

MAYIS AYI YABANCI İŞLEMLERİ - 2025

Araştırma

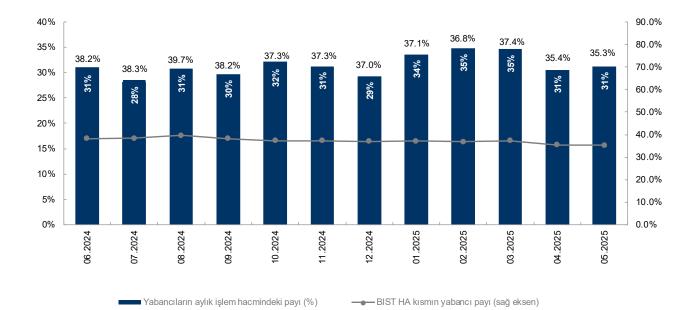
Yabancı yatırımcılar Mayıs ayında **339 milyon dolarlık net alış** gerçekleştirdi. 2025 yılında kümülatif olarak **635 milyon dolarlık net alış** gerçekleştirildi.

<u>En çok alım yapılan hisseler:</u> BIM **<BIMAS TI>** US\$124mn; Aselsan **<ASELS TI>** US\$72mn; Turkcell **<TCELL TI>** US\$56mn; Koç Holding **<KCHOL TI>** US\$41mn ve Tüpraş **<TUPRS TI>** US\$38mn.

<u>En çok satış yapılan hisseler:</u> Akbank **<AKBNK TI>** US\$68mn; Ford Otomotiv **<FROTO TI>** US\$38mn; Yapı Kredi Bank **<YKBNK TI>** US\$38mn; Anadolu Efes **<AEFES TI>** US\$34mn ve Enka İnşaat **<ENKAI TI>** US\$32mn.

En Fazla Net Alış (\$ mn)	Alış	Satış	Net Alış	En Fazla Net Satış (\$ mn)	Alış	Satış	Net Alış
Bim Birleşik Mağazalar	660	536	124	Akbank	1,226	1,294	-68
Aselsan	1,080	1,008	72	Ford Otosan	208	246	-38
Turkcell	436	380	56	Yapı Ve Kredi Bankası	1,219	1,257	-38
Koç Holding	813	772	41	Anadolu Efes Biracılık	187	221	-34
Tüpraş	420	383	38	Enka İnşaat	216	248	-32
Pegasus Hava Taşımacılığı	346	311	36	Türk Hava Yolları	1,106	1,138	-32
İş Bankası (C)	774	745	29	Sasa	195	209	-14
Sabancı Holding	478	452	26	Kardemir (D)	209	223	-13
Koza Altın İşletmeleri	233	209	24	Tav Havalimanları	129	141	-12
Emlak G.M.Y.O.	451	428	23	Oyak Çimento Fabrikaları	98	110	-11

Kaynak: BIST; YKY Araştırma; Rasyonet



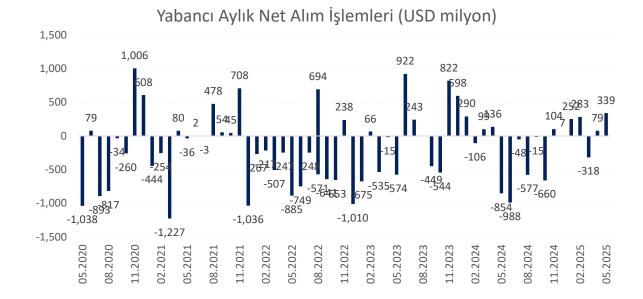
Kaynak: BIST, MKK, YKY Araştırma



YABANCI İŞLEMLERİNİN AYLARA GÖRE SEYRİ

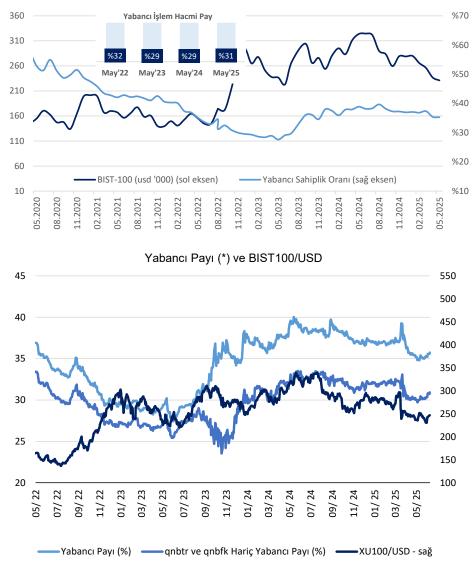
	NET	BIST	YABANCI İŞLEM			NET	BIST	YABAN	CIİŞLEM
(\$ milyon)	Alış	İşl. Hacmi	Hacmi	Рауі	(\$ milyon)	Alış	İşl. Hacmi	Hacmi	Рауі
Şub.24	-106	136,334	70,927	%26	Eki.24	-660	63,098	40,655	%32
Mar.24	99	103,537	59,521	%29	Kas.24	104	74,648	46,699	%31
Nis.24	136	80,927	47,816	%30	Ara.24	7	75,269	44,102	%29
May.24	-854	112,095	65,470	%29	Oca.25	252	81,455	54,724	%34
Haz.24	-988	68,090	42,312	%31	Şub.25	283	71,793	50,016	%35
Tem.24	-48	91,728	51,556	%28	Mar.25	-318	100,907	69,906	%35
Ağu.24	-577	77,569	47,722	%31	Nis.25	79	74,078	46,871	%32
Eyl.24	-15	70,908	42,035	%30	May.25	339	72,488	45,305	%31

