

Değerleme Tablosu  
14/05/2024

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF			PIYASA GÖRÜNÜMLERİ (HOLDİNGLER HARİCİ)								
BIST-100	10,173	Piyasa Değeri (mn)	\$	439,051	Net Kar	2022	2023	2024T	Değ.	2024T	Değ.
1 Yıl İçin Nom. TL Hedef	12,625	Halka Açık Piyasa Değeri (mn)	\$	113,158	FVK	663,627	994%	979,555	48%	1,102,274	13%
Yükseltilmiş Potansiyeli (TL)	24%				FD/FAVÖK *	9.6	6.5	5.8		5.8	
						4.5	4.9	5.3			

\* FD/FAVÖK sadece sanayi şirketleri için hesaplanmaktadır

Banka	OYAK YATIRIM Tavsiyesi	Cari / Hedef Fiyat	Yükseltilmiş Potansiyeli (TL)	Piyasa Değ. (mn \$)	FD Piyasa Değ. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort.Özsem. 2024T	FVK			FD/FAVÖK			
							2022	2023	2024T		2022	2023	2024T	2022	2023	2024T	
<b>Bankacılık</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>51,203</b>	<b>14,215</b>	<b>571.0</b>	<b>277,519</b>	<b>339,712</b>	<b>409,536</b>		<b>5.9</b>	<b>4.8</b>	<b>4.0</b>	<b>2.0</b>	<b>1.3</b>	<b>1.1</b>
AKBNK	EP	57.50	80.61	40%	9,300	4,836	127.3	60,024	66,479	74,254	31.2%	5.0	4.5	4.0	1.9	1.4	1.1
ALBRK	EÜ	5.09	7.31	44%	396	150	4.0	1,365	3,429	4,395	27.9%	9.3	3.7	2.9	1.6	1.0	0.7
GARAN	EP	90.00	114.45	27%	11,758	1,646	65.1	58,509	87,332	98,171	37.7%	6.5	4.3	3.9	2.5	1.5	1.4
HALKB	EP	16.36	22.59	38%	3,656	329	40.2	15,266	10,112	11,846	8.8%	7.7	11.6	9.9	1.3	0.9	0.8
ISCTR	EÜ	13.57	20.31	50%	10,552	3,271	158.3	61,538	72,265	91,767	32.8%	5.5	4.7	3.7	1.8	1.3	1.2
TSKB	EÜ	10.01	14.71	47%	872	340	8.8	4,055	7,041	9,726	37.1%	6.9	4.0	2.9	2.2	1.3	0.9
YAKBN	EÜ	20.42	31.36	54%	6,298	378	32.6	24,017	25,046	46,286	25.4%	8.4	8.1	4.4	1.9	1.2	1.0
YKBNK	EÜ	31.86	48.44	52%	8,371	3,265	134.7	52,745	68,009	73,091	35.5%	5.1	4.0	3.7	2.1	1.5	1.2
<b>Sigortacılık</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>4,856</b>	<b>1,178</b>	<b>19.1</b>	<b>2,787</b>	<b>14,624</b>	<b>25,041</b>		<b>44.7</b>	<b>10.7</b>	<b>6.3</b>	<b>9.5</b>	<b>4.4</b>	<b>2.6</b>
AKGRT	EP	7.54	9.13	21%	378	106	5.5	-121	1,185	1,701	41.2%	n.m.	10.3	7.1	6.2	3.7	2.4
AGESA	EP	88.55	116.14	31%	496	99	1.9	834	1,374	2,450	61.1%	19.1	11.6	6.5	9.4	5.4	3.1
ANHYT	EÜ	68.00	118.49	74%	909	155	2.0	1,355	2,778	4,589	56.7%	21.6	10.5	6.4	8.6	4.6	3.0
ANSOR	EÜ	96.80	142.82	48%	1,505	527	5.1	1,133	5,909	9,204	48.7%	42.7	8.2	5.3	8.0	3.4	2.1
TURSG	EP	68.55	80.50	17%	2,477	446	6.6	941	6,155	11,686	54.8%	64.6	12.9	6.8	12.4	5.2	2.9
<b>Banka Dışı</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>19,017</b>	<b>9,236</b>	<b>443</b>	<b>56,428</b>	<b>191,441</b>	<b>107,017</b>	<b>395,224</b>	<b>10.8</b>	<b>3.2</b>	<b>5.7</b>	<b>10.2</b>	<b>6.9</b>	<b>4.8</b>
Havacılık	EÜ	204.00	262.00	28%	3,173	1,364	79.9	7,100	20,908	12,926	90,251	14.4	4.9	7.9	13.6	8.9	5.9
PGSUS	EÜ	223.60	300.00	34%	2,527	1,213	21.8	1,899	7,530	5,146	62,227	42.8	10.8	15.8	25.6	14.5	8.2
