

個股焦點

PLX



PLX - 有關撤資的信息將成為短期驅動因素

Mã CP	Tên công ty	Sàn GD
PLX	Petrolimex	HOSE
VN30 ETF FTSE ETF FUBON		
STOCK RATING 81	ĐIỂM CƠ BẢN 79	SỨC MẠNH GIÁ 83
Xu hướng ngắn hạn		Ngày 06/02/2023
Khuyến nghị	買進	Giá đóng cửa 38,800

短期阻力關卡: 42.50

短期支撐關卡: 35.70

短期趨勢 (5-10 天): 上漲

中期阻力關卡: 45.80

中期支撐關卡: 33.05

中期趨勢 (1-3 月): 上漲

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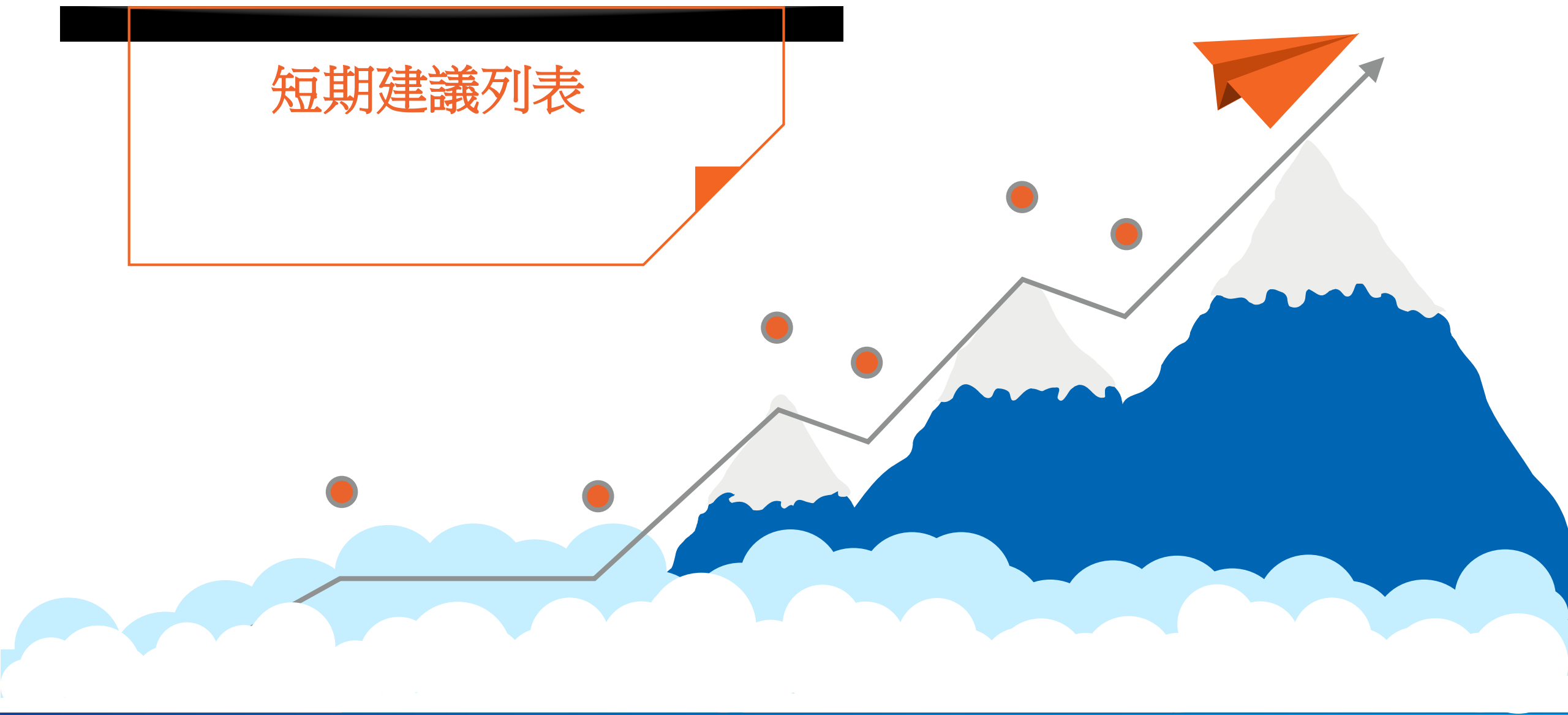
- PLX 在 2022 年第四季度的收入為 78 兆 4,110 億越南盾，同比增長 59%，稅後利潤為 1 兆 4,120 億越南盾，同比增長 102%。2022 年全年，PLX 的收入達到 3,041.88 億越南盾，同比增長 80%，稅後利潤達到 1 兆 9,130 億越南盾，同比下降 39%，分別完成收入和稅後利潤目標的 164% 和 74%。
- 2022 年的收入強勁增長得益於同期國內汽油價格大幅上漲。然而，隨著 2022 年的回報率下降至 4.1%（同期為 7.5%），稅後利潤大幅下降，這主要是由於 Nghi Son 煉油廠（NSR）在前 6 個月意外供應中斷，導致 PLX 不得不以較低的價格進口石油成本價較高，PLX 在 2022 年前 3 季度受到影響。
- 我們預計 PLX 的 2023 年業務業績將更加積極復甦，這要歸功於：1) 石油需求的復甦與經濟同步；2) NSR 已復甦正常運營，幫助 PLX 的 2022 年第四季度業績復甦可觀，我們預計 2023 年的利潤將復甦正常；3) 預計汽油價格在 2023 年將保持穩定，不會大幅下跌，因此 PLX 將不再需要像 2022 年那樣計提庫存。
- 此外，支持股價的信息是，PLX 的董事會剛批准一項計劃，以不低於 21,300 越南盾，或者 PGB 在 30 個交易日平均價的價格撤資 1.2 億 PGB 股（即 40% 股權）。因此，總剝離價值預計不會低於 2 兆 5,560 億越南盾。
- 此外，政府正在討論修改關於石油貿易的第 83 和 95 號法令草案，內容是減少國家干預，穩定國內石油供應的目標。我們相信這些新規定將使 PLX 更容易管理庫存和銷售價格以提高利潤率。
- 以當前收盤價計算，PLX 的 TTM 市盈率為 31.1 倍（相當於 TTM EPS 為 1,165 越南盾）。PLX 的股票評級為 81 點，因此我們將該股票評級為積極。
- PLX 的價格走勢圖收盤上漲 4%，交易量強勁增加至 20 日均線以上。同時，價格走勢圖仍處於短期調整階段，因此我們認為價格走勢圖可能無法完全突破 38.70 的阻力位，投資者應限制追漲。此外，PLX 的短期趨勢也調整至上漲。因此，我們建議短期投資者可以考慮以現價買進。

