

# Stock Recommendations



PRIVATE CLIENT GROUP

JANUARY 04, 2023

## Stock Recommendations

Name of the Company	Latest Reco <sup>^</sup>	Price as on 04 Jan (Rs)	Price as on latest Report (Rs)	Latest Price target <sup>^</sup> (Rs)	Upside/ (Down-side) (%)	Latest Report Date	Mkt Cap (Rs Cr)	EPS (Rs)		EPS gth (%)		PE (x)		RoE (%)		EV/EBITDA (x)	
								FY24E	FY25E	FY24E	FY25E	FY24E	FY25E	FY24E	FY25E	FY24E	FY25E
<b>Building Material</b>																	
Century Plyboards (India) Ltd	BUY	515	595	687	33.3	14-Nov-22	11,451	19.3	22.9	9.7%	18.7%	26.7	26.0	20.3	20.0	17.1	14.2
Finolex Industries	ADD	187	134	145	(22.5)	27-Oct-22	11,613	7.6	9.0	230.4%	18.4%	24.6	14.9	11.9	13.0	15.0	12.3
Greenply Industries Ltd	BUY	145	171	214	47.9	9-Nov-22	1,746	9.2	11.9	35.3%	29.3%	15.7	14.4	16.9	18.5	9.0	7.2
Kajaria Ceramics Ltd	ADD	1,167	1,068	1,222	4.7	3-Nov-22	18,553	32.0	37.0	36.2%	15.6%	36.5	28.9	21.1	21.6	22.5	19.6
Supreme Industries Ltd	ADD	2,382	2,201	2,500	5.0	4-Nov-22	30,251	73.1	89.4	36.9%	22.3%	32.6	24.6	20.6	21.8	21.6	17.5
<b>Capital Goods &amp; Engineering</b>																	
AIA Engineering	ADD	2,580	2,732	2,900	12.4	15-Nov-22	24,330	98.7	111.5	7.2%	13.0%	26.1	24.5	14.6	14.3	20.2	17.7
Praj Industries Ltd	BUY	365	433	500	37.1	20-Oct-22	6,672	14.8	17.9	32.1%	20.9%	24.6	24.2	24.7	25.4	15.8	13.2
<b>Chemicals</b>																	
Balaji Amines Ltd	BUY	2,620	3,092	3,910	49.3	3-Nov-22	8,382	163.0	183.7	16.7%	12.7%	19.0	16.8	23.0	20.4	9.7	8.6
GHCL Ltd	ADD	530	631	700	32.2	7-Nov-22	5,031	92.7	98.0	-23.2%	5.7%	6.8	6.4	18.9	17.0	3.3	2.8
PCBL	BUY	129	127	180	39.5	27-Dec-22	4,863	15.0	18.1	21.0%	20.7%	8.5	7.0	18.2	19.3	5.6	4.6
Sumitomo Chemicals India Ltd	ADD	483	493	540	11.8	1-Nov-22	24,145	12.1	14.3	17.5%	18.2%	40.7	34.5	22.6	21.8	27.8	23.4
<b>Construction</b>																	
KNR Construction	ADD	263	239	260	(1.2)	16-Nov-22	7,393	15.8	17.7	11.3%	12.0%	16.7	13.5	15.6	15.1	8.1	6.8
NCC Ltd	BUY	91	72	95	4.2	10-Nov-22	5,478	8.7	9.9	13.0%	13.8%	10.5	7.3	8.5	9.1	3.2	2.5
NBCC (India) Ltd	REDUCE	40	36	37	(8.0)	17-Nov-22	7,236	2.2	2.5	83.3%	13.6%	18.3	14.4	19.6	20.2	13.7	10.8
PNC Infratech Ltd	BUY	302	264	310	2.7	17-Nov-22	7,741	24.4	27.4	20.8%	12.3%	12.4	9.6	15.0	14.6	5.0	4.0
<b>Consumer Durables</b>																	
Amber Enterprises Ltd	BUY	1,874	2,117	2,453	30.9	25-Oct-22	6,372	60.1	79.1	54.9%	31.6%	31.2	26.8	10.4	12.3	14.7	12.1
Bajaj Electricals Ltd	ADD	1,166	1,162	1,225	5.1	9-Nov-22	13,408	30.2	35.3	39.2%	16.9%	38.6	32.9	16.5	16.6	26.0	22.3
Blue Star Ltd	ADD	1,185	1,223	1,311	10.6	7-Nov-22	11,297	36.4	44.3	30.5%	21.7%	32.6	27.6	26.6	26.5	18.9	16.0
<b>Information Technology</b>																	
IndiaMART InterMESH	ADD	4,369	4,364	4,900	12.2	25-Oct-22	13,107	100.2	140.0	24.9%	39.7%	43.6	31.2	13.7	16.6	27.8	18.1
KPIT Technologies	SELL	680	650	553	(18.7)	20-Oct-22	18,363	17.4	20.5	20.8%	17.8%	39.1	31.7	26.5	25.6	22.6	19.0
NIIT Technologies (Coforge)	ADD	3,942	3,858	4,106	4.2	21-Oct-22	23,118	163.6	195.5	19.2%	19.5%	24.1	19.7	25.8	24.8	12.9	10.7
Persistent Systems	ADD	3,932	3,695	3,892	(1.0)	21-Oct-22	31,108	144.7	169.2	19.1%	16.9%	27.2	21.8	25.1	24.7	16.7	13.9
Qess Corp Ltd	ADD	401	493	550	37.1	11-Nov-22	5,817	25.1	34.4	79.3%	37.1%	16.0	14.3	14.0	17.5	6.9	5.5