TAVHL	EÜ	310.25	458.00	48%	13,317	6,659	341.6	47,429	163,003	89,945	242,746	9.0	2.6	4.8	8.5	5.8	4.2
THYAO	EÜ																
<b>Otomotiv</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>22,215</b>	<b>4,447</b>	<b>144</b>	<b>57,027</b>	<b>93,103</b>	<b>101,348</b>	<b>42,830</b>	<b>12.5</b>	<b>7.7</b>	<b>7.0</b>	<b>11.0</b>	<b>7.6</b>	<b>6.6</b>
DOAS	EP	287.00	405.00	41%	1,964	363	43.1	15,613	19,622	21,585	1,879	4.0	3.2	2.9	4.8	2.7	2.8
FROTO	EÜ	1,186.00	1,475.00	24%	12,945	2,330	37.9	27,730	49,056	49,826	60,531	15.0	8.5	8.4	14.9	11.2	8.5
TOASO	EÜ	272.75	330.00	21%	4,242	1,018	43.2	9,374	15,083	18,575	-13,025	14.5	9.0	7.3	6.8	6.3	5.9
TTRAK	EP	984.50	1,128.00	14%	3,064	735	19.7	4,310	9,342	11,362	-6,553	22.9	10.5	8.7	18.7	7.0	6.6
<b>Çimento</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>1,832</b>	<b>592</b>	<b>17</b>	<b>6,012</b>	<b>4,862</b>	<b>8,633</b>	<b>1,440</b>	<b>9.8</b>	<b>12.1</b>	<b>6.8</b>	<b>17.4</b>	<b>8.6</b>	<b>6.2</b>
AKONC	EÜ	149.90	244.60	63%	893	170	5.5	1,935	2,371	4,366	-90	14.8	12.1	6.6	17.2	7.1	4.8
ÇİMSA	EÜ	31.94	50.50	58%	939	423	11.3	4,077	2,491	4,267	2,340	7.4	12.1	7.1	17.5	10.2	8.1
<b>Holdingler</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>25,892</b>	<b>7,566</b>	<b>163</b>	<b>112,083</b>	<b>121,737</b>	<b>172,154</b>	<b>-4,494</b>	<b>7.4</b>	<b>6.8</b>	<b>4.8</b>	<b>2.8</b>	<b>5.1</b>	<b>n.a.</b>
KCHOL	EÜ	246.50	244.00	-1%	19,443	4,278	90.0	72,662	72,230	112,570	-1,384	8.6	8.7	5.6	3.0	3.6	n.a.
SAHOL	EÜ	98.70	95.00	-4%	6,448	3,289	73.5	39,421	49,507	59,584	-3,100	5.3	4.2	3.5	2.4	n.a.	n.a.
<b>Savunma</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>10,654</b>	<b>2,790</b>	<b>97</b>	<b>3,300</b>	<b>9,258</b>	<b>25,847</b>	<b>26,664</b>	<b>103.8</b>	<b>37.0</b>	<b>13.3</b>	<b>25.0</b>	<b>20.9</b>	<b>12.7</b>
AESLS	EP	60.85	62.45	3%	8,631	2,244	89.7	1,282	7,290	21,820	13,328	216.4	38.1	12.7	20.8	18.2	12.8
OTKAR	EP	542.00	700.00	29%	2,023	546	7.1	2,018	1,968	4,027	13,336	32.2	33.0	16.2	103.6	47.4	12.1
<b>Bayaz Eya</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>3,901</b>	<b>585</b>	<b>21.7</b>	<b>6,285</b>	<b>7,667</b>	<b>8,131</b>	<b>60,164</b>	<b>20.0</b>	<b>16.4</b>	<b>15.4</b>	<b>11.9</b>	<b>9.5</b>	<b>6.8</b>
ARCLK	EP	185.60	185.00	0%	3,901	585	21.7	6,285	7,667	8,131	60,164	20.0	16.4	15.4	11.9	9.5	6.8
<b>Yiyecek &amp; İçecek</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>11,034</b>	<b>3,225</b>	<b>56</b>	<b>19,569</b>	<b>19,569</b>	<b>33,864</b>	<b>57,898</b>	<b>43.7</b>	<b>18.1</b>	<b>10.5</b>	<b>12.1</b>	<b>6.7</b>	<b>4.4</b>
AEFES	EÜ	197.40	224.00	13%	3,636	1,163	15.1	3,429	7,780	12,236	18,586	34.1	15.0	9.6	7.8	4.4	3.0
COLLA	EÜ	725.00	828.00	14%	5,736	1,434	13.9	4,331	8,306	15,849	14,909	42.6	22.2	11.6	19.5	10.5	6.5
KRVGD	EP	27.90	29.00	4%	208	58	1.5	408	644	961	2,506	16.4	10.4	7.0	14.7	7.9	a.d.
