

Goodbody Market Commentary Metrics



Company	Price 1c	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	9.04	0.84	0.92	10.7	9.8	1.3	1.3			6.0%	6.5%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	9.32	3.93	5.19	2.4	1.8	3.5	3.3	76%	99%	0.0%	0.0%	34741.0	36232.6	1580.8	1934.8	4779.8	5366.7
Applied Nutrition	212.50	11.41	12.82	18.6	16.6	12.6	10.9	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	173.50	21.43	22.68	8.1	7.7	5.8	5.6	14%	14%	5.8%	5.9%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	15.61	1.47	1.78	10.6	8.8	1.1	1.1			5.1%	6.1%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	263.10	29.14	35.88	9.0	7.3	0.4	0.4	nm	14%	6.5%	7.8%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	1896.00	188.09	228.21	10.1	8.3	0.6	0.6	17%	11%	4.0%	4.9%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	3104.00	342.80	354.08	9.1	8.8	0.8	0.8	5%	14%	3.9%	2.1%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	307.00	29.89	35.36	10.3	8.7	5.5	4.9	9%	10%	5.2%	5.5%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bvies Technology	281.40	22.47	24.51	12.5	11.5	8.1	6.9	9%	8%	9.7%	10.7%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	115.60	0.11	0.11	12.6	12.2	7.7	7.9	5%	6%	4.8%	4.8%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.14	0.23	0.25	9.4	8.4	6.5	6.1	5%	10%	5.4%	5.9%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4256.00	2.92	3.14	16.7	15.5	10.1	9.4	4%	4%	2.7%	2.9%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	2955.00	1.46	1.58	27.1	24.9	14.8	13.9	3%	3%	1.8%	2.0%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranwick	5190.00	297.22	315.87	17.5	16.4	8.7	8.2	3%	3%	2.9%	2.1%	2279.5	3175.4	240.1	325.1	344.0	
CBH	106.20	583.63	654.68	18.2	16.2	10.5	9.7	9%	10%	1.5%	1.5%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	4764.00	421.97	505.84	11.3	9.4	6.8	6.3	12%	12%	4.5%	4.8%	14964.1	15168.2	521.6	658.2	788.0	829.2
Devolver Digital	22.00	0.18	0.67	167.1	44.1	8.5	6.1	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1395.00	1.59	1.59	11.7	11.7	10.7	10.5	7%	7%	3.0%	3.5%	19668.2	19214.0	5720.2	5573.1	6294.6	6098.5
Dole	14.26	148.96	158.44	9.6	9.0	4.6	4.3	10%	11%	2.6%	2.8%	9311.8	9501.3	298.6	309.3	408.1	418.9
easyJet	364.50	53.51	60.02	6.8	6.1	1.9	2.0	3%	1%	4.3%	4.7%	11134.7	11814.8	540.1	649.6	1415.8	1658.9
Entain	579.20	64.59	77.21	9.0	7.5	6.9	6.6	10%	12%	3.6%	3.7%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	32.60	17.65	FALSE	1.8	FALSE	4.4	FALSE	73%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FRD Holdings	16.50																
Fever-Tree Drinks	768.00	29.14	39.37	26.4	19.5	15.8	12.1	4%	7%	2.4%	2.5%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	103.05	9.08	13.27	11.4	7.8	8.1	6.1	9%	14%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	161.40	13.41	15.15	12.0	10.7	6.5	5.8	14%	13%	5.2%	5.8%	404.4	434.0	43.6	47.6	63.8	69.3
Frontier Developments	351.00	849.11	0.00	0.4	nm	2.7	2.8	6%	8%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	674.00	43.47	48.57	15.5	13.9	8.2	7.8	4%	5%	3.5%	4.1%	396.2	413.8	43.2	47.6	73.3	76.9
Games Workshop Group	17600.00	547.81	585.95	32.1	30.0	19.9	18.4	3%	3%	2.8%	3.0%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	19.84	1.47	1.60	13.5	12.4	10.1	9.2	6%	7%	2.8%	3.1%	3962.9	4096.6	410.1	431.8	525.8	558.4
Glenveagh Properties	1.98	0.21	0.22	9.5	8.8	10.6	9.3	16%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	903.00	74.77	80.43	12.1	11.2	5.9	5.4	7%	7%	4.4%	4.7%	2623.2	2724.0	168.3	183.3	321.3	341.3
