东兴证券
DONGXINGSECURITIES

2019

15

2018

19.78

GE Healthcare

http://www.hibor.com.cn

1. 3
2. 4
3. 7
3.1 7
3.2 8
4. 10
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1.

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20 30

2019 15
3-5% 42 47%
MarketsandMarketsTM 2018 19.78
1.12

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3.

3.1

GE Healthcare

1-3

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	√	√	√	√	√	√
				√	√	
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						√

3.2

82%

4

2008 5G

, 70%

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				2020
	2018.01.11		2450	
	2018.01.11		2450	
	2018.03.24	10000t/a		

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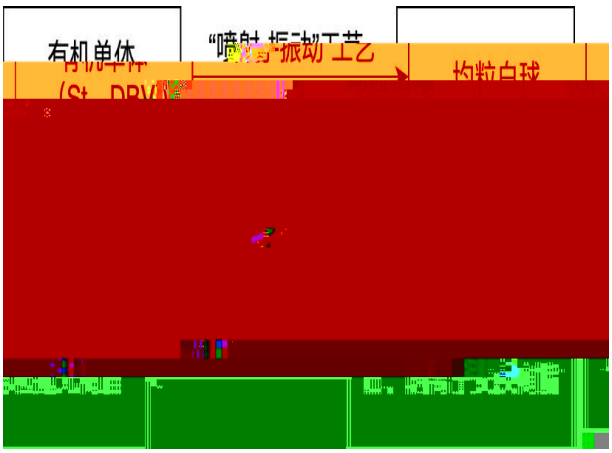
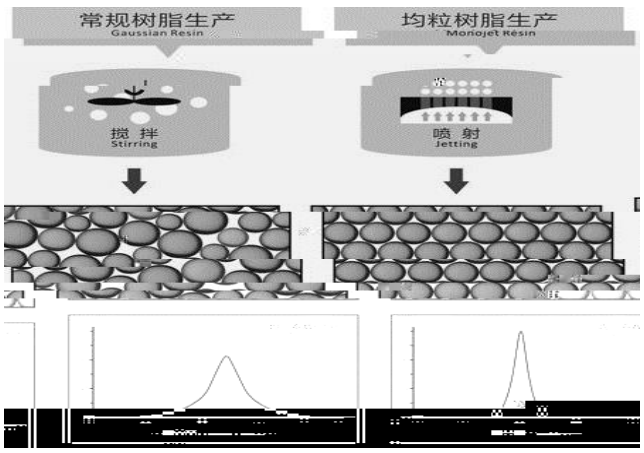
PPB

PPB PPT

2020

16,970 80.14%





4.

2017 2019

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21-23 12.48/15.50/20.20
3.12/4.10/5.73 54.49%31.42%/39.70% 21-23 EPS 1.42/1. 87/2.61
PE 52.0/39.6/28.3 6

“ ”

	2018	2019	2020A	2021E	2022E	2023E
	470	539	591	816	1044	1305
		15%	*10%*	*38%*	*28%*	*25%*
	155	469	297	380	428	600
		202%	*-37%*			

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5.

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2017 2020 wind 5

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