2019 04 19

/

(300130)

——2019

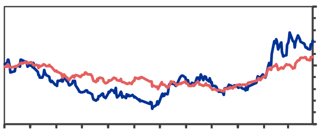
2019 04 18

	17.65
/	18.89/9.02
	4.2
/	1.13
A	5912
/	3250.20/10287.67

" "

: 2018 09 30

	4.2
%	46.22
/ A	478/335
B /H	-/-



300130 2018

2019/03/05

300130

2018/12/07

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- IPO A 2018 89.29%
- 2019 3 21 2019 5808.83 -6081.12 540%-570% 440% 2 2019 2 2.7
- 2019

  2019
- 5000 1 19.0 / 2019 3 31 98.4 0.21% 16.9 / 10.91 / 1304
- 2018-2020 23.12 26.88 33.80 2.31 3.24 3.79 2019 26

	2017	18Q1-Q3	2018E	2019E	2020E
	1,237	1,523	2,312	2,688	3,380
%	9.80	103.39	86.90	16.30	25.70
	72	121	231	324	379
%	-48.26	156.01	220.83	40.20	16.90
/	0.27	0.25	0.48	0.68	0.79
%	38.7	32.9	43.2	44.0	44.0
ROE %	3.6	6.0	10.4	13.0	13.4
	65		37	26	22

" " ; " " ROE

	2015A	2016A	2017A	2018E	2019E	2020E
	978	1,127	1,237	2,312	2,688	3,380
yoy	44.14%	15.24%	9.80%	86.90%	16.30%	25.70%
	609	637	758	1,313	1,505	1,893
%	37.74%	43.48%	38.69%	43.20%	44.00%	44.00%
	9	13	14	23	26	34
	360	477	465	976	1,157	1,453
%	36.84%	42.35%	37.58%	42.21%	43.04%	42.99%
	108	125	114	247	278	359
	212	267	261	486	555	710
	5	35	29	38	34	37
	35	50	61	205	290	347
yoy	-15.09%	40.96%	22.90%	235.07%	41.46%	19.66%
%	3.61%	4.42%	4.95%	8.87%	10.79%	10.27%
	10	37	30	13	4	2
	4	46	0	0	1	1
	30	59	95	192	287	346
	58	76	-2	45	50	56
	87	135	93	237	337	402
	1	-9	22	2	3	5
	86	144	72	235	334	397
	1	5	0	4	10	18
	85	139	72	231	324	379
yoy	7.43%	62.61%	-48.26%	220.83%	40.20%	16.90%
	231	235	265			

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6

Buy	20	
Outperform	5	20
(Neutral)	5	5
(Underperform)	5	

6

Overweight

(Neutral)