Kaynak: BIST, YKY Araştırma, Rasyonet









Yabancı Sahiplik Oranı vs. BIST 100 (USD '000)

120,000 %40 %35 100,000 %30 80,000 %25 %20 60,000 %15 40,000 %10 20,000 %5 %0 ٥ 02-22 08-22 11-22 02-23 05-23 08-23 11-23 02-24 11-13 11-17 02-18 11-19 08-20 11-20 05-22 05-24 08-24 02-20 11-24 02-25 05-25 05-18 08-18 11-18 05-20 02-21 08-21 11-21 05-21 ġ ÷ 6 ģ ä ģ ģ ŝ ន់ 8 ģ 9 5 ģ ÷ ġ ŝ ģ ŝ ģ ġ ncı İşlem Hacmi (mn \$) (sağ eksen) Hacmindeki Pavı (sol eksen)

(*): QNB payları dahil. Bu paylar hariç bakıldığında yabancı sahiplik oranının %**30.31** seviyelerinde olduğunu 30/052025 tarihi itibariyle tahmin ediyoruz.



EN FAZLA NET ALIŞ (US\$mn)

		Mayıs - 2025		
		Alış	Satış	Net Alış
1	BİM BİRLEŞİK MAĞAZALAR A.Ş.	660.2	536.1	124.0
2	ASELSAN ELEKTRONİK SANAYİ VE TİCARET A.Ş.	1,079.7	1,007.6	72.0
3	TURKCELL İLETİŞİM HİZMETLERİ A.Ş.	435.9	380.0	56.0
4	KOÇ HOLDİNG A.Ş.	813.2	771.9	41.0
5	TÜPRAŞ TÜRKİYE PETROL RAFİNERİLERİ A.Ş.	420.4	382.9	38.0
6	PEGASUS HAVA TAŞIMACILIĞI A.Ş.	346.2	310.6	36.0
7	TÜRKİYE İŞ BANKASI A.Ş. C GRUBU	773.7	745.1	29.0
8	HACI ÖMER SABANCI HOLDİNG A.Ş.	478.1	451.7	26.0
9	KOZA ALTIN İŞLETMELERİ A.Ş.	232.9	208.8	24.0
10	EMLAK KONUT GAYRİMENKUL YATIRIM ORTAKLIĞI	451.1	428.0	23.0
11	DESTEK FINANS FAKTORING A.Ş.	121.7	103.0	19.0
12	TOFAŞ TÜRK OTOMOBİL FABRİKASI A.Ş.	300.8	283.5	17.0
13	AHLATCI DOĞAL GAZ DAĞITIM ENERJİ VE YATIRIM /	39.1	24.2	15.0
14	BALSU GIDA SANAYİ VE TİCARET A.Ş.	66.7	52.2	15.0
15	MİGROS TİCARET A.Ş.	192.2	179.9	12.0
16	DOĞUŞ OTOMOTİV SERVİS VE TİCARET A.Ş.	110.6	99.1	12.0
17	PASİFİK EURASİA LOJİSTİK DIŞ TİCARET A.Ş.	78.3	68.9	9.0
18	RAL YATIRIM HOLDİNG A.Ş.	60.7	52.6	8.0
19	ÜLKER BİSKÜVİ SANAYİ A.Ş.	131.3	123.9	7.0
20	ALBARAKA TÜRK KATILIM BANKASI A.Ş.	28.5	21.1	7.0
	BIST TOPLAM	22,822.3	22,483.1	339

Kaynak: BIST, YKY Araştırma

EN FAZLA NET SATIŞ (US\$mn)