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								FY24E	FY25E	FY24E	FY25E	FY24E	FY25E	FY24E	FY25E	FY24E	FY25E
<b>Metals &amp; Mining</b>																	
MOIL Ltd	BUY	168	152	185	10.3	15-Nov-22	4,470	15.0	17.7	7.1%	18.0%	11.2	8.6	12.3	13.2	6.3	5.1
APL Apollo Tubes Ltd	ADD	1,131	1,047	1,110	(1.9)	11-Nov-22	28,280	30.0	36.0	15.4%	20.0%	37.7	29.1	23.4	22.4	19.2	16.0
<b>Oil &amp; Gas</b>																	
Chennai Petroleum Corp	SELL	209	206	198	(5.2)	28-Oct-22	3,113	34.4	39.7	-77.8%	15.4%	6.1	5.2	9.3	9.8	5.5	5.0
Gujarat Gas	ADD	478	491	555	16.2	11-Nov-22	32,852	26.3	30.8	6.0%	17.1%	18.2	15.9	22.5	21.6	10.9	9.0
MRPL	SELL	57	57	55	(2.7)	31-Oct-22	9,908	7.7	10.0	670.0%	29.9%	7.3	5.7	16.8	18.3	6.8	5.7
<b>Paints</b>																	
Akzo Nobel India Ltd	ADD	2,198	2,206	2,430	10.5	10-Nov-22	10,265	69.0	76.0	12.4%	10.1%	31.9	29.0	20.1	20.1	19.1	17.3
<b>Pharmaceuticals</b>																	
Suven Pharmaceuticals	BUY	491	435	520	6.0	11-Nov-22	12,460	20.7	26.7	23.2%	29.0%	23.7	16.3	22.1	22.6	16.6	12.7
<b>Transportation</b>																	
Aegis Logistics Ltd	BUY	344	317	405	17.6	11-Nov-22	11,503	13.6	15.0	19.3%	10.3%	25.3	21.1	17.3	17.2	15.6	14.3
Allcargo Global Logistics	BUY	408	421	520	27.5	11-Nov-22	10,031	39.8	43.3	8.7%	8.8%	10.2	9.7	18.4	17.1	5.4	4.8
Blue Dart Express	BUY	7,821	7,169	8,575	9.6	7-Nov-22	18,614	199.9	214.3	9.5%	7.2%	39.1	33.5	37.2	32.1	14.5	13.1
TCL Express Ltd	BUY	1,809	1,883	2,275	25.8	6-Dec-22	6,965	49.5	61.5	27.6%	24.2%	36.5	30.6	23.9	24.1	27.1	21.6
VRL Logistics Ltd	BUY	542	589	750	38.3	14-Nov-22	4,946	24.8	30.0	18.1%	21.0%	21.9	19.6	25.2	26.6	9.0	7.5
<b>Others</b>																	
Bata India Ltd	BUY	1,641	1,739	2,200	34.1	15-Nov-22	21,166	37.8	44.0	27.7%	16.4%	43.4	39.5	30.1	29.3	23.3	20.6
Central Depository Services	REDUCE	1,136	1,237	1,205	6.1	2-Nov-22	11,928	30.7	33.0	10.4%	7.5%	37.0	37.5	21.5	19.9	27.3	24.8
EPL Ltd	ADD	168	150	165	(1.8)	11-Nov-22	5,292	8.7	9.9	20.8%	13.8%	19.3	15.2	12.4	12.6	7.2	6.3
JK Paper Ltd	ADD	414	425	450	8.6	16-Nov-22	7,377	77.1	73.5	1.8%	-4.7%	5.4	5.8	24.8	19.6	3.8	3.5
Radico Khaitan Ltd	REDUCE	1,049	978	950	(9.4)	16-Nov-22	13,952	24.5	29.7	18.9%	21.2%	42.8	32.9	13.9	15.0	25.9	20.6
VIP Industries Ltd	ADD	686	708	775	12.9	25-Oct-22	9,745	15.7	18.4	13.8%	17.2%	43.7	38.5	23.6	23.9	24.7	21.2
Welspun Corp Ltd	REDUCE	229	219	215	(6.0)	4-Nov-22	6,063	25.2	-	183.1%	0.0%	9.1	-	12.7	-	5.3	-

Source: Kotak Securities - Private Client Group

<sup>^</sup> All recommendations are with a 12 month perspective from the date of the report/update. Investors are requested to use their discretion while deciding the timing, quantity of investment as well as the exit.

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