

2008 5 28 ()
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(021240)

BUY ()

(008000,)	가	40%,	가	7.4%
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- : 200 2% .
-10 2008 0.5% 5
40 , 30 .
- : . 2010
- 가 : 가 가
- 가 : 가 ,
가 .

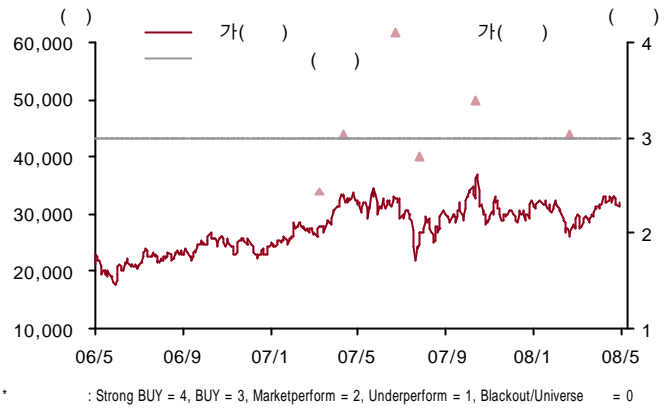
가(5/28)	31,350
가	44,000
가	2.4
	372
	40.4%
가	
1	: 0.6%
3	: 0.3%
6	: 8.4%
가	
1	: 2%
3	: -4.8%
6	: 11.7%
1	가

	EPS	EPS	PER*	PBR	EV/ EBITDA	ROIC	ROE						
()	()	()	()	()	()	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
12/06A	1,117.8	112.3	102.4	74.9	1,039	1,043	29.2 - 16.9	4.9	8.0	14.7	19.2	1.6	21.0
12/07A	1,213.1	161.3	155.7	116.3	1,562	1,512	24.3 - 14.6	5.2	7.8	22.4	24.0	2.6	15.7
12/08F	1,317.7	192.1	175.0	130.8	1,757	1,771	17.7	4.5	7.5	22.5	23.2	3.0	18.7
12/09F	1,418.3	212.9	202.4	151.8	2,039	2,039	15.4	3.8	7.0	21.4	23.7	3.3	19.9
12/10F	1,519.4	236.2	224.3	168.3	2,261	2,261	13.9	3.3	6.5	20.8	23.1	3.7	19.0

$$\text{EPS} = \frac{\text{가} - [\text{가} \times (1 - \text{PER}^*)]}{\text{가}}$$

가 (2)

		가 ()
07/4/6	BUY	34,000
07/5/9	BUY	44,000
07/8/23	BUY	40,000
07/11/9	BUY	50,000
08/3/19	BUY	44,000



1% 가

Strong BUY():	6	30%
BUY():	6	10~30%
Marketperform():	6	-10~10%
Underperform():	6	10% 가
Overweight():	가	6 10%
Neutral():	가	6 -10~10%
Underweight():	가	6 10%

가

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가 가 가