		Mayıs - 2025		
		Alış	Satış	Net Alış
1	AKBANK T.A.Ş.	1,226.1	1,294.5	-68.0
2	FORD OTOMOTİV SANAYİ A.Ş.	208.4	246.1	-38.0
3	YAPI VE KREDİ BANKASI A.Ş.	1,219.2	1,256.8	-38.0
4	ANADOLU EFES BİRACILIK VE MALT SANAYİİ A.Ş.	187.4	221.0	-34.0
5	ENKA İNŞAAT VE SANAYİİ A.Ş.	215.7	248.0	-32.0
6	TÜRK HAVA YOLLARI A.O	1,106.0	1,137.8	-32.0
7	SASA POLYESTER SANAYİ A.Ş.	194.5	208.9	-14.0
8	KARDEMİR KARABÜK DEMİR ÇELİK SANAYİ VE TİC/	209.3	222.6	-13.0
9	TAV HAVALİMANLARI HOLDİNG A.Ş.	129.1	141.2	-12.0
10	OYAK ÇİMENTO FABRİKALARI A.Ş.	98.3	109.7	-11.0
11	OBA MAKARNACILIK SANAYI VE TICARET A.Ş.	97.0	108.3	-11.0
12	ÇELEBİ HAVA SERVİSİ A.Ş.	41.8	52.5	-11.0
13	GÜBRE FABRİKALARI T.A.Ş.	202.7	212.0	-9.0
14	KONTROLMATİK TEKNOLOJİ ENERJİ VE MÜHENDİSL	78.2	87.3	-9.0
15	BATI EGE GAYRİMENKUL YATIRIM ORTAKLIĞI A.Ş.	58.4	67.4	-9.0
16	grainturk Holding A.Ş.	40.7	48.4	-8.0
17	KOZA ANADOLU METAL MADENCİLİK İŞLETMELERİ	81.8	87.9	-6.0
18	AKSA AKRİLİK KİMYA SANAYİİ A.Ş.	16.6	22.4	-6.0
19	ANADOLU ANONİM TÜRK SİGORTA ŞİRKETİ	25.9	31.4	-5.0
20	TEKFEN HOLDİNG A.Ş.	140.0	145.1	-5.0
	BIST TOPLAM	22,822.3	22,483.1	339

Kaynak: BIST, YKY Araştırma



BIST-30 HİSSELERİNDE YABANCI PAYI

1 2 3 4	Hisse Kodu AEFES AKBNK ASELS	Anadolu Efes Biracılık	Mar 2025 %38.59	Nis 2025	May 2025	Aylık	Sene Başı
2 3 4	AKBNK		%38 59				Selle Daşı
3 4		A lab and a	/000.00	%38.56	%35.91	-%2.65	-%17.95
4	ASELS	Akbank	%49.61	%50.22	%46.93	-%3.30	-%4.73
		Aselsan	%39.62	%45.19	%47.20	%2.01	%14.17
_	ASTOR	Astor Enerji	%39.17	%39.84	%41.41	%1.57	%24.74
5	BIMAS	Bim Birleşik Mağazalar	%43.18	%43.99	%46.56	%2.56	-%3.45
6	CIMSA	Çimsa	%9.57	%8.62	%8.57	-%0.05	-%1.26
7	EKGYO	Emlak G.M.Y.O.	%17.03	%16.57	%18.65	%2.07	%0.32
8	ENKAI	Enka İnşaat	%29.40	%30.62	%29.16	-%1.46	-%3.94
9	EREGL	Ereğli Demir Çelik	%17.81	%17.99	%17.52	-%0.47	%0.20
10	FROTO	Ford Otosan	%35.81	%34.85	%32.97	-%1.88	-%1.60
11	GARAN	Garanti Bankası	%9.44	%8.53	%8.78	%0.25	%0.22
12	HEKTS	Hektaş	%9.17	%9.82	%10.28	%0.46	%0.06
13	ISCTR	İş Bankası (C)	%26.55	%26.72	%27.82	%1.10	-%1.60
14	KCHOL	Koç Holding	%46.30	%42.14	%42.14	%0.00	-%9.41
15	KOZAL	Koza Altın İşletmeleri	%18.30	%20.02	%21.53	%1.51	%2.66
16	KRDMD	Kardemir (D)	%16.75	%14.08	%12.29	-%1.79	-%1.42
17	MGROS	Migros	%30.19	%30.30	%31.58	%1.28	%1.35
18	PETKM	Petkim	%8.89	%8.07	%8.79	%0.71	-%1.25
19	PGSUS	Pegasus Hava Taşımacılığı	%33.37	%30.85	%30.98	%0.13	%3.88
20	SAHOL	Sabancı Holding	%38.29	%35.71	%37.09	%1.38	-%4.52
21	SASA	Sasa	%7.31	%16.53	%25.33	%8.80	%16.17
22	SISE	Şişe Cam	%12.05	%11.95	%11.98	%0.04	-%3.60
23	TAVHL	Tav Havalimanları	%67.96	%64.86	%63.17	-%1.70	-%4.52
24	TCELL	Turkcell	%65.48	%66.27	%67.47	%1.20	%4.78
25	THYAO	Türk Hava Yolları	%28.01	%30.50	%27.52	-%2.98	%1.00
26	TOASO	Tofaş Otomobil Fab.	%15.77	%14.60	%16.32	%1.72	-%11.08
27	TTKOM	Türk Telekom	%29.57	%36.84	%37.49	%0.65	%14.54
28	TUPRS	Tüpraş	%24.27	%25.38	%25.82	%0.44	-%2.76
29	ULKER	Ülker	%10.07	%10.20	%10.71	%0.51	-%0.80
30	YKBNK	Yapı Ve Kredi Bankası	%28.54	%27.23	%25.15	-%2.07	-%8.30
	BIST-30		%37.35	%35.41	%35.28	-%0.13	-%1.67

Kaynak: BIST, YKY Araştırma

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