

(000507)

2020 11 24

6000

12000

A

8.4 /

5.83

000507

6.8/4.69

53.78

48.62

841.20

EPS

EPS

100%

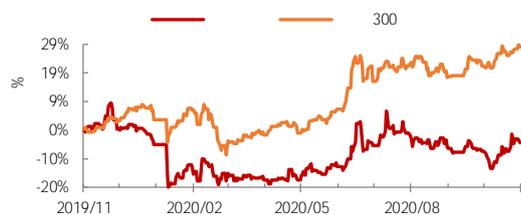
11 20

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100%



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1. 000507 03 2020. 11. 01
2. 000507 2020. 08. 29
3. 2020. 04. 29

2020-22

EPS 0.26/ 0.30/

EPS 11

2020-22 PE

2.39/2.78/2.95

0.32

25 5.83 /

22.74/19.53/18.37 " "

	2018A	2019A	2020E	2021E	2022E
()	2,615	3,322	3,833	4,539	5,195
YoY %	33.4%	27.0%	15.4%	18.4%	14.5%
()	169	222	239	278	295
YoY %	19.5%	31.5%	7.5%	16.4%	6.3%
%	19.2%	15.9%	17.3%	17.4%	17.2%
	0.18	0.24	0.26	0.30	0.32
ROE	5.9%	4.3%	4.4%	5.0%	5.1%
	32.14	24.44	22.74	19.53	18.37

	2019A	2020E	2021E	2022E		2019A	2020E	2021E	2022E
	3,322	3,833	4,539	5,195		247	266	309	329
YoY (%)	27.0%	15.4%	18.4%	14.5%		192	180	180	180
	2,794	3,172	3,751	4,303		-104	1,536	78	77
	17	20	24	27		305	1,992	590	603
	95	110	130	149		-547	-2,145	305	6
	192	222	263	301		-100	0	0	0
	102	134	178	193		-784	-2,025	455	146
	0	0	0	0		1,030	0	0	0
	157	120	150	140		1,223	2,380	0	0
	289	311	361	384					

CPA

“ ”