



2021 10 27

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S0350520050002
wujs01@ghzq.com.cn
S0350120080069
heh@ghzq.com.cn

2021Q3

+IDM

688396

:

2021 2021 69.28 (+41.70%) 16.84 (+145.20%) 2021Q3
24.73 +35.43% +2.60%
6.16 (+117.26% -7.73%)

300

■ 2021Q3

IDM

2021Q3

1M 3M 12M
-10.7% -32.0% 23.7%
300 0.4% 3.1% 4.2%

37.86% +8.35pct +1.59pct
24.60% +7.57pct -2.78pct 2021Q3
6.02% +0.55pct +3.48pct
1.53% -0.09pct +0.09pct
6.35% +0.36pct +2.35pct -1.86%
+0.29pct +1.04pct

2021/10/27

52

46.11-104.47

82,030.51

26,925.09

132,009.19

43,329.72

2,952.81

%

0.00

■

12

2021Q3

2.20

+52.60%

MOSFET

1 MOSFET

MOSFET

300

2 IGBT

IGBT

IGBT

3

650V SiC JBS

2021H1

*

*

2021-08-20

2020

IDM

*

*

2021-01-20

IDM
MOSFET IGBT

5G

1.78/2.08/2.33 /
”

23.49/27.46/30.80
PE

2021-2023
EPS
39/34/30

“



	2020	2021E	2022E	2023E
	6977	9321	10899	12310
	21	34	17	13
	964	2349	2746	3080
	140	144	17	12
	0.73	1.78	2.08	2.33
ROE(%)	9	18	18	16

Wind

	688396		62.14			2021/10/27			
	2020A	2021E	2022E	2023E		2020A	2021E	2022E	2023E
ROE	9%	18%	18%	16%	EPS	0.73	1.78	2.08	2.33
	27%	36%	34%	34%	BVPS	8.02	9.80	11.88	14.21
	5%	6%	5%	5%					

5

2

2020 5

2018

2019
2020 8
2021

2021

2021

LED PCB

,

300
300
300

300 20%
300 10% 20%
300 -10% 10%
300 10%

