

Goodbody Market Commentary Metrics



Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
		2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	8.85	0.81	0.90	10.9	9.9	1.3	1.2			4.9%	6.0%	4569.1	4708.1	2193.7	2275.6		
Air France-KLM	12.30	5.98	7.52	2.1	1.6	3.2	2.9	72%	94%	0.0%	0.0%	34552.6	36037.2	2206.4	2647.0	5404.1	6076.3
Applied Nutrition	248.50	11.41	12.82	21.8	19.4	14.9	13.0	2%	3%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	191.00	21.43	22.68	8.9	8.4	6.2	6.0	13%	13%	5.2%	5.3%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	16.54	1.58	1.83	10.5	9.0	1.2	1.1			4.2%	4.5%	4200.8	4421.8	1813.1	2015.0		
Barratt Redrow	365.10	29.14	35.88	12.5	10.2	0.6	0.6	nm	10%	4.7%	5.6%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2786.00	188.09	228.21	14.8	12.2	0.9	0.8	11%	7%	2.7%	3.3%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	4324.00	342.80	354.08	12.6	12.2	1.1	1.1	4%	10%	2.8%	1.5%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	357.80	29.89	35.36	12.0	10.1	6.1	5.5	8%	8%	4.5%	4.7%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bvies Technology	303.40	23.50	26.39	12.9	11.5	8.6	7.1	8%	9%	9.5%	10.8%	228.1	250.9	67.0	77.2	68.7	79.2
C & C Group	117.60	0.11	0.11	12.7	12.3	7.7	8.0	5%	6%	4.8%	4.8%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.39	0.23	0.25	10.6	9.6	7.6	7.1	11%	8%	4.2%	4.6%	1045.0	1126.6	177.7	190.4	182.6	196.0
Coca-Cola HBC	4810.00	2.92	3.14	18.8	17.4	11.3	10.4	4%	4%	2.4%	2.5%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6
Compass Group	2278.00	1.46	1.58	21.0	19.3	11.9	11.2	4%	4%	2.4%	2.6%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranwick	5430.00	297.22	315.87	18.3	17.2	9.1	8.6	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0
CBH	119.98	583.63	654.68	20.6	18.3	11.6	10.7	8%	9%	1.3%	1.4%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	5185.00	421.97	505.84	12.3	10.3	7.4	6.8	11%	11%	4.2%	4.4%	14964.1	15168.2	521.6	559.4	788.0	829.2
Devolver Digital	24.50	0.18	0.67	187.6	49.5	10.2	7.4	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1662.50	1.63	1.73	13.7	12.9	11.9	11.2	6%	7%	4.6%	4.9%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4
Dole	16.04	148.96	158.44	10.8	10.1	5.0	4.6	9%	10%	2.3%	2.5%	9311.8	9501.3	298.6	309.3	408.1	418.9
easyJet	464.00	73.47	81.16	6.3	5.7	2.0	2.0	8%	7%	3.3%	3.7%	11209.3	11869.9	738.1	848.5	1613.7	1857.8
Entain	575.00	64.59	77.21	8.9	7.4	6.9	6.6	10%	12%	3.6%	3.8%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	29.90	17.65	FALSE	1.7	FALSE	4.3	FALSE	80%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	17.00																
Fever-Tree Drinks	953.00	29.23	39.36	32.6	24.2	20.2	15.5	3%	5%	2.0%	2.1%	405.4	444.5	35.8	50.5	50.1	65.1
Flutter Entertainment	103.68	9.08	13.27	11.4	7.8	8.2	6.1	9%	14%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	190.00	14.50	18.85	13.1	10.1	6.4	5.0	11%	13%	3.6%	4.7%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	397.00	849.11	0.00	0.5	nm	3.1	3.2	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	750.00	43.47	48.57	17.3	15.4	8.8	8.4	4%	5%	3.1%	3.4%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	17890.00	547.81	585.95	32.7	30.5	20.2	18.8	3%	3%	2.7%	2.9%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	20.66	1.45	1.58	14.3	13.1	10.1	9.1	7%	7%	2.4%	2.6%	3890.9	4044.9	382.4	417.4	530.1	566.4
Glenveagh Properties	2.26	0.21	0.22	10.7	10.3	12.2	11.2	12%	7%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6
