

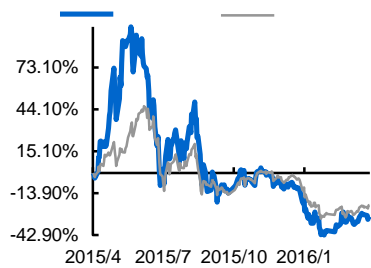
6		21.00
04 01		11.59
52		9.35-35.30
/ A		2140/2140
/		24800/24800

	2015	2016E	2017E
	18.7	13.9	13.3
	2.4	2.1	1.8
	1.47	1.44	1.34
EV/EBITDA (%)	8.6	9.5	8.3

2015.08.27

2015.05.19

2015.04.24




300	1M	2M	3M
%	5.3	22.0	-21.3
%	-		

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0.51%	15	15	170.06	5.62%	13.32
	0.62		0.25		
		15			
/			16 25	PE	16-17 EPS 0.84 0.87
					21
1.					
1					
15	170.06		5.62%		135.94

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**3 15**

2014	35.01	21.74%	0.00	0.00%	9.67	6.01%	14.09	8.75%	0.06	0.04%
2015	44.07	25.91%	0.00	0.00%	9.80	5.76%	14.37	8.45%	0.82	0.48%
	25.90%	4.17%	227.91%	0.00%	1.37%	-0.24%	1.97%	-0.30%	1234.85%	0.44%

wind

**4**

15 8.42 1.89 2014 2.77

**4**

2014	8.41	20.96	40.11%	-0.88	-4.21%	3.57	17%
2015	8.42	28.45	29.58%	1.89	6.64%	6.16	22%
	0.12%	35.76%	-10.53%	-313.95%	10.85%	72.23%	4.58%

wind

**2.**

1 2015 936.27

30.79% 57.98 98.59% 114.9

89.56%

**5**

	8233	-	-
	4610		1408
	4234	949	-
	<b>936.27</b>	<b>114.90</b>	<b>57.98</b>
	930.84	-	-
	539.63	-	9.6
	556.35		
	389.77	40.91	107.49
A	126	-	-

wind

**2**
**6 2015**

	1.32	-
KIII	300	-



