

2023 08 31

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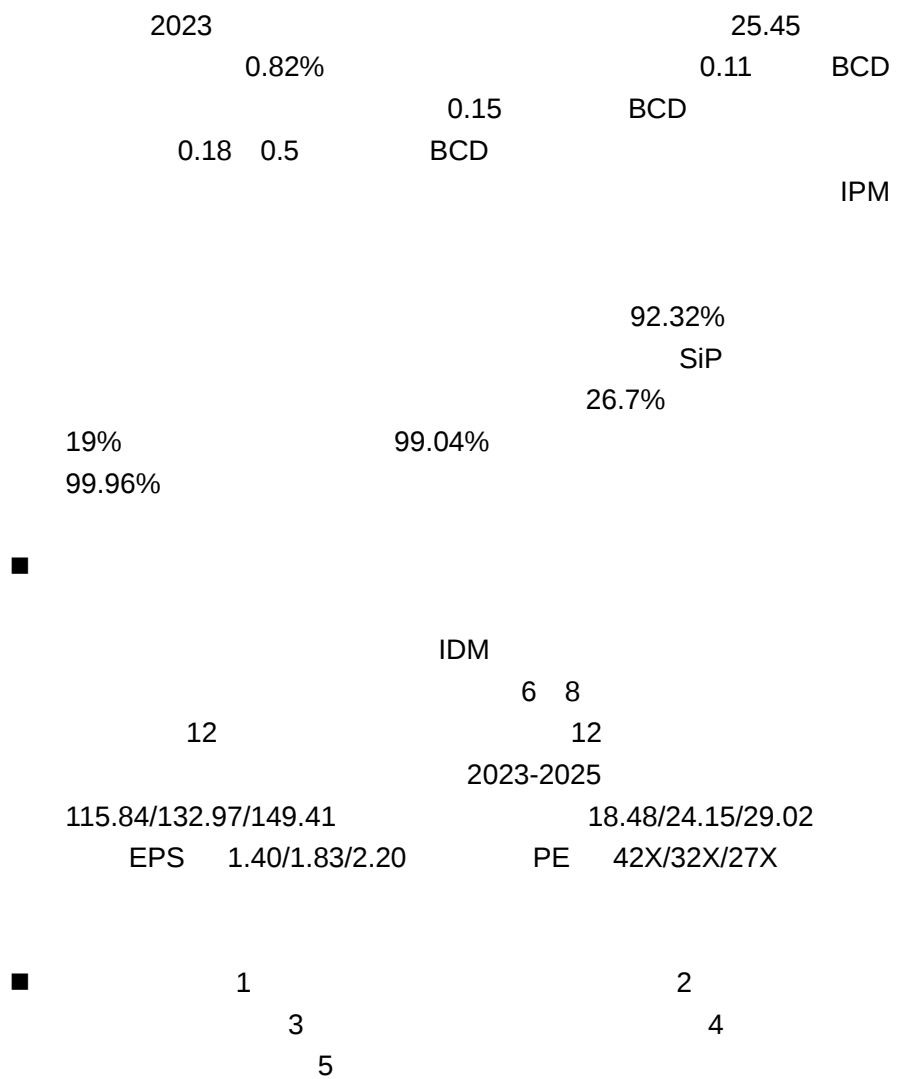
S0350522100001
gexf@ghzq.com.cn

gaoly01@ghzq.com.cn

IGBT&SiC

688396

				:						
				2023	8	30	2023	2023		
				50.30		2.25%		34.30%		
				3.17pct	7.78		42.57%	7.32		
				43.97%						
				12						
				2023Q2	26.83		1.97%			
				14.36%	33.85%	4.54pct	0.95pct			
				3.98	45.93%	4.74%				
300	2023/08/31			3.96	43.91%	17.86%				
	1M	3M	12M							
	2.1%	-1.2%	12.1%							
300	-6.2%	-0.9%	-7.7%	:						
				■						
				2023/08/31	39%	2023				
				58.53	23.95	4.73%				
52	44.18-66.08			2						
				77,264.98						
				77,264.98						
				132,009.19						
				132,009.19						
				282.05						
				%	0.37					



	2022A	2023E	2024E	2025E
	10060	11584	13297	14941
	9	15	15	12
	2617	1848	2415	2902
	15	-29	31	20
	1.98	1.40	1.83	2.20
ROE(%)	13	8	10	11
P/E	26.56	41.81	32.00	26.62
P/B	3.48	3.55	3.20	2.85
P/S	6.91	6.67	5.81	5.17
EV/EBITDA	19.69	25.49	20.34	17.04

Wind

688396					58.53				2023/08/31
	2022A	2023E	2024E	2025E		2022A	2023E	2024E	2025E
ROE	13%	8%	10%	11%	EPS	1.98	1.40	1.83	2.20
	37%	34%	35%	34%	BVPS	15.14	16.48	18.31	20.50
	4%	5%	5%	5%					
	26%	16%	18%	19%	P/E	26.56	41.81	32.00	26.62
					P/B	3.48	3.55	3.20	2.85
	9%	15%	15%	12%	P/S	6.91	6.67	5.81	5.17
	15%	-29%	31%	20%					
						2022A	2023E	2024E	2025E
	0.41	0.42	0.44	0.44		10060	11584	13297	14941
	9.85	9.75	9.70	9.68		6367	7607	8651	9830
	3.72	3.83	3.84	3.80		95	110	125	141
						168	209	239	247
	22%	21%	21%	21%		548	788	811	792
	3.73	3.31	3.21	3.19		-301	-367	-325	-360
	3.27	2.84	2.74	2.72		921	1390	1396	1419
						2537	1963	2557	3062
	2022A	2023E	2024E	2025E		116	9	11	7
	12700	11301	12493	14176		2653	1972	2569	3069

2 TMT 2022 2022 2021

2 2023

300

300

300

300 20%

300 10% 20%

300 -10% 10%

300 10%

