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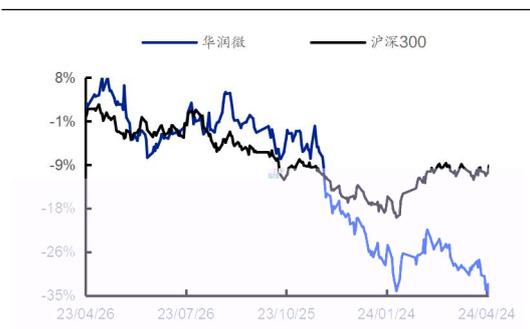
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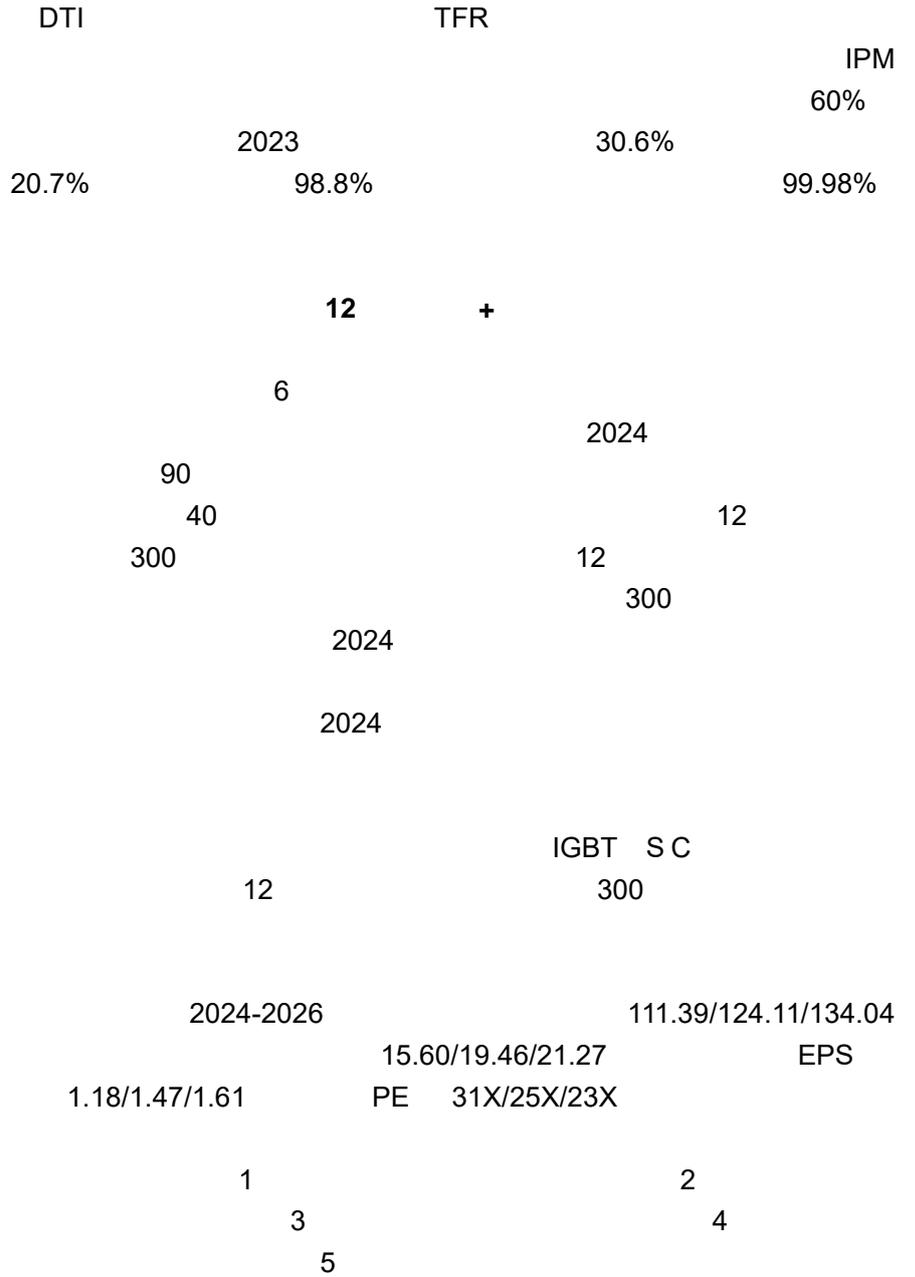
688396 2023