Grafton Group	989.80	74.77	80.43	13.2	12.3	6.4	5.9	6%	6%	4.0%	4.2%	2623.2	2724.0	168.3	183.3	321.3	341.3
Greencoat Renewables	0.68	0.05	FALSE	13.2	FALSE	19.7	FALSE	20%	FALSE	10.2%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	270.00	16.21	23.18	16.7	11.6	9.3	6.6	5%	9%	1.8%	2.6%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1584.00	124.39	132.84	12.7	11.9	5.4	4.9	3%	8%	3.9%	4.2%	2305.8	2459.0	189.7	201.4	372.0	401.3
Hammerston	368.20	22.46	26.19	16.8	14.1	1.0	0.9	10%	16%	6.9%	6.8%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	111.50	0.13	0.18	9.9	7.2	6.4	4.4	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	970.00	50.27	53.10	19.3	18.3	10.7	10.4	4%	5%	2.8%	3.0%	2495.9	2592.7	363.2	375.5	526.6	543.1
IAG	423.70	0.78	0.87	6.2	5.5	2.7	2.3	18%	21%	2.1%	2.2%	34358.9	35651.9	5414.3	5569.3	8289.9	8602.6
Ibstock	132.40	7.48	9.52	17.7	13.9	9.1	7.9	7%	8%	2.8%	3.6%	408.3	436.2	41.1	51.7	77.4	86.6
ICG	6.68	0.49	0.54	13.7	12.4	7.8	7.1	4%	12%	2.5%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.07	0.14	0.15	7.9	7.0	0.8	0.7	3%	3%	4.9%	5.2%	67.6	69.9	93.9	102.4	90.4	98.9
J.D. Wetherspoon	722.50	48.97	52.22	14.8	13.6	7.8	7.5	5%	6%	1.7%	1.7%	2243.1	2356.2	141.1	146.1	256.5	262.2
Jet2	1256.00	190.10	189.04	6.6	6.6	1.0	1.0	9%	13%	1.4%	1.4%	7605.5	8182.1	439.5	414.8	777.4	783.6
Kainos Group	755.00	32.66	38.15	23.4	19.8	13.4	11.6	5%	7%	3.3%	3.3%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	75.30	5.01	5.52	15.0	13.7	11.4	10.4	5%	5%	2.0%	2.2%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingsfisher	370.50	22.02	23.73	16.8	15.6	6.6	6.1	5%	8%	3.3%	3.3%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	84.35	4.25	4.81	19.8	17.5	13.4	12.1	4%	4%	0.7%	0.8%	9653.7	10379.1	971.5	1069.5	1321.5	1436.3
Lufthansa	9.09	1.24	1.54	7.4	5.9	7.2	6.3	16%	19%	4.1%	5.1%	41784.6	43685.5	2152.9	2614.6	3493.5	3976.2
Manston's	60.20	9.02	10.21	6.7	5.9	7.3	6.8	14%	15%	0.0%	0.0%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	301.00	31.57	33.42	9.5	9.0	6.3	5.9	5%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	462.00	33.24	46.11	13.9	10.0	11.5	8.4	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	887.20	0.53	0.94	19.1	10.8	8.1	6.3	3%	3%	2.9%	4.7%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	132.60	4.20	4.73	31.5	28.0	10.3	9.6	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.24	0.54	0.57	7.8	7.4	5.0	4.8	6%	11%	4.3%	4.5%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.18	0.21	0.29	15.4	11.1	0.8	0.7			2.2%	3.8%	698.1	766.6	171.7	221.2		
Persimmon	1506.00	103.14	116.00	14.6	13.0	1.3	1.2	4%	7%	2.7%	2.8%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	353.50	0.20	0.28	20.1	14.4	0.7	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	94.60	9.81	10.33	9.6	9.2	4.8	4.5	4%	8%	3.1%	3.5%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	27.42	2.09	2.33	13.1	11.8	7.5	6.6	8%	7%	1.5%	1.7%	15448.0	16196.0	2449.7	2663.1	3787.2	4048.8
Smurfit Westrock	46.45	2.39	3.21	19.4	14.5	7.1	6.4	7%	7%	3.9%	4.2%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	205.60	13.90	16.80	14.8	12.2	6.8	6.5	5%	5%	2.4%	2.6%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	376.60	41.43	45.31	9.1	8.3	7.3	6.8	6%	11%	5.4%	5.9%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	113.05	7.69	9.29	14.7	12.2	1.0	1.0	5%	6%	8.8%	9.3%	3941.4	4240.8	413.6	494.0	420.5	