

688396.SH 2021 3

68.95



分析师：刘凯

执业证书编号：S0930517100002

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()	13.20
()	910.20

+

2021

+

MOSFET

23.33 26.52 29.79

2021-2023

PE 39x 34x 31x

1

	2019	2020	2021E	2022E	2023E
	5,742.78	6,977.26	9,674.90	11,359.26	13,024.09
	-8.42%	21.50%	38.66%	17.41%	14.66%
	400.76	963.66	2,333.01	2,652.61	2,978.86
	-6.68%	140.46%	142.10%	13.70%	12.30%
EPS	0.48	0.85	1.77	2.01	2.26
ROE)	7.39%	9.11%	18.18%	17.26%	16.36%
P/E	143	81	39	34	31
P/B	10.5	7.4	7.1	5.9	5.0
Wind	2021-10-25	2019//2020/2021		8.30/11.30/13.20	

6-12		15%		
6-12		5%	15%	
6-12			-5%	5%
6-12		5%	15%	
6-12		15%		
A	300			

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