<b>11.4</b>	<b>13.0</b>	<b>9.6</b>
MPARK	EÜ	250.00	245.00	-2%	1,615	565	5	4,742	4,530	4,551	3,243	11.0	11.5	11.4	13.0	9.6	8.2	
<b>Madencilik</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>2,317</b>	<b>672</b>	<b>71</b>	<b>4,010</b>	<b>5,912</b>	<b>6,337</b>		<b>-9,561</b>	<b>18.6</b>	<b>12.6</b>	<b>11.8</b>	<b>21.5</b>	<b>23.2</b>
KOZAL	EP	23.30	22.00	-6%	2,317	672	70.7	4,010	5,912	6,337	-9,561	18.6	12.6	11.8	21.5	23.2	16.3	
<b>Petrol, gaz</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>14,260</b>	<b>1,167</b>	<b>78</b>	<b>64,597</b>	<b>62,619</b>	<b>56,328</b>		<b>26,308</b>	<b>7.1</b>	<b>7.3</b>	<b>8.2</b>	<b>3.9</b>	<b>4.3</b>
AKSA	EÜ	116.00	135.34	17%	1,166	431	9.4	4,564	1,652	4,915	154	8.2	22.7	7.6	6.8	9.3	5.3	
PETKM	EP	19.90	25.96	30%	11,528	5,649	135.3	61,314	53,577	47,144	-62,697	6.1	6.9	7.9	3.0	3.2	4.2	
TUPRS	EP	192.70	228.71	19%	1,566	736	69.1	-1,281	7,390	4,269	26,154	n.m.	6.8	11.8	135.2	-36.2	11.4	
<b>GYO</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>1,459</b>	<b>306</b>	<b>4</b>	<b>16,883</b>	<b>32,164</b>	<b>40,964</b>		<b>297</b>	<b>2.8</b>	<b>1.5</b>	<b>1.1</b>	<b>14.5</b>	<b>14.0</b>
TROYO	EÜ	46.98	62.06	34%	1,459	306	4.3	16,883	32,164	40,964	297	2.8	1.5	1.1	14.5	14.0	9.5	
<b>Perakende</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>		<b>11,650</b>	<b>6,916</b>	<b>79</b>	<b>12,166</b>	<b>20,242</b>	<b>32,062</b>		<b>3,718</b>	<b>30.8</b>	<b>18.5</b>	<b>11.7</b>	<b>18.6</b>	<b>10.8</b>
BIMAS	EÜ	420.00	494.00	18%	7,918	4,751	44.2	8,157	11,401	18,923	8,851	31.3	22.4	13.5	22.2	13.0	7.8	
MAVI	EÜ	96.55	105.50	9%	1,191	869	10.1											