

Değerleme Tablosu
19/06/2023

OYAK YATIRIM

PIYASA VERİLERİ & HEDEF			
BIST-100	5,269	Piyasa Değeri (mn)	\$ 243,469
1 Yıl İçin Nom. TL Hedef	6,692	Halka Açık Piyasa Değeri (mn)	\$ 72,729
Yükseliş Potansiyeli (TL)	27%		

PIYASA CARPANLARI (HOLDİNGLER HARİCİ)						
Net Kar	2021	Değ.	2022T	Değ.	2023T	Değ.
	186,282	179%	679,632	265%	602,950	-11%
	F1K	17.0	4.7		5.2	
F0/FAFÖK *	9.0	3.6		4.4		
* F0/FAFÖK sadece sanayi şirketleri için hesaplanmaktadır						

Banka	Oyak Tavsiyesi	Carı / Hedef		(%) Yükseliş Potansiyeli	Piyasa Değ. (mn \$)	FD Piyasa Değ. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Ort.Özsem. 2021	F/K			F/D		
		Fiyat (TL)	Hedef Fiyat					2021	2022	2023T		2021	2022	2023T	2021	2022	2023T
Bankacılık		Kapanış	Hedef Fiyat	Potansiyel	27,650	6,728	519.8	56,561	277,007	213,486		11.6	2.4	3.1	1.6	0.8	0.7
AKBNK	EÜ	18.51	26.68	44%	4,072	2,117	118.6	12,126	60,024	45,950	52.3%	7.9	1.6	2.1	1.3	0.6	0.5
ALBRK	EÜ	2.78	3.50	26%	294	112	7.2	104	1,365	1,148	21.4%	66.6	5.1	6.1	1.5	0.9	0.7
GARAN	EÜ	29.42	43.47	48%	5,227	732	86.9	13,601	58,509	45,331	50.3%	9.1	2.1	2.7	1.5	0.8	0.8
HALKB	EP	12.22	12.10	-1%	3,714	334	29.2	1,508	14,754	12,777	22.1%	58.2	6.0	6.9	2.0	1.0	0.9
ISCTR	EÜ	12.88	15.17	18%	5,449	1,689	134.2	13,468	61,538	40,236	44.2%	9.6	2.1	3.2	1.5	0.7	0.8
TSKB	EÜ	4.21	5.95	41%	499	194	13.1	1,089	4,055	3,988	41.1%	10.8	2.9	3.0	1.7	0.9	0.8
VAKBN	EÜ	9.63	12.69	32%	4,040	242	25.7	4,175	24,017	20,195	30.2%	22.9	4.0	4.7	1.8	0.9	0.8
YKBNK	EÜ	12.19	16.43	35%	4,356	1,307	104.9	10,490	52,745	43,861	55.6%	9.8	2.0	2.3	1.6	0.8	0.6
Sigortacılık		Kapanış	Hedef Fiyat	Potansiyel	1,352	328	6.8	2,218	2,787	4,121		14.4	11.5	7.8	3.4	2.0	1.7
AKGRT	EÜ	3.27	5.25	61%	223	62	3.6	189	-121	805	-8.1%	27.8	-43.5	6.5	5.0	2.7	1.9
AGESA	EÜ	34.50	59.86	73%	263	53	1.6	448	834	967	64.8%	13.9	7.4	6.4	7.0	3.7	2.7
ANSGR	EÜ	15.86	25.20	59%	335	117	0.3	522	1,133	905	24.5%	15.2	7.0	8.8	2.5	1.3	1.2
TURSG	EÜ	10.80	17.80	65%	531	96	1.2	1,058	941	1,444	17.7%	11.9	13.3	8.7	3.0	2.0	1.6
Banka Dışı	Oyak Tavsiyesi	Carı / Hedef	Fiyat (TL)	(%) Yükseliş Potansiyeli	Piyasa Değ. (mn \$)	FD Piyasa Değ. (mn \$)	Günlük Ort. İşim. Hac. (mn \$)	Net Kar (TL mn)			Net Borç ¹ (TL mn)	F/K			F/D		
Havacılık		Kapanış	Hedef Fiyat	Potansiyel	13,896	6,750	322	6,709	56,428	54,462	260,349	49.0	5.8	6.0	18.5	6.0	4.6
PGSUS	EÜ	567.20	644.00	14%	2,455	1,055	40.5	-1,972	7,100	8,749	50,513	-29.5	8.2	6.6	47.8	7.7	5.2
TAHVL	EÜ	83.50	117.00	40%	1,283	616	17.0	468	1,899	3,261	36,166	-13.3	16.0	9.3	42.4	11.9	7.3
THYAO	EÜ	174.00	189.00	9%	10,158	5,079	264.3	8,213	47,429	42,452	173,670	-43.0	5.1	5.7	14.8	5.3	4.2
