

Değerleme Tablosu
13/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF				PIYASA GARPANLARI (HOLDİNGLER HARİCİ)								
BIST-100	10.056	Piyasa Değeri (mn)	\$ 434,288	Net Kar	2022	2023	2024T	2024T	2023T	2024T	2023T	2024T
1 Yıl İçin Nom. TL. Hedef	12.600	Halka Açık Piyasa Değeri (mn)	\$ 112,290	FKK	663,627	994%	978,674	47%	1,102,339	13%	5.7	5.2
Yükseliş Potansiyeli (TL)	25%			FD/FAVÖK *	4.5	6.4	4.9					

* FD/FAVÖK sadece sanayi şirketleri için hesaplanmaktadır

Banka	OYAK YATIRIM Tavsiyesi	Carı / Hedef Fiyat	(% Yükseliş Potansiyeli)	Piyasa Değ. (mn \$)	FD Piyasa Değ. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort. Özsezm. 2024T	FKK			FD/FAVÖK				
							2022	2023	2024T		2022	2023	2024T	2022	2023	2024T		
Bankacılık		Kapanış	Hedef Fiyat	Potansiyel	50,254	13,862	570.2	277,519	339,712	409,601		5.8	4.8	3.9	1.9	1.3	1.1	
AKBNK	EP	56.00	80.61	44%	9,057	4,709	125.7	60,024	66,479	74,254	31.2%	4.9	4.4	3.9	1.9	1.4	1.1	
ALBRK	EÜ	4.84	7.31	51%	376	143	4.0	1,365	3,429	4,395	27.9%	8.9	3.5	2.8	1.5	0.9	0.7	
GARAN	EP	86.20	114.45	33%	11,260	1,576	65.1	58,509	87,332	98,171	37.7%	6.2	4.1	3.7	2.4	1.5	1.3	
HALKB	EP	16.58	18.83	14%	3,705	333	39.9	15,266	10,112	11,911	8.9%	7.8	11.8	10.0	1.3	0.9	0.8	
ISCTR	EÜ	13.39	20.31	52%	10,411	3,227	159.5	61,538	72,265	91,767	32.8%	5.4	4.6	3.6	1.7	1.3	1.1	
TSKB	EÜ	9.95	14.71	48%	866	338	8.9	4,055	7,041	9,726	37.1%	6.9	4.0	2.9	2.2	1.3	0.9	
VAKBN	EÜ	21.14	31.36	48%	6,519	391	32.6	24,017	25,046	46,286	25.4%	8.7	8.4	4.5	2.0	1.2	1.1	
YKBNK	EÜ	30.68	48.44	58%	8,060	3,143	134.5	52,745	68,009	73,091	35.5%	4.9	3.8	3.5	2.1	1.4	1.1	
Şiğortacılık		Kapanış	Hedef Fiyat	Potansiyel	4,880	1,182	19.1	14,624	2,787	25,041		45.0	10.7	6.3	9.6	4.4	2.6	
AKGRT	EP	7.59	9.13	20%	381	107	5.5	-121	1,165	1,701	41.2%	n.m.	10.3	7.2	6.3	3.7	2.5	
AGESA	EP	86.05	116.14	35%	482	96	1.9	834	1,374	2,450	61.1%	18.6	11.3	6.3	9.2	5.2	3.1	