TATGD	EP	26.58	40.00	50%	112	46	2.2	295	355	2,995	12.3	13.4	10.2	15.8	12.1	7.6	
ULKER	EP	116.80	89.00	-24%	1,342	523	23.4	-353	2,570	4,463	18,902	n.m.	16.8	9.7	11.3	5.9	4.5
<b>Çam</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>5,036</b>	<b>2,467</b>	<b>62</b>	<b>22,739</b>	<b>17,121</b>	<b>25,201</b>	<b>40,422</b>	<b>7.1</b>	<b>9.5</b>	<b>6.4</b>	<b>6.7</b>	<b>11.0</b>	<b>6.4</b>
SISE	EÜ	52.85	70.00	32%	5,036	2,467	61.9	22,739	17,121	25,201	40,422	7.1	9.5	6.4	6.7	11.0	6.4
<b>Sağlık</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>1,705</b>	<b>597</b>	<b>5</b>	<b>4,742</b>	<b>4,530</b>	<b>4,551</b>	<b>3,243</b>	<b>11.6</b>	<b>12.1</b>	<b>12.0</b>	<b>13.6</b>	<b>10.1</b>	<b>8.6</b>
MPARK	EÜ	263.50	245.00	-7%	1,705	597	5.2	4,742	4,530	4,551	3,243	11.6	12.1	12.0	13.6	10.1	8.6
<b>Madencilik</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>2,102</b>	<b>610</b>	<b>67</b>	<b>-3,305</b>	<b>5,912</b>	<b>6,337</b>	<b>-9,245</b>	<b>n.m.</b>	<b>11.4</b>	<b>10.7</b>	<b>9.7</b>	<b>20.8</b>	<b>14.6</b>
KOZAL	EP	21.10	22.00	4%	2,102	610	67.2	-3,305	5,912	6,337	-9,245	n.m.	11.4	10.7	9.7	20.8	14.6
<b>Petrol, gaz</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>13,792</b>	<b>1,188</b>	<b>75</b>	<b>64,597</b>	<b>62,619</b>	<b>56,328</b>	<b>26,308</b>	<b>6.9</b>	<b>7.1</b>	<b>7.9</b>	<b>3.7</b>	<b>4.2</b>	<b>4.7</b>
AKSA	EÜ	122.10	135.34	11%	1,230	455	9.7	4,564	1,652	4,915	154	8.7	23.9	8.0	7.2	9.8	5.5
PETKM	EP	19.78	25.96	31%	1,559	733	65.6	-1,281	7,390	4,269	26,154	n.m.	6.8	11.7	134.7	-36.1	11.3
TUPRS	EP	183.60	228.71	25%	11,004	5,392	129.7	61,314	53,577	47,144	-62,897	5.8	6.6	7.5	2.8	3.0	4.0
GYO		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>1,385</b>	<b>291</b>	<b>4</b>	<b>16,883</b>	<b>32,164</b>	<b>40,964</b>	<b>297</b>	<b>2.6</b>	<b>1.4</b>	<b>1.1</b>	<b>13.8</b>	<b>13.3</b>	<b>9.0</b>
TRGYO	EÜ	44.54	62.86	41%	1,385	291	4.2	16,883	32,164	40,964	297	2.6	1.4	1.1	13.8	13.3	9.0
<b>Pirakende</b>		<b>Kapanış</b>	<b>Hedef Fiyat</b>	<b>Potansiyel</b>	<b>12,389</b>	<b>7,347</b>	<b>81</b>	<b>12,166</b>	<b>21,124</b>	<b>32,062</b>	<b>10,217</b>	<b>32.7</b>	<b>18.9</b>	<b>12.4</b>	<b>20.1</b>	<b>11.5</b>	<b>6.7</b>
BIMAS	EÜ	455.75	494.00	8%	8,608	5,165	45.6	8,157	12,283	18,923	15,350	33.9	22.5	14.6	24.6	13.9	8.6
MAVI	EÜ	93.50	105.50	13%	1,155	843	10.2	1,439	2,887	4,971	-2,586	2					