

ANALYST CONSENSUS

AutoWallis

Date (last update):

21-11-2025

AutoWallis share 1-year target price:

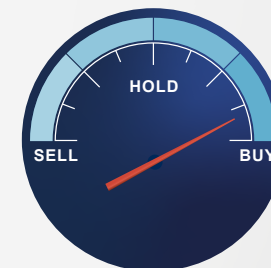
200 HUF (average)

Number of analyses:

4

Analyst House	latest research	recommendation	target price
Concorde	2025.11.17	BUY	200 HUF
ERSTE	2025.11.14	BUY	202 HUF
MBH	2025.11.17	BUY	200 HUF
OTP	2025.11.21	BUY	198 HUF

1 3 5
2 4 6



Full analyst consensus (million HUF)	2024	2025 Consensus					2025	2026 Consensus					2026	2027 Consensus				
	actual	OTP	MBH	ERSTE	Concorde	Average		OTP	MBH	ERSTE	Concorde	Average		OTP	MBH	ERSTE	Concorde	Average
Revenue	398.460	482.137	454.515	469.414	462.283	467.087		511.065	508.332	501.115	494.125	503.659		541.729	538.524	535.112	533.451	537.204
COGS	327.079	398.727	369.127	425.612				421.117	419.717	451.190	469.990	440.504		445.843	443.972	482.826	506.032	469.668
Interest income from lease receivables	1.380	1.971	1.462	3.116				2.030	1.769	3.610				2.091	2.239	3.618		
Material cost	10.072	13.150	13.562					12.632	13.149					13.001	13.831			
Services used	21.981	26.518	27.821					28.109	26.188					29.795	27.889			
Personnel expenses	19.541	26.014	23.257	24.980				26.132	25.838	26.943				27.122	27.129	28.334		
Other income (expenses)			646	4.121				895	4.147	721				861	4.184	779		
EBITDA	20.175	18.247	23.503	19.972	19.875	20.399		24.471	24.713	24.851	24.856	24.723		27.458	27.556	25.426	28.197	27.159
Depreciation	5.678	6.450	7.609	7.851				7.487	8.497	7.958	7.412	7.839		8.217	8.807	8.410	8.002	8.359
EBIT	14.498	11.797	15.894	12.122	12.940	13.188		16.984	16.216	16.888	17.444	16.883		19.241	20.111	17.222	20.195	19.192
Financial result	5.711	3.667	3.384	3.180				3.562	3.687	3.372	3.358	3.495		3.489	3.820	2.374	3.345	3.507
Profit before tax	9.097	7.709	12.365	8.005				13.453	12.529	13.330	14.524	13.459		15.752	20.150	13.540	17.288	16.683
Tax	2.121	1.773	2.405	1.527				2.555	3.062	2.656	2.612	2.722		3.386	3.036	2.814	3.112	3.087
Net profit	6.976	5.936	9.915	6.463	7.763	7.519		10.898	9.467	10.644	12.535	10.886		13.344	18.110	10.725	14.851	14.258
EBITDA margin	5,1%	3,8%	5,2%	4,2%	4,3%	4,4%		4,8%	4,9%	5,0%	5,0%	4,9%		5,1%	5,1%	4,8%	5,3%	5,1%
EBIT margin	3,6%	2,2%	3,5%	2,6%	2,8%	2,8%		3,3%	3,2%	3,4%	3,5%	3,3%		3,6%	3,7%	3,2%	3,8%	3,6%
EPS	12,7	10,9	18,4	12,1	14,4	14,0		20,0	17,6	20,0	21,8	19,8		24,7	21,9	20,1	26,0	23,2
EV/EBITDA	7,2	8,0	7,4	7,8	6,2	7,4		6,0	7,0	6,3	4,9	6,1				6,1	4,0	
P/E	14,1	8,1		12,9	12,0			6,8		7,9	7,5					7,8	6,3	