

Thailand Morning Cuppa

Top Story

Supalai (SPALI TB, BUY, TP: THB23.60)

The Highest Quarter Around The Corner; Stay BUY
Company Update

Maintain BUY and THB23.60 TP, 15% upside and 5% yield. Supalai is one of our Top Picks within the residential property sector as it is expected to boost core revenue from 3Q21, driven by the transfer of completed condominium projects. With quarter earnings likely to peak in 4Q21F, strong orderbook to be recognised in 2H21, and aggressive project launches planned in 4Q21, we believe the company will see healthy 2H21F and FY21F earnings.

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Today's Report: [Supalai : The Highest Quarter Around The Corner; Stay BUY \(21 Sep 2021\)](#)

Previous Report: [Supalai : Another Solid Quarter In 2Q21; Maintain BUY \(23 Jul 2021\)](#)

Other Story

Thai Union Group (TU TB, BUY, TP: THB26.00)

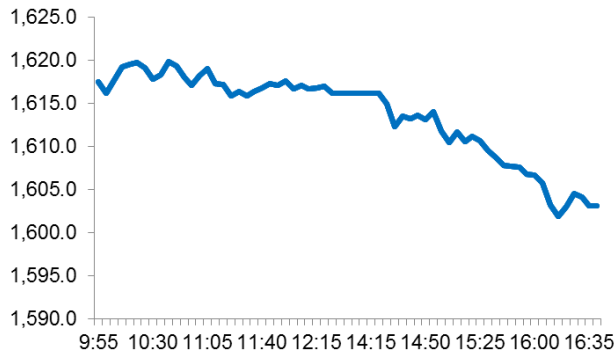
Moving Into High-Value Food Ingredients; BUY
Corporate News Flash

Keep BUY, THB26.00 TP, 20% upside and c.3% yield. Thai Union's seafood segment should recover in tandem with the reopening of the US and EU economies, as well as on the depreciation of the THB. GPM should remain robust (17-18%) on better sales and manageable raw material costs. We expect the group's frozen products unit to chalk strong numbers, even while it penetrates the high-value petcare and food ingredient markets. Well-diversified businesses enable it to have a better long-term view on consumer trends ahead.

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Today's Report: [Thai Union Group : Moving Into High-Value Food Ingredients; BUY \(21 Sep 2021\)](#)

Previous Report: [Thai Union Group : Demand Grows On US, EU Recovery; Keep BUY \(13 Aug 2021\)](#)

Chart 1: SET intra-day graph


SET	2019	2020	2021F	2022F
PE (x)	18.02	25.96	18.85	16.76
P/BV (x)	1.71	1.61	1.78	1.70
Yield (%)	3.28	3.26	2.57	2.80

SET Value by investor Type: Daily	Buy	Sell	Net
	(THBm)	(THBm)	(THBm)
Institution	3,036.21	7,428.68	-4,392.47
Proprietary	8,004.39	9,195.40	-1,191.00
Foreign	31,529.01	31,806.43	-277.42
Retail	42,444.02	36,583.12	5,860.89

SET Value by investor Type	MTD	YTD
	(THBm)	(THBm)
Institution	-6,199.51	-31,816.84
Proprietary	-1,205.86	10,143.51
Foreign	8,314.02	-79,528.54
Retail	-908.65	101,201.85

SET50 Index Future	Long	Short	Net	MTD	YTD
	Institution	36,676	40,440	-3,764	-4,600
Foreign	69,709	65,188	4,521	-26,327	21,289
Local	77,804	78,561	-757	30,927	-53,710

Foreign Fund Flows (USDm)			MTD	YTD	YoY
	Thailand	-8.3	-8.3	254.5	-2560.9

Note: *As at 20 Sep 2021 closing

Table 1: Key market indices (21 Sep 2021)

	Index	Chg	Chg (%)	YTD (%)
Thailand (SET)	1603.06	-22.59	-1.39%	10.6%
Thailand (SET50)	960.58	-14.13	-1.45%	5.5%
Thailand (SET100)	2190.10	-33.49	-1.51%	7.5%
USA (Dow Jones)	33970.47	-614.41	-1.78%	11.0%
USA (S&P500)	4357.73	-75.26	-1.70%	16.0%
USA (Nasdaq)	14713.90	-330.07	-2.19%	14.2%
UK (FTSE)	6903.91	-59.73	-0.86%	6.9%
Singapore (FSSTI)	3041.73	-29.50	-0.96%	7.0%
Hong Kong (Hang Seng)	24099.14	-821.62	-3.30%	-11.5%
Japan (Nikkei)	30007.46	-492.59	-1.62%	9.3%
Malaysia (KLCI)	1527.89	-20.62	-1.33%	-6.1%
China (SHANGHAI SE)	3613.97	UNCHG	UNCHG	4.1%
Indonesia (JCI)	6076.32	-56.93	-0.93%	1.6%