ANHYT	EÜ	68.85	118.49	72%	921	157	2.0	1,355	2,778	4,589	56.7%	21.9	10.7	6.5	8.7	4.7	3.0	
ANSOR	EÜ	96.60	142.82	46%	1,502	526	5.1	1,133	5,909	9,204	48.7%	42.6	8.2	5.2	8.0	3.4	2.0	
TURSG	EP	69.65	80.50	16%	2,516	453	6.6	941	6,155	11,686	54.8%	85.9	13.1	6.9	12.6	5.2	3.0	
Banka Dışı		Kapanış	Hedef Fiyat	Potansiyel	19,087	9,275	445	56,428	191,441	107,017	395,224	10.9	3.2	5.7	10.3	6.9	4.8	
Havacılık		Kapanış	Hedef Fiyat	Potansiyel	19,087	9,275	445	56,428	191,441	107,017	395,224	10.9	3.2	5.7	10.3	6.9	4.8	
PGSUS	EÜ	983.00	1,282.00	30%	3,128	1,345	80.7	7,100	20,908	12,926	90,251	14.2	4.8	7.8	13.5	8.8	5.8	
TAVHL	EÜ	218.80	300.00	37%	2,472	1,187	22.2	1,899	7,530	5,146	62,227	41.9	10.6	15.4	25.3	14.3	8.1	
THYAO	EÜ	314.25	458.00	46%	13,487	6,744	342.6	47,429	163,003	88,945	242,746	9.1	2.7	4.9	8.6	5.9	4.2	
Otomotiv		Kapanış	Hedef Fiyat	Potansiyel	21,751	4,362	144	57,027	93,103	101,348	42,830	12.3	7.5	6.9	10.8	7.4	6.5	
DOAS	EP	288.25	405.00	41%	1,972	365	43.2	15,613	19,622	21,585	1,879	4.1	3.2	2.9	4.8	2.7	2.8	
FROTO	EÜ	1,145.00	1,475.00	29%	12,466	2,249	37.7	27,730	49,056	49,826	60,531	14.5	8.2	8.1	14.5	10.8	8.3	
TOASO	EÜ	274.00	330.00	20%	4,261	1,023	43.2	33.2	9,374	15,083	18,575	-13.025	14.6	9.1	7.4	6.8	6.3	5.9
TTRAK	EP	971.00	1,128.00	16%	3,022	725	19.7	4,310	9,342	11,362	-6,553	22.5	10.4	8.6	18.4	6.9	6.5	
Çimento		Kapanış	Hedef Fiyat	Potansiyel	1,852	598	17	6,012	4,862	8,633	1,440	9.9	12.2	6.9	17.5	8.7	6.3	
AKNSA	EÜ	152.00	244.60	61%	905	172	5.6	1,935	2,371	4,366	-900	15.0	12.3	6.7	17.4	7.2	4.9	
CİMSA	EÜ	32.20	50.50	57%	947	426	11.4	4,077	2,491	4,267	2,340	7.5	12.2	7.1	17.7	10.3	8.1	
Holdingler		Kapanış	Hedef Fiyat	Potansiyel	24,915	7,279	162	112,083	121,737	172,154	-4,494	7.1	6.6	4.7	2.8	4.9	n.a.	
KCHOL	EÜ	237.30	244.00	3%	18,716	4,117	89.3	72,662	72,230	112,570	-1,384	8.3	8.3	5.3	3.0	3.5	n.a.	
SAHOL	EÜ	94.90	95.00	0%	6,199	3,162	73.0	39,421	49,507	59,584	-3,100	5.1	4.0	3.3	2.4	n.a.	n.a.	