Greencoat Renewables	0.72	0.05	FALSE	14.0	FALSE	20.2	FALSE	19%	FALSE	9.6%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	243.00	16.21	23.18	15.0	10.5	8.6	6.1	5%	10%	2.0%	2.9%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1546.00	122.02	122.78	12.7	12.6	5.3	5.1	5%	7%	4.5%	4.5%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerston	301.80	22.65	24.70	13.3	12.2	0.7	0.7	9%	10%	5.8%	6.3%	215.9	232.2	177.7	192.3	177.7	192.2
Hopwood Group	100.00	0.13	0.18	8.9	6.5	5.7	3.9	13%	21%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Hovenden Joinery	814.00	51.39	57.32	15.8	14.2	8.9	8.3	6%	6%	2.8%	2.9%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	369.80	0.68	0.78	6.2	5.5	3.3	3.1	12%	11%	2.5%	2.6%	34336.2	35530.4	4925.0	5122.7	7271.1	7737.9
Ibstock	106.00	6.26	7.53	16.9	14.1	8.0	7.3	5%	8%	3.0%	3.6%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.20	0.49	0.54	12.7	11.5	7.4	6.6	4%	13%	2.8%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.01	0.14	0.15	7.4	6.6	0.7	0.7	3%	3%	6.7%	5.5%	67.6	69.9	93.9	102.4	90.4	98.9
J.D. Wetherspoon	602.00	46.02	51.49	13.1	11.7	7.4	7.1	6%	6%	2.0%	2.0%	2222.8	2319.4	132.0	139.1	247.2	255.0
Jet2	1174.00	190.10	189.04	6.2	6.2	0.8	0.8	9%	13%	1.5%	1.5%	7605.5	8182.1	429.5	414.8	777.4	783.6
Kainos Group	752.00	32.66	38.15	23.3	19.7	13.3	11.5	5%	7%	3.3%	3.3%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	67.75	5.01	5.52	13.5	12.3	10.5	9.5	6%	6%	2.3%	2.3%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingfisher	289.70	22.02	23.73	13.1	12.2	5.5	5.0	6%	11%	4.3%	4.3%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	73.70	4.18	4.62	17.6	15.9	11.8	10.8	5%	5%	0.8%	0.9%	8994.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	7.77	1.14	1.46	6.8	5.3	7.8	6.5	18%	23%	4.4%	5.7%	41422.2	43345.4	1903.2	2543.7	3086.8	3746.1
Manston's	54.00	9.02	10.21	6.0	5.3	7.1	6.6	16%	16%	0.0%	3.7%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	259.00	31.57	33.42	8.2	7.7	5.8	5.4	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	465.20	33.24	46.11	14.0	10.1	11.6	8.4	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	844.40	0.53	0.94	18.3	10.3	7.9	6.1	3%	5%	3.0%	4.8%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	117.60	4.20	4.73	28.0	24.9	9.2	8.6	4%	6%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.54	0.54	0.57	8.3	8.0	5.3	5.1	5%	10%	4.0%	4.2%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.97	0.21	0.29	14.4	10.4	0.7	0.7			2.4%	4.0%	698.1	766.6	171.7	221.2		
Persimmon	1093.00	103.14	116.00	10.6	9.4	0.9	0.9	5%	9%	3.7%	3.9%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	363.50	0.22	0.29	18.7	14.2	0.7	0.6	4%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	91.00	9.81	10.33	9.3	8.8	4.7	4.4	5%	8%	3.2%	3.6%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	24.95	2.08	2.18	12.0	11.4	6.8	6.3	9%	7%	1.7%	1.8%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1
Smurfit Westrock	40.07	2.39	3.21	16.7	12.5	6.5	5.8	8%	9%	4.6%	4.9%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	183.30	13.90	16.80	13.2	10.9	6.5	6.3	6%	6%	2.7%	3.2%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	353.20	41.43	45.31	8.5	7.8	7.1	6.6	6%	6%	12%	5.7%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	88.56	7.69	9.29	11.5	9.5	0.8	0.8	7%	8%	11.3%	11.9%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	234.00	27.01	29.27	8.7	8.0	3.1	2.6	8%	9%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	563.00	60.01	FALSE	9.4	FALSