

Değerleme Tablosu
09/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF			
BIST-100	10,269	Piyasa Değeri (mn)	\$ 444,494
1 Yıl İçin Nom. TL. Hedef	12,346	Halka Açık Piyasa Değeri (mn)	\$ 114,647
Yükseliş Potansiyeli (TL)	20%		

PIYASA ÇARPANLARI (HOLDİNGLER HARİCİ)						
Net Kar	2022	2023	2024T	2023T	Değ.	2024T
	669,588	1008%		975,896	46%	1,086,694
FKK	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	(% Yukseliş Potansiyeli)	Piyasa Deg. (mn \$)	FD Piyasa Deg. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort.Özsem. 2024T	FKK			FD/FAVÖK		
								2022	2023	2024T		2022	2023	2024T	2022	2023	2024T
Bankacılık		Kapanış	Hedef Fiyat	Potansiyel	51,705	14,396	573.8	277,519	339,712	398,545		6.0	4.9	4.2	2.0	1.3	1.1
AKBNK	EP		59.40	80.61	36%	9,590	4,987	124.8	60,024	66,479	74,254	31.2%	5.1	4.6	4.2	2.0	1.5
ALBRK	EÜ		4.95	7.31	48%	384	146	4.0	1,365	3,429	4,385	27.9%	9.1	3.6	2.8	1.5	0.9
GARAN	EP		89.25	114.45	28%	11,639	1,629	66.2	58,509	87,332	98,171	37.7%	6.4	4.3	3.8	2.5	1.5
HALKB	EP		17.29	18.83	9%	3,857	347	38.6	15,266	10,112	11,911	8.9%	8.1	12.3	10.4	1.4	1.0
ISCTR	EÜ		13.69	15.71	15%	10,627	3,294	161.8	61,538	72,265	94,875	34.0%	5.6	4.7	3.6	1.8	1.3
TSKB	EÜ		10.39	14.71	42%	903	352	9.3	4,055	7,041	9,726	37.1%	7.2	4.1	3.0	2.3	1.4
YKBNB	EÜ		20.62	23.76	15%	6,349	381	33.2	24,017	25,046	32,122	17.1%	8.5	8.2	6.4	1.9	1.2
YKBNK	EÜ		31.86	48.44	52%	8,356	3,259	135.9	52,745	68,009	73,091	35.5%	5.1	4.0	3.7	2.1	1.5
Şiğirtacılık		Kapanış	Hedef Fiyat	Potansiyel	4,874	1,180	19.1	2,787	14,624	25,041		56.3	10.7	6.3	9.7	4.4	2.6
AKGRT	EP		8.00	9.13	14%	400	112	5.5	-121	1,185	1,701	41.2%	n.m.	10.9	7.6	6.6	3.9
AGESA	EP		87.40	116.14	33%	488	98	1.9	834	1,374	2,450	61.1%	18.9	11.5	6.4	9.3	5.3
ANSGR	EÜ		95.80	142.82	49%	1,487	521	5.2	1,133	5,909	9,204	48.7%	42.3	8.1	5.2	7.9	3.4
TURSG	EP		69.25	80.50	16%	2,497	450	6.5	941	6,155	11,686	54.8%	85.4	13.1	6.9	12.5	5.2
Banka Dışı		Kapanış	Hedef Fiyat	Potansiyel	19,561	9,511	447	56,428	191,441	107,017	389,878	11.2	3.3	5.9	10.4	6.9	4.9
Havacılık		Kapanış	Hedef Fiyat	Potansiyel	19,561	9,511	447	56,428	191,441	107,017	389,878	11.2	3.3	5.9	10.4	6.9	4.9
PGSUS	EÜ		990.00	1,282.00	29%	3,145	1,352	79.8	7,100	20,908	12,926	84.905	14.3	4.8	7.8	13.2	8.6
TAVHL	EÜ		219.90	300.00	36%	2,480	1,191	22.0	1,899	7,530	5,146	62,227	42.1	10.6	15.5	25.4	14.4
THYAO	EÜ		325.25	458.00	41%	13,936	6,968	344.9	47,429	163,003	89,945	242,746	9.5	2.8	5.0	8.8	6.0
Otomotiv		Kapanış	Hedef Fiyat	Potansiyel	21,723	4,356	145	57,027	93,103	101,348	42,830	12.3	7.5	6.9	10.8	7.4	6.5
DOAS	EP		296.25	405.00	37%	2,024	374	44.1	15,613	19,622	21,585	1,879	4.2	3.3	3.0	5.0	2.7
FROTO	EÜ		1,141.00	1,475.00	29%	12,432	2,238	38.2	27,730	49,056	49,826	60,531	14.4	8.2	8.0	14.4	10.8
TOASO	EÜ		274.00	330.00	20%	4,254	1,021	42.9	9,374	15,083	18,575	-13,025	14.6	9.1	7.4	6.8	6.3
TTRAK	EP		970.00	1,128.00	16%	3,014	723	20.1	4,310	9,342	11,362	-6,553	22.5	10.4	8.5	14.8	6.9
Çimento		Kapanış	Hedef Fiyat	Potansiyel	1,875	608	18	6,012	4,862	8,633	1,440	10.0	12.4	7.0	17.8	8.8	6.4
AKONS	EÜ		152.70	244.60	60%	908	172	5.8	1,935	2,371	4,366	-900	15.1	12.3	6.7	17.5	7.2
CİMSA	EÜ		32.96	50.50	53%	969	435	11.9	4,077	2,491	4,267	2,340	7.6	12.5	7.3	18.0	10.5
Holdingle		Kapanış	Hedef Fiyat	Potansiyel	24,834	7,286	162	112,083	121,737	172,154	-4,484	7.1	6.6	4.6	2.8	4.9	n.a.