Otomotiv		Kapanış	Hedef Fiyat	Potansiyel	17,060	3,435	129	15,736	37,971	49,010	16,223	51.7	10.6	8.2	21.7	9.9	7.0
DOAS	EÜ	145.00	224.00	54%	1,349	250	16.5	2,332	7,824	9,225	872	30.8	4.1	3.5	13.8	4.2	2.9
PROTO	EÜ	657.00	722.10	10%	9,753	1,756	45.1	8,801	18,614	25,911	24,378	55.0	12.4	8.9	26.9	12.9	8.5
TOASO	EÜ	212.00	293.74	39%	4,484	1,076	60.3	3,281	8,562	10,006	-7,687	59.4	12.4	10.6	17.0	8.7	7.1
TTRAK	EÜ	348.00	414.77	19%	1,473	354	7.5	1,322	2,971	3,868	-1,340	44.8	11.7	9.0	19.3	9.8	6.9
Çimento		Kapanış	Hedef Fiyat	Potansiyel	1,298	416	16	1,320	4,952	2,444	1,798	105.5	6.2	12.6	31.3	12.8	9.6
AKCNS	EP	79.70	75.00	-6%	645	123	5.2	304	1,521	1,391	701	132.6	10.0	11.0	39.4	11.9	7.1
CIMSA	EP	114.20	109.00	-5%	653	294	11.1	1,017	3,432	1,052	1,097	87.8	4.5	14.7	26.2	13.7	14.1
Kimyasallar		Kapanış	Hedef Fiyat	Potansiyel	425	152	5	461	1,079	1,148	-703	14.5	3.8	3.6	9.4	3.2	3.0
ALKIM	EP	27.34	30.00	10%	173	75	2.6	248	572	547	-288	20.6	7.2	7.5	15.1	5.1	6.5
KLKIM	EÜ	51.70	68.01	32%	252	75	2.5	213	507	601	-415	70.8	11.7	9.9	35.2	12.4	7.9
Holdingler		Kapanış	Hedef Fiyat	Potansiyel	13,855	4,036	175	28,500	125,075	99,350	-4,484	22.1	2.6	3.3	n.m.	n.m.	n.m.
ALARK	EÜ	68.10	110.00	62%	1,253	326	19.8	1,274	11,441	8,510	-2,225	36.9	2.6	3.5	n.m.	n.m.	n.m.
KCHOL	EÜ	95.05	121.32	28%	10,197	2,243	108.7	15,193	69,806	58,640	-1,384	26.0	3.5	4.1	n.m.	n.m.	n.m.
SAHOL	EÜ	42.38	55.00	30%	3,658	1,792	66.2	12,032	43,828	32,200	-3,100	18.1	2.0	2.7	n.m.	n.m.	n.m.
İnşaat & Taahhüt		Kapanış	Hedef Fiyat	Potansiyel	7,332	1,097	69	6,102	5,744	14,337	-46,697	38.5	30.2	12.1	17.0	7.7	8.4
ENKAI	EP	26.50	28.00	6%	6,726	807	53.1	5,159	1,961	12,040	-45,173	35.3	81.1	13.2	16.9	8.2	9.1
TKFEN	EP	33.52	31.52	-6%	525	252	14.6	839	3,473	1,953	-1,592	-206.3	3.6	6.4	16.9	4.4	4.9
Savunma		Kapanış	Hedef Fiyat	Potansiyel	5,691	1,489	97	8,172	13,155	14,051	12,806	26.5	10.2	9.6	23.0	13.8	10.0
ASELS	EP	49.50	58.68	19%	4,774	1,241	92.6	7,131	11,916	12,349	6,394	25.4	9.5	9.1	21.7	12.6	9.9
OTKAR	EP	180.60	271.50	50%	917	248	4.0	1,042	1,239	1,702	6,413	35.1	17.5	12.7	30.8	22.6	10.5
Beyaz Eya		Kapanış	Hedef Fiyat	Potansiyel	3,039	456	27.8	3,065	4,325	5,821	32,529	25.2	16.6	12.3	15.6	9.0	5.4
ARCLK	EP	106.30	129.20	22%	3,039	456	27.8	3,065	4,325	5,821	32,529	25.2	16.6	12.3	15.6	9.0	5.4
Enerji		Kapanış	Hedef Fiyat	Potansiyel	4,045	1,070	65	3,915	21,522	11,343	46,664	69.0	4.4	8.4	12.1	5.4	3.8
AKSEN	EP	29.58	34.17	16%	1,535	322	14.4	1,680	4,562	4,311	6,491	77.2	8.0	8.4	18.0	7.0	5.7
ENJSA	EP	30.18	35.00	16%	1,508	302	18.3	2,282	14,498	4,461	8,184	32.8	2.5	8.0	8.2	5.1	3.0
