

2023 04 29

		2023/4/28
()		57.25
()		66.08/44.18
()		755.75
()		755.75
()		13.20
()		13.20
3	(%)	31.89

	14692	16649	19138	21554	24540		9249	10060	12566	14430	16306
	11246	12700	15863	18216	20584		5982	6367	8129	9359	10579
	1151	1298	0	0	0		85	95	101	115	122
	15	22	24	29	31		131	168	188	193	222
	37	61	62	79	80		441	548	628	717	835
	1548	1876	2496	2538	3152		713	921	1131	1198	1158
	694	692	692	692	692		-141	-301	-331	-396	-483
	7500	9809	10568	11238	12174		18	-84	15	7	0
	1365	1498	1632	1765	1898		184	118	120	120	120
	4481	4760	5416	6123	6684		0	125	0	0	0
	349	498	491	484	485		112	85	25	15	23
	1305	3053	3028	2865	3106		1	5	2	2	2
	22191	26458	29706	32792	36714		2351	2537	2903	3416	4039
	4311	4469	5014	5005	5239		5	121	44	46	54
	81	0	1983	1200	1653		2	5	3	3	3
	1317	1344	0	0	0		2354	2653	2943	3459	4089
	2913	3125	3032	3805	3586		96	54	127	149	176
	379	1294	1179	1049	920		2258	2599	2816	3311	3913
	66	927	813	683	553		-10	-18	-28	-33	0
	313	367	367	367	367		2268	2617	2845	3344	3913
	4691	5762	6194	6054	6159	EBITDA	2817	3226	3566	4293	5155
	211	715	687	654	654	EPS()	1.72	1.98	2.15	2.53	2.96
	1218	1218	1218	1218	1218						
	13731	13840	13840	13840	13840						
	1966	4583	7225	10337	14041						
	17290	19981	22825	26084	29902	(%)	32.6	8.8	24.9	14.8	13.0
	22191	26458	29706	32792	36714	(%)	119.3	7.9	14.4	17.7	18.2
						(%)	135.3	15.4	8.7	17.5	17.0
						(%)	35.3	36.7	35.3	35.1	35.1
						(%)	24.4	25.8	22.4	22.9	24.0
						ROE(%)	12.9	12.6	12.0	12.4	12.8
						ROIC(%)	37.5	35.9	31.6	37.8	36.6
	3454	3058	2506	4804	4077						
	2258	2599	2816	3311	3913						
	791	894	955	1215	1532	(%)	21.1	21.8	20.9	18.5	16.8
	-141	-301	-331	-396	-483	(%)	-57.3	-55.6	-53.9	-59.5	-58.7
	-112	-85	-25	-15	-23		3.4	3.7	3.8	4.3	4.7
	444	-324	-927	664	-880		3.0	3.3	3.3	3.8	4.1
	214	276	18	26	18						
	-1902	-2056	-1687	-1868	-2443		0.5	0.4	0.4	0.5	0.5
	1266	2135	1580	1752	2336		9.6	9.9	0.0	0.0	0.0
	-1282	-239	-133	-133	-133		5.6	6.1	16.2	0.0	0.0
	646	318	27	17	26						
	2889	290	362	200	281	()	1.72	1.98	2.15	2.53	2.96
	75	-81	1983	-783	453	()	2.62	2.32	1.90	3.64	3.09
	-1376	861	-114	-130	-129	()	13.10	15.14	17.29	19.76	22.65
	88	0	0	0	0						
	4313	109	0	0	0	P/E	33.3	28.9	26.6	22.6	19.3
	-211	-598	-1507	1113	-43	P/B	4.4	3.8	3.3	2.9	2.5
	4400	1456	1181	3136	1915	EV/EBITDA	21.2	18.3	16.2	12.7	10.2

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C4 C5

C4 C5

	Buy	20%
	outperform	5% 20%
	Neutral	5% 5%
	underperform	5%
	overweight	
	Neutral	
	underperform	
300	6~12	A
	500	

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