KCHOL	EÜ		235.60	244.00	4%	18,551	4,081	88.9	72,662	72,230	112,570	-1,394	8.2	8.3	5.3	3.0	3.5
SAHOL	EÜ		96.35	95.00	-1%	6,283	3,205	73.4	39,421	49,507	59,584	-3,100	5.1	4.1	3.4	2.4	n.a.
Savunma		Kapanış	Hedef Fiyat	Potansiyel	11,065	2,898	99	9,258	25,847	22,625	108.0	38.5	13.8	25.7	21.5	13.2	n.a.
ASELS	EP		63.40	62.45	-1%	8,976	2,334	92.4	1,282	7,290	21,820	13,328	225.5	39.7	13.2	21.6	18.9
OTKAR	EP		560.50	700.00	25%	2,088	564	6.8	2,018	1,968	4,027	9,297	33.3	34.2	16.7	101.2	46.3
Bayaz Eya		Kapanış	Hedef Fiyat	Potansiyel	3,839	576	21.6	6,285	7,667	8,131	60,164	19.7	16.1	15.2	11.8	9.4	6.8
ARCLK	EP		183.00	185.00	1%	3,839	576	21.6	6,285	7,667	8,131	60,164	19.7	16.1	15.2	11.8	9.4
Yiyecek & İçecek		Kapanış	Hedef Fiyat	Potansiyel	11,165	3,260	57	8,110	19,569	33,864	57,898	44.3	18.4	10.6	12.2	6.8	4.5
AEFES	EÜ		200.00	224.00	12%	3,677	1,177	15.0	3,429	7,780	12,236	18,586	34.5	15.2	9.7	7.9	4.5
COLLA	EÜ		738.50	828.00	12%	5,833	1,458	14.2	4,331	8,306	15,849	14,909	43.4	22.6	11.9	19.8	10.7
KRVGD	EP		27.96	29.00	4%	208	58	1.5	408	644	961	2,506	16.4	10.4	7.0	14.7	7.9
TATGD	EP		26.14	40.00	53%	110	45	2.3	295	269	355	2,995	12.1	13.2	10.0	15.7	12.0
ULKER	EP		116.60	89.00	-24%	1,337	521	23.9	-353	2,570	4,463	18,902	n.m.	16.8	9.6	11.3	5.9
Çam		Kapanış	Hedef Fiyat	Potansiyel	4,946	2,423	62	22,739	17,121	25,201	40,422	7.0	9.3	6.3	6.6	10.8	6.4
SISE	EÜ		52.00	70.00	35%	4,946	2,423	62.2	22,739	17,121	25,201	40,422	7.0	9.3	6.3	6.6	10.8
Şağlık		Kapanış	Hedef Fiyat	Potansiyel	1,686	590	5	4,742	4,530	4,551	3,243	11.5	12.0	11.9	13.5	10.0	8.6
MPARK	EÜ		261.00	245.00	-6%	1,686	590	5.1	4,742	4,530	4,551	3,243	11.5	12.0	11.9	13.5	10.0
Madencilik		Kapanış	Hedef Fiyat	Potansiyel	2,281	662	69	4,010	5,912	6,337	-9,561	18.3	12.4	11.6	21.1	22.8	16.0
KOZAL	EP		22.94	22.00	-4%	2,281	662	69.0	4,010	5,912	6,337	-9,561	18.3	12.4	11.6	21.1	22.8
Petrol, gaz		Kapanış	Hedef Fiyat	Potansiyel	14,059	1,174	78	64,597	62,619	56,328	26,308	7.0	7.2	8.0	3.8	4.3	4.8
AKSA	EÜ		116.50	135.34	16%	1,171	433	9.4	4,564	1,652	4,915	154	8.3	22.8	7.7	6.8	9.4
PETKM	EP		20.02	25.96	30%	11,313	5,543	135.3	61,314	53,577	47,144	-62,697	5.9	6.8	7.7	2.9	3.2
TUPRS	EP		189.10	228.71	21%	1,575	740	68.2	-1,281	7,390	4,269	26,154	n.m.	6.9	11.9	135.8	-36.4
GYO		Kapanış	Hedef Fiyat	Potansiyel	1,463	307	4	16,883	32,164	40,964	297	2.8	1.5	1.2	14.5	14.1	9.5
TROYO	EÜ		47.12	62.96	33%	1,463	307	4.2	16,883	32,164	40,964	297	2.8	1.5	1.2	14.5	14.1
Perakende		Kapanış	Hedef Fiyat	Potansiyel	11,870	7,039	79	12,166	20,242	32,062	3,718	31.4	18.9	11.9	19.0	11.0	6.3
BİMAS	EÜ		425.00	494.00	16%	8,013	4,808	44.2	8,157	11,401	18,923	8,851	31.6	22.6	13.6	22.5	13.2
MAVİ	EÜ		97.35	105.50	8%	1,201	877	10.1	1,439	2,887	4,971	-2,586	26.9	13.4	7.8	14.5	7.4
MGRS	EÜ		472.50	521.00	10%	2,656	1,355	24.7	2,570								