ZOREN	EP	2.87	6.96	143%	607	158	12.1	-86	111	283	29,826	193.4	128.9	50.7	11.9	5.4	3.5
Yiyecek & İçecek		Kapanış	Hedef Fiyat	Potansiyel	5,014	1,461	34	3,232	8,110	14,943	43,381	34.7	14.6	7.9	11.3	4.7	3.4
AEFES	EÜ	63.85	105.00	64%	1,599	512	10.7	1,068	3,429	4,900	16,191	46.4	11.0	7.7	7.7	3.1	2.3
CCOLA	EÜ	243.70	327.00	34%	2,622	656	9.3	2,271	4,331	7,134	8,143	50.3	14.3	8.7	15.1	6.8	4.6
KRVGD	EP	16.74	21.50	28%	170	48	1.3	133	408	610	1,453	32.9	9.8	6.6	26.0	8.7	a.d.
TATOD	EP	25.30	32.00	26%	146	60	2.1	223	295	424	2,255	20.6	11.7	8.1	37.7	13.6	9.4
ULKER	EP	32.96	45.00	37%	477	186	11.0	-464	-353	1,875	15,339	10.4	-31.9	6.0	11.4	4.9	3.4
Çam		Kapanış	Hedef Fiyat	Potansiyel	5,240	2,568	96	9,040	19,345	22,356	22,618	57.9	6.4	5.5	21.8	8.1	5.5
SISE	EÜ	40.44	54.00	34%	5,240	2,568	96.1	9,040	19,345	22,356	22,618	57.9	6.4	5.5	21.8	8.1	5.5
Sağlık		Kapanış	Hedef Fiyat	Potansiyel	649	227	3	290	1,619	1,676	2,449	236.3	9.5	9.2	13.2	7.6	5.1
MPARK	EÜ	73.75	98.45	33%	649	227	3.2	290	1,619	1,676	2,449	236.3	9.5	9.2	13.2	7.6	5.1
Mobilya		Kapanış	Hedef Fiyat	Potansiyel	180	97	2	256	514	756	1,402	25.0	8.3	5.6	13.1	6.4	4.1
YATAS	EÜ	28.38	45.36	60%	180	97	2.5	256	514	756	1,402	25.0	8.3	5.6	13.1	6.4	4.1
BT	EÜ	Kapanış	Hedef Fiyat	Potansiyel	174	106	1	403	552	673	-1,934	28.8	7.5	6.1	5.6	2.2	1.8
İNDES	EÜ	18.41	30.98	68%	174	106	1.5	403	552	673	-1,934	28.8	7.5	6.1	5.6	2.2	1.8
Madencilik		Kapanış	Hedef Fiyat	Potansiyel	2,796	811	124	3,004	4,010	5,412	-10,478	36.5	16.5	12.2	25.7	18.4	10.9
KOZAL	EA	20.64	15.20	-26%	2,796	811	123.8	3,004	4,010	5,412	-10,478	36.5	16.5	12.2	25.7	18.4	10.9
Petroil, gaz		Kapanış	Hedef Fiyat	Potansiyel	9,005	4,084	143	10,784	55,780	40,943	8,421	-214.9	3.8	5.2	10.1	3.5	3.7
AKSA	EP	64.15	87.24	36%	879	325	6.2	1,167	3,422	2,413	350	47.2	6.1	8.6	12.4	5.4	5.6
AYGAZ	EÜ	83.30	80.00	-4%	775	186	2.2	670	4,733	3,075	301	-7,356	3.9	6.0	26.7	35.0	22.4
TUPRS	EÜ	71.90	109.00	52%	5,861	2,872	90.3	3,495	41,045	31,159	-8,608	-55.6	3.4	4.4	9.7	2.4	2.6
PETKM	EA	13.91	10.66	-23%	1,491	701	44.7	5,452	6,580	4,296	16,378	32.4	5.4	8.2	8.5	15.2	14.5
GYO		Kapanış	Hedef Fiyat	Potansiyel	673	141	3	6,462	6,880	8,607	2,804	29.8	3.5	2.9	11.6	7.0	4.9
TRGYO	EÜ	15.92	22.85	44%	673	141	2.5	5,746	6,247	7,072	2,804	54.2	2.5	2.3	17.3	13.4	10.1
BASGZ	EÜ	12.49	29.98	140%	370	55	2.8	717	733	1,535	-4,029	16.4	11.9	5.7	5.1	2.4	1.6
Perakende		Kapanış	Hedef Fiyat	Potansiyel	6,565	3,870	76	3,692	12,167	15,881	9,185	70.3	12.8	8.8	15.6	8.1	5.0
BİNAS	EÜ	174.90	228.00	30%	4,493	2,696	54.8	2,932	8,157	10,102	10,515	40.7	13.0	10.5	17.7	9.8	6.2