2024Q1



	300			2024/04/26
	1M	3M	12M	
	-8.8%	-12.6%	-35.1%	
300	1.1%	7.5%	-9.5%	

	2024/04/26
	36.16
52	34.23-61.50
	47,858.37
	47,858.37
	132,351.70
	132,351.70
	313.99



	2023A	2024E	2025E	2026E
	9901	11139	12411	13404
(%)	-2	13	11	8
	1479	1560	1946	2127
(%)	-43	5	25	9
	1.12	1.18	1.47	1.61
ROE(%)	7	7	8	8
P/E	39.88	30.68	24.60	22.50
P/B	2.74	2.06	1.90	1.75
P/S	5.96	4.30	3.86	3.57
EV/EBITDA	19.76	15.19	13.44	12.31

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		688396				36.16				2024/04/26			
		2023A	2024E	2025E	2026E			2023A	2024E	2025E	2026E		
ROE		7%	7%	8%	8%	EPS		1.12	1.18	1.47	1.61		
		32%	34%	34%	34%	BVPS		16.33	17.57	19.04	20.65		
		6%	5%	5%	6%								
		15%	14%	16%	16%	P/E		39.88	30.68	24.60	22.50		
						P/B		2.74	2.06	1.90	1.75		
		-2%	13%	11%	8%	P/S		5.96	4.30	3.86	3.57		
		-43%	5%	25%	9%								
								2023A	2024E	2025E	2026E		
		0.36	0.36	0.37	0.37			9901	11139	12411	13404		
		8.51	8.80	9.02	8.79			6710	7391	8168	8887		
	3.49	3.61	3.63	3.59			84	100	110	118			
							167	201	236	241			
	19%	22%	22%	21%			655	724	807	871			
	3.77	3.06	2.81	2.66			-245	-338	-364	-350			
	3.29	2.66	2.41	2.25			1154	1381	1489	1474			
							1667	1782	2095	2294			
	2023A	2024E	2025E	2026E			20	17	10	11			
	11799	12690	12212	11944			1687	1799	2105	2306			
	1554	1584	1799	1958			249	270	211	231			
	1966	2128	2374	2578			1438	1529	1895	2075			
	789	794	914	984			-41	-31	-51	-52			
	16107	17196	17299	17464			1479	1560	1946	2127			
	6541	7271	8070	8859									
	765	732	623	424			2023A	2024E	2025E	2026E			
	1880	1661	1745	1797			1738	2765	2890	3134			
	3922	5373	6929	8595			1479	1560	1946	2127			
	29215	32234	34666	37140			-41	-31	-51	-52			
	22	22	22	22			1004	988	1062	1125			
	1182	1442	1564	1690			7	0	0	0			
	0	0	0	0			-741	268	-44	-34			
	3063	4155	4571	4843			-6405	-2888	-3353	-3387			
	4268	5620	6158	6556			-5193	-1784	-1850	-1803			
	907	907	907	907			-85	-1449	-1553	-1643			
	410	406	406	406			-1127	346	50	59			
	1317	1312	1312	1312			3651	1011	-14	-14			
	5585	6933	7470	7868			1013	887	0	0			
	1218	1221	1221	1221			1623	138	0	0			
	23630	25302	27196	29271			1015	-14	-14	-14			
	29215	32234	34666	37140			-963	891	-478	-268			

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, ,

300
300
300

300	20%		
300	10%	20%	
300	-10%	10%	
300	10%		

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