

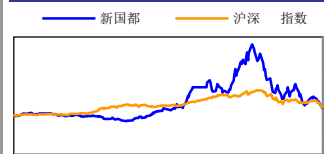
2015 08 25

(300130)

	2015	08	24
			22.49
/			155.6/22.49
			4.4
/			0.22
A			3315
/	3209.91	/	10970.29

“ ”

	2015	06	30
			5.15
%			24.33
/ A			229/147
B /H			-/-



300130
2015/06/29
(300130)
252
2015/06/11

(8621)23297818×7391



●	2015	3.43						
	22.58%	3702	24.56%	7	10			
	20%	3520	24.33%	7	10			
●		3.43	22.6%					
		68%						
●		38.0%	2014	44%				
	2013	39.1%	46%					
●		“	”					
	2015	1	27	6				
	10							
●								
●	2015	2017	100%					
	30%							
	2015-2017	0.88	1.12	1.43	EPS	0.39	0.49	0.63
	2014			”	“			

	2014	2015H1	2015E	2016E	2017E
	678	343	903	1,133	1,436
%	35.86	22.58	33.15	25.47	26.74
	80	35	88	112	143
%	44.85	-24.33	10.58	27.27	27.68
/	0.70	0.15	0.39	0.49	0.63
%	42.7	38.2	41.4	41.3	41.1
ROE %	7.0	3.0	7.3	8.6	10.1
	32		58	46	36

“ ”

; “ ”

ROE

	2014A	2015E	2016E	2017E
	678	903	1,133	1,436
	645	833	1,038	1,306
	389	529	665	846
	5	7	9	11
	98	126	159	201
	157	187	213	257
	(13)	(13)	(12)	(12)
	8	(4)	4	2
	0	0	0	0
	3	1	1	1
	36	71	96	131
	42	37	37	37
	77	108	133	168
	(2)	10	17	18
	80	98	116	150
	(0)	10	4	7
	80	88	112	143

EPS

,