

Değerleme Tablosu
10/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF			
BIST-100	10.219	Piyasa Değeri (mn)	\$ 444,490
1 Yıl İçin Nom. TL Hedef	12,463	Halka Açık Piyasa Değeri (mn)	\$ 114,502
Yükseliş Potansiyeli (TL)	22%		

PIYASA GÖRÜMLERİ (HOLDİNGLER HARİCİ)						
Net Kar	2022	2023	2024T	2024T	2024T	2024T
	663,627	994%	978,674	47%	1,105,447	13%
FK	9.6	6.5	5.8			
FD/FAVÖK *	4.5	4.9	5.3			

* FD/FAVÖK sadece sanayi şirketleri için hesaplanmaktadır

Banka	OYAK YATIRIM Tavsiyesi	Cari / Hedef	Fiyat	(% Yukseliş Potansiyeli)	Piyasa Deg. (mn \$)	FD Piyasa Deg. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort.Özsem.	FK			FD/FAVÖK			
								2022	2023	2024T		2022	2023	2024T	2022	2023	2024T	
Bankacılık		Kapanış	Hedef Fiyat	Potansiyel	51,149	14,112	575.4	277,519	339,712	412,709		5.9	4.8	4.0	2.0	1.3	1.1	
AKBNK	EP		57.80	80.61	39%	9,341	4,857	125.3	60,024	66,479	74,254	31.2%	5.0	4.5	4.0	2.0	1.4	1.1
ALBRK	EÜ		5.01	7.31	46%	389	148	4.0	1,365	3,429	4,385	27.9%	9.2	3.7	2.8	1.5	0.9	0.7
GARAN	EP		86.50	114.45	32%	11,291	1,581	65.8	58,509	87,332	98,171	37.7%	6.2	4.2	3.7	2.4	1.5	1.3
HALKB	EP		17.48	18.83	8%	3,903	351	39.9	15,266	10,112	11,911	8.9%	8.2	12.4	10.5	1.4	1.0	0.9
ISCTR	EÜ		13.51	15.71	16%	10,497	3,254	161.7	61,538	72,265	94,875	34.0%	5.5	4.7	3.6	1.8	1.3	1.2
TSKB	EÜ		10.11	14.71	45%	890	343	9.3	4,055	7,041	9,726	37.1%	7.0	4.0	2.9	2.2	1.3	0.9
YAKBN	EÜ		21.76	31.36	44%	6,706	402	33.5	24,017	25,046	46,286	25.4%	9.0	8.6	4.7	2.0	1.3	1.1
YKBNK	EÜ		31.02	48.44	56%	8,143	3,176	136.0	52,745	68,009	73,091	35.5%	5.0	3.9	3.6	2.1	1.5	1.1
Şiğortacılık		Kapanış	Hedef Fiyat	Potansiyel	4,913	1,191	19.2	2,787	14,624	25,041		45.4	10.8	6.3	9.6	4.5	2.7	
AKGRT	EP		7.98	9.13	14%	400	112	5.5	-121	1,185	1,701	41.2%	n.m.	10.9	7.6	6.6	3.9	2.6
AGESA	EP		87.25	116.14	33%	488	98	1.9	834	1,374	2,450	61.1%	18.8	11.4	6.4	9.3	5.3	3.1
ANHYT	EÜ		69.35	118.49	71%	927	158	1.9	1,355	2,778	4,589	56.7%	22.0	10.7	6.5	8.8	4.7	3.0
ANSOR	EÜ		97.10	142.82	47%	1,509	528	5.2	1,133	5,909	9,204	48.7%	42.8	8.2	5.3	8.0	3.4	2.1
TURSG	EP		69.70	80.50	15%	2,516	453	6.6	941	6,155	11,686	54.8%	86.0	13.2	6.9	12.6	5.2	3.0
Banka Dışı		Kapanış	Hedef Fiyat	Potansiyel	19,319	9,387	447	56,428	191,441	107,017	395,224	11.0	3.2	5.8	10.3	6.9	4.8	
Havacılık	EÜ		1,001.00	1,282.00	28%	3,182	1,368	80.2	7,100	20,908	12,926	90,251	14.4	4.9	7.9	13.7	8.9	5.9
PGSUS	EÜ		221.30	300.00	36%	2,498	1,199	22.0	1,899	7,530	5,146	62,227	42.3	10.7	15.6	25.4	14.4	8.2
TAVHL	EÜ		318.00	458.00	44%	13,638	6,819	344.8	47,429	163,003	89,945	242,746	9.3	2.7	4.9	8.7	5.9	4.3
Otomotiv		Kapanış	Hedef Fiyat	Potansiyel	21,846	4,379	145	57,027	93,103	101,348	42,830	12.3	7.5	6.9	10.9	7.4	6.5	
DOAS	EP		297.00	405.00	36%	2,031	376	43.7	15,613	19,622	21,585	1,879	4.2	3.3	3.0	5.0	2.7	2.9
FROTO	EÜ		1,149.00	1,475.00	28%	12,531	2,255	38.1	27,730	49,056	49,826	60,531	14.5	8.2	8.1	14.5	10.9	8.3
TOASO	EÜ		272.75	330.00	21%	4,238	1,017	43.0	9,374	15,083	18,575	-13,025	14.5	9.0	7.3	6.8	6.3	5.9
TTRAK	EP		979.50	1,128.00	15%	3,046	731	19.9	4,310	9,342	11,362	-6,553	22.7	10.5	8.6	18.6	6.9	6.5