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股票代碼	PLX
建議價格	38.80
目前價格	38.80
短期趨勢	上漲
中期趨勢	上漲
短期目標	42.31
與目前價格相比的短期上漲空間	9.05%
短期停損	35.70
Reward/ Risk	2.18
預期持有 (盤)	21
最佳分配比例	11.97%
建議	買進



短期建議列表



短期建議列表

股碼	股價	短期趨勢	中期趨勢	建議買進日期	T+交易	短期買進價格	Stop loss	報酬%	建議
BID	45.00	上漲	上漲	28/10/2022	T+72	34.55	42.79	30.25%	持有
STB	25.70	上漲	上漲	25/11/2022	T+52	18.20	25.44	41.21%	持有
VIB	23.65	上漲	中性	09/01/2023	T+21	20.60	22.55	14.81%	持有
VCB	96.00	上漲	上漲	10/01/2023	T+20	86.90	87.37	10.47%	持有
GMD	56.20	上漲	上漲	18/01/2023	T+14	48.00	50.78	17.08%	持有
GAS	106.00	上漲	下跌	30/01/2023	T+6	108.20	103.28	-2.03%	持有
REE	72.90	上漲	上漲	31/01/2023	T+5	73.50	70.22	-0.82%	持有
SBT	15.60	上漲	上漲	01/02/2023	T+4	14.75	14.71	5.76%	持有
PLX	38.80	上漲	上漲	07/02/2023	T+0	38.80	35.70	0.00%	買進

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