

688396 2022 2023

❖	2023 4 27	2022	2023	
❖	1 2022	100.60	+8.77%	36.71%
	+1.38pct	26.17	+15.40%	22.52
	+7.30%			
❖	2 2023Q1	23.46	/ -6.67%/-3.38%	
	34.80%	/ -1.71pct/+0.13pct	3.80	/
	-38.59%/-32.07%	3.36	/ -44.00%/-13.72%	

❖	" IDM + "			2023Q1
	IDM			
	23.46	/ -6.67%/-3.38%	34.80%	/
	-1.71pct/+0.13pct	3.80	/ -38.59%/-32.07%	

35% IGBT

❖				-100V	1500V
				MOSFET	

❖	12	+	3	12	2022
	2023		2023		
	MOSFET		8	IGBT	
	GaN SiC				

❖	" IDM+ "			IGBT
			2023-2024	
	29.72/34.41	27.71/32.92	2025	39.18
	EPS	2.10/2.49/2.97	" "	

	2022A	2023E	2024E	2025E
()	10,060	11,998	14,375	16,677
(%)	8.8%	19.3%	19.8%	16.0%
()	2,617	2,771	3,292	3,918
(%)	15.4%	5.9%	18.8%	19.0%
()	1.98	2.10	2.49	2.97
()	29	27	23	19
()	3.8	3.3	2.9	2.5

2023 4 28

57.25

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()	132,009.19
()	132,009.19
()	755.75
()	755.75
(%)	23.16
()	15.45
12	/ 64.49/44.69

(12)



688396 2022

688396 2022 2022-10-27

688396 2022

688396 2021 2022-08-22

688396 2021

2022

688396 2021 2022-04-24

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2022A	2023E	2024E	2025E
12,700	15,822	17,566	20,868
212	357	415	420
1,086	1,155	1,339	1,515
61	74	83	93
1,877	2,035	2,789	3,020

2022A	2023E	2024E	2025E
10,060	11,998	14,375	16,677
6,367	7,806	9,382	10,866
95	108	121	134
168	191	208	239
548	584	639	694

			2019
	2016		2017
3		2020	
2019			
2021			
2021			
1	2022		
2022			
7	9	2022	



(300)

6	20%		
6	10%	20%	
6		-10%	10%
6	10%	20%	
3-6			5%
3-6			-5% 5%
3-6			5%

"

"

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