Foreign Exchange Rates / Oil Market

USD	Closed	Chg	Chg (%)
Baht (Onshore)	33.35	-0.02	0.05
Yen	109.48	0.04	-0.04
Euro	1.17	0.00	0.03

Oil Price (USD/barrel)		Chg	Chg (%)
Brent	73.96	0.24	0.33
Nymex-Crude Light	70.64	0.35	0.50

Note: *As at 20 Sep 2021 closing

Top BUYs

	TP (THB)	Upside (%)	Catalysts
Airports of Thailand (AOT TB)	73.50	20.49	<ul style="list-style-type: none"> 3QFY21 (Sep) is likely the weakest quarter, as domestic aviation has led AOT's performance and the severe COVID-19 third wave may dampen local tourism activities. Cost optimisation efforts have been implemented effectively since 3QFY20, but variable expenses rose in tandem with a recovery in aeronautical activities post lockdown Regarding the Government's border re-opening scheme from Jul 2021 onwards, we expect some positive sentiment on the Phuket Sandbox Model towards AOT, as Phuket International Airport is its third-largest property As the first-tier tourism player, AOT may strongly underpin the revival of the tourism industry, while the weakening short-term sentiment and earnings present investors with an opportunity to BUY
Home Product Center (HMPRO TB)	16.40	17.99	<ul style="list-style-type: none"> Expecting normalising earnings in FY21 – to be supported by full-year operations of all stores and retail malls vs a temporary closure from late March to mid-May, with profit margins approaching pre-pandemic levels HMPRO's investment in Vietnam may strongly benefit growing urbanisation and a potential rise in the construction sector Quarterly earnings momentum will continue its upward trajectory in 1Q21 Rapid improvement in sustainability development may allow the stock to continue trading at a premium
Kasikornbank (KBANK TB)	150.00	26.58	<ul style="list-style-type: none"> One of opening theme plays, given the highest exposure to the small & medium enterprise or SME portion among the banks we cover or TH Banks Investors should look forward to an eventual recovery, as the recovery in the short term is likely to be uneven and take time before reaching pre-COVID-19 levels The bank trends to disrupt itself with new technologies. We believe this strategy will help the bank to improve profitability and quality in the long run FY21F earnings outlook is forecasted to rebound 8.5% in line with sector earnings. This is due to lower provisions and a rebound in net fees income Our valuation is conservative and its share price is trading below -1SD from the historical mean, which is compelling
PTT Exploration & Production (PTTEP TB)	132.00	18.39	<ul style="list-style-type: none"> We like PTTEP as a good proxy to stronger commodity prices 2Q21 earnings are expected to register stronger results on the back of stronger sales volumes and crude prices
PTT Global Chemical (PTTGC TB)	73.00	24.26	<ul style="list-style-type: none"> Bumper 1H21 earnings expected from robust petrochemical product spreads to translate into a strong FY21F rebound in YoY performance Current uptrend in oil prices also expected to see PTTGC regain its gas-based crackers' relative cost advantage over industry peers operating naphtha-based crackers
Siam Cement (SCC TB)	500.00	22.55	<ul style="list-style-type: none"> Petrochemicals is currently in an upcycle. HDPE-naphtha spread in 1Q21 should remain as high as levels recorded in 4Q20, while the polypropylene-naphtha spread reached another high in 1Q21. SCC's polyolefin sales volumes returned to normal levels after the turnaround of the Map Ta Phut olefin cracker was completed in 4Q20 The improvement in cement & building materials business should be noticeable in 1Q21, with cement demand growing 1-2% in Thailand. This would be due to stronger demand from the residential property sector in provincial areas, and continuously solid demand stemming from government infrastructure projects FY21 will start out with strong earnings growth in 1Q21, while the petrochemical division may be driven by higher production volume after de-bottlenecking the Map Ta Phut olefin cracker finishing 2Q21. For 2H21, we expect a brighter outlook for the cement & building materials business especially in ASEAN, when construction activities resume to normal
Tisco Financial (TISCO TB)	111.00	20.98	<ul style="list-style-type: none"> Superior asset quality to peers and strong capital base – highest among TH Banks – made TISCO deserve to trade at premium valuation. Its c.7% dividend yield is compelling and relatively highest among TH Banks, with full-year payment basis. We believe TISCO's conservative strategy amidst the pandemic will be proper, allowing the bank to survive post COVID-19 FY21 earnings is expected to rebound 7%YoY mainly on lower provisions and a rebound in net fees income, despite moderated NII and a slight increase in overheads

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