

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

2022-04-24

N€

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
<b>10,060</b>	<b>11,998</b>	<b>14,375</b>	<b>16,677</b>
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%

"

"

"

