

個股焦點

PVP



PVP – 原油價格預期仍維持高位

STOCK RATING

84

ĐIỂM CƠ BẢN

81

SỨC MẠNH GIÁ

86

Xu hướng ngắn hạn



Ngày
30/07/2024

Khuyến nghị

買進

Giá hiện tại

16,500

+1,050 / +6.80%

短期阻力關卡: 16.74

短期支撐關卡: 14.62

短期趨勢(5-10天): 上漲

中期阻力關卡: 16.74

中期支撐關卡: 14.53

中期趨勢(1-3月): 下跌

PVP – 原油價格預期仍維持高位

- PVP 在 2024 年第二季度的收入達到 3,600 億越南盾 (-0.1% YoY)，稅後利潤達到 630 億越南盾 (+17% YoY)。2024 年首 6 個月累計，收入達 7,330 億越南盾 (+10% YoY)，稅後利潤達到 1,090 億越南盾 (+8% YoY)。
- 儘管 2024 年第二季度的收入持平 YoY，但由於船舶運價上漲和PVP推動船舶在國際市場以優於國內的價格運營，利潤正增長。因此，回報率增加至 26.0%（同期為16.8%）。
- 雖然由於購買了一艘新船 Pacific Era，PVP 借了 1,680 萬美元，利率採用 SOFR（錨定於美聯儲利率），所以 PVP 並沒有在國內利率下降時受益。因此，由於利息支出增長 97% YoY 以及美元/越南盾上漲時的匯率損失，2024 年第二季度的財務費用增長 215% YoY。然而，PVP 透過提高運價促進了太平洋船隊在國際市場的開拓，足以創造利潤空間和現金流來抵消這些增加的財務成本。鑑於目前營運現金流為正（CFO），我們認為 PVP 可以在未來的 12 個月內還清這筆貸款。
- 我們預計國際原油運價將繼續錨定在高位，這主要得益於：1) 油價預計將繼續錨定在高位；2) 油輪供應量尚未能增加以滿足國際油氣運輸市場的需求。
- 以目前收盤價計算，PVP 的 TTM 本益比為 8.9 倍（相當於 TTM EPS 1,853 越南盾）。PVP 的股票評級收在 84 點，因此我們對該股的增長評級位積極。
- PVP 的價格走勢圖收盤上漲 7%，交易量比 20 日均線的交易量突然增加。同時，價格走勢圖出現出進入積極劇烈波動時期的跡象，顯示價格走勢圖可能會快速在未來的幾個交易日完全突破 16.74 的阻力位。另外，PVP 的短期走勢也調整至上漲。因此，我們建議投資者考慮以當前價格買進。

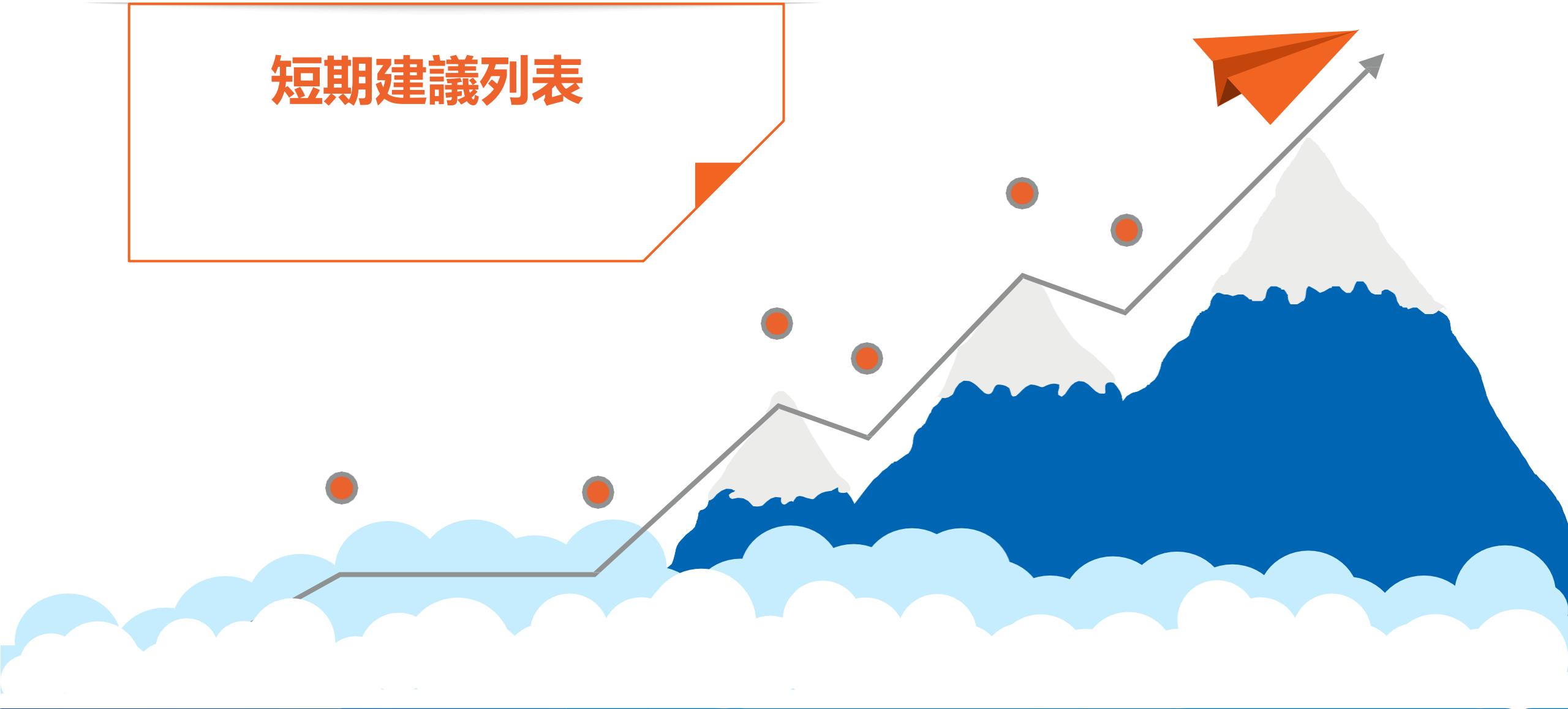
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股票代碼	PVP
建議價格	16.50
目前價格	16.50
短期趨勢	上漲
中期趨勢	上漲
短期目標	19.61
與目前價格相比的短期上漲空間	18.84%
短期停損	14.98
Reward/ Risk	2.83
預期持有 (盤)	16
最佳分配比例	4.80%
建議	買進



源: YSVN

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
DHT	71.20	上漲	上漲	01/04/2024	T+87	26.90	65.72	164.68%	限制新買
NTP	62.50	上漲	上漲	11/07/2024	T+14	57.80	56.29	8.13%	特有
ACV	118.00	上漲	下跌	30/07/2024	T+1	117.50	107.43	0.43%	特有
PVP	16.50	上漲	上漲	31/07/2024	T+0	16.50	14.98	0.00%	買進

VNSmallcaps 股票列表顯示信號

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%	短期目標價	信號
TDM	49.00	上漲	上漲	02/05/2024	T+64	51.30	48.73	-4.48%	59.90	特有
TTA	10.85	上漲	上漲	29/07/2024	T+2	10.80	9.82	0.46%	11.38	特有
BFC	48.70	上漲	上漲	30/07/2024	T+1	47.60	44.71	2.31%	52.89	限制新買
SAV	24.00	上漲	上漲	31/07/2024	T+0	24.00	20.52	0.00%	27.40	買進

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