Savunma		Kapanış	Hedef Fiyat	Potansiyel	10,779	2,822	97	3,300	9,258	25,847	26,664	105.0	37.4	13.4	25.3	21.2	12.8	
ASELS	EP	62.40	62.45	0%	8,850	2,301	89.9	1,282	7,290	21,820	13,328	22.2	39.0	13.0	21.3	18.7	13.1	
OTKAR	EP	517.00	700.00	35%	1,930	521	7.0	2,018	1,968	4,027	13,336	30.7	31.5	15.4	99.6	45.6	11.7	
Bayaz Eya		Kapanış	Hedef Fiyat	Potansiyel	3,840	576	21.7	6,285	7,667	8,131	60,164	19.6	16.1	15.2	11.8	9.4	6.8	
ARCLK	EP	182.70	185.00	1%	3,840	576	21.7	6,285	7,667	8,131	60,164	19.6	16.1	15.2	11.8	9.4	6.8	
Yıyecek & İçecek		Kapanış	Hedef Fiyat	Potansiyel	11,134	3,251	57	8,110	19,569	33,864	57,898	44.1	18.3	10.6	12.2	6.7	4.5	
AEEFS	EÜ	195.20	224.00	15%	3,595	1,150	15.1	3,429	7,780	12,236	18,586	33.7	14.9	9.4	7.7	4.4	2.9	
CCOLA	EÜ	740.00	828.00	12%	5,854	1,464	14.0	4,331	8,306	15,849	14,909	43.5	22.7	11.9	19.8	10.7	6.6	
KRVGD	EP	27.36	29.00	6%	204	57	1.5	408	644	961	2,506	16.1	10.2	6.8	14.5	7.7	a.d.	
TATGD	EP	25.96	40.00	54%	110	45	2.2	295	269	355	2,995	12.0	13.1	9.9	15.6	12.0	7.5	
ULKER	EP	119.40	89.00	-25%	1,371	535	23.7	-353	2,570	4,463	18,802	n.m.	17.2	9.9	11.5	6.0	4.6	
Çam		Kapanış	Hedef Fiyat	Potansiyel	4,987	2,444	62.5	22,739	17,121	25,201	40,422	7.1	9.4	6.4	6.7	10.9	6.4	
SİSE	EÜ	52.35	70.00	34%	4,987	2,444	62.5	22,739	17,121	25,201	40,422	7.1	9.4	6.4	6.7	10.9	6.4	
Şağık		Kapanış	Hedef Fiyat	Potansiyel	1,734	607	5	4,742	4,530	4,551	3,243	11.8	12.3	12.2	13.8	10.2	8.8	
MPARK	EÜ	268.00	245.00	-9%	1,734	607	5.2	4,742	4,530	4,551	3,243	11.8	12.3	12.2	13.8	10.2	8.8	
Madencilik		Kapanış	Hedef Fiyat	Potansiyel	2,133	619	67	-3,305	5,912	6,337	-9,245	n.m.	11.6	10.8	9.9	21.2	14.8	
KOZAL	EP	21.42	22.00	3%	2,133	619	67.2	-3,305	5,912	6,337	-9,245	n.m.	11.6	10.8	9.9	21.2	14.8	
Petrol, gaz		Kapanış	Hedef Fiyat	Potansiyel	13,808	1,165	76	64,597	62,619	56,328	26,308	6.9	7.1	7.9	3.8	4.2	4.7	
AKSA	EÜ	118.90	135.34	14%	1,197	443	9.6	4,564	1,652	4,915	154	8.4	23.3	7.8	7.0	9.5	5.4	
PETKM	EP	19.50	25.96	33%	1,537	722	66.6	-1,281	7,390	4,269	26,154	n.m.	6.7	11.6	133.5	-35.7	11.2	
TUPRS	EP	184.80	228.71	24%	11,074	5,426	130.9	61,314	53,577	47,144	-62,697	5.8	6.6	7.6	2.9	3.1	4.0	
GYO		Kapanış	Hedef Fiyat	Potansiyel	1,453	305	4	16,883	32,164	40,964	297	2.8	1.5	1.1	14.4	13.9	9.4	
TROYO	EÜ	46.72	62.86	35%	1,453	305	4.2	16,883	32,164	40,964	297	2.8	1.5	1.1	14.4	13.9	9.4	
Ferokende		Kapanış	Hedef Fiyat	Potansiyel	11,891	7,048	80	12,166	20,242	32,062	3,718	31.4	18.9	11.9	19.0	11.0	6.3	
BİMAS	EÜ	426.00	494.00	16%	8,045	4,827	44.6	8,157	11,401	18,923	8,851	31.7	22.7	13.7	22.5	13.2	7.9</	