Sımento		Kapanış	Hedef Fiyat	Potansiyel	1,807	617	18	6,012	4,862	8,633	1,440	10.2	12.6	7.1	18.0	8.9	6.5	
AKONS	EÜ		155.80	244.00	57%	927	176	5.8	1,935	2,371	4,366	-90	15.4	12.6	6.8	17.9	7.4	5.0
ÇİMSA	EÜ		33.34	50.50	51%	980	441	11.9	4,077	2,491	4,267	2,340	7.7	12.7	7.4	18.2	10.6	8.3
Holdingler		Kapanış	Hedef Fiyat	Potansiyel	25,006	7,332	162	112,083	121,737	172,154	-4,484	7.2	6.6	4.7	2.8	5.0	n.a.	
KCHOL	EÜ		237.20	244.00	3%	18,694	4,113	89.0	72,662	72,230	112,570	-1,384	8.3	8.3	5.3	3.0	3.5	n.a.
SAHOL	EÜ		96.70	95.00	-2%	6,312	3,219	73.5	39,421	49,507	59,584	-3,100	5.2	4.1	3.4	2.4	n.a.	n.a.
Şavınma		Kapanış	Hedef Fiyat	Potansiyel	11,051	2,894	99	3,300	9,258	25,847	24,025	107.8	38.4	13.8	25.7	21.5	13.2	
ASELS	EP		63.40	62.45	-1%	8,985	2,336	92.4	1,282	7,290	21,820	13,328	225.5	39.7	13.2	21.6	18.9	13.3
OTKAR	EP		554.00	700.00	26%	2,066	568	6.8	2,018	1,968	4,027	10,697	32.9	33.8	16.5	102.0	46.7	12.8
Bayaz Eya		Kapanış	Hedef Fiyat	Potansiyel	3,824	574	21.7	6,285	7,667	8,131	60,164	19.6	16.0	15.1	11.8	9.4	6.7	
ARCLK	EP		182.10	185.00	2%	3,824	574	21.7	6,285	7,667	8,131	60,164	19.6	16.0	15.1	11.8	9.4	6.7
Yiyecek & İçecek		Kapanış	Hedef Fiyat	Potansiyel	11,207	3,275	57	8,110	19,569	33,864	57,898	44.5	18.4	10.6	12.2	6.8	4.5	
AEEF	EÜ		199.00	224.00	13%	3,662	1,172	15.0	3,429	7,780	12,236	18,586	34.4	15.1	9.6	7.8	4.5	3.0
CCOLA	EÜ		739.00	828.00	12%	5,842	1,461	14.1	4,331	8,306	15,849	14,909	34.4	22.6	11.9	19.8	10.7	6.6
KRVGD	EP		28.50	29.00	2%	213	60	1.5	408	644	961	2,506	16.8	10.6	7.1	14.9	8.0	a.d.
TATGD	EP		27.00	40.00	48%	114	47	2.3	295	355	2,995	12.4	13.7	10.3	15.9	12.2	7.7	
ULKER	EP		119.90	89.00	-26%	1,376	537	24.0	-353	2,570	4,463	18,902	n.m.	17.2	9.9	11.6	6.0	4.6
Çam		Kapanış	Hedef Fiyat	Potansiyel	5,041	2,470	63	22,739	17,121	25,201	40,422	7.1	9.5	6.4	6.7	11.0	6.4	
SISE	EÜ		52.95	70.00	32%	5,041	2,470	62.8	22,739	17,121	25,201	40,422	7.1	9.5	6.4	6.7	11.0	6.4
Şağık		Kapanış	Hedef Fiyat	Potansiyel	1,726	604	5	4,742	4,530	4,551	3,243	11.7	12.3	12.2	13.8	10.2	8.8	
MPARK	EÜ		267.00	245.00	-8%	1,726	604	5.1	4,742	4,530	4,551	3,243	11.7	12.3	12.2	13.8	10.2	8.8
Madencilik		Kapanış	Hedef Fiyat	Potansiyel	2,186	634	69	-3,305	5,912	6,337	-9,245	n.m.	11.9	11.9	11.2	10.8	21.8	15.3
KOZAL	EP		21.96	22.00	0%	2,186	634	68.6	-3,305	5,912	6,337	-9,245	n.m.	11.9	11.1	10.2	21.8	15.3
Petrol, gaz		Kapanış	Hedef Fiyat	Potansiyel	13,955	1,189	77	64,597	62,619	56,328	26,308	7.0	7.2	8.0	3.8	4.2	4.8	
AKSA	EÜ		119.00	135.34	14%	1,197	443	9.4	4,564	1,652	4,915	154	8.4	23.3	7.8	7.0	9.6	5.4
PETKM	EP		20.16	25.96	29%	1,588	746	68.1	-1,281	7,390	4,269	26,154	n.m.	6.9	12.0	136.4	-36.5	11.5
TUPRS	EP		187.20	228.71	22%	11,210	5,493	134.9	61,314	53,577	47,144	-62,697	5.9	6.7	7.7	2.9	3.1	4.1
GYO		Kapanış	Hedef Fiyat	Potansiyel	1,461	307	4	16,883	32,164	40,964	297	2.8	1.5	1.1	14.5	14.0	9.5	
TRGYO	EÜ		47.00	62.86	34%	1,461	307	4.2	16,883	32,164	40,964	297	2.8	1.5	1.1	14.5	14.0	9.5
Perakende		Kapanış	Hedef Fiyat	Potansiyel	11,931	7,071	79	12,166	20,242	32,062	3,718	31.6	19.0	12.0	19.1	11.1	6.4	
BIMAS	EÜ		424.75	494.00	16%	8,015	4,809	44.1	8,157	11,401	18,923	8,851	31.6	22.6	13.6	22.5	13.2	