300130

2015

010-59312839 021-38677516

fujian@gtjas.com wangzhe016158@gtjas.com

S0880515040001 S0880515110001

38

38

97756.64 44.14%

8549.59 7.43%

2016-2017 EPS 0.50/0.65 2018 EPS 0.80

2016-2018 33.6%/30.6%/22.8%

d

2016.04.20

300130

	2014A	2015A	2016E	2017E	2018E
	678	**978**	**1,312**	**1,742**	**2,357**
	389	609	818	1,088	1,470
	5	9	12	16	21
	98	108	145	193	261
	157	212	284	377	510
EBIT	**29**	**40**	**53**	**69**	**94**
	0	0	0	0	0
	3	4	4	4	4
	-13	5	-2	-22	-31

38.00

35.00

31.05

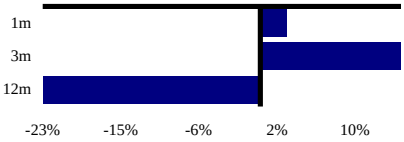
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POS

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%



52 16.00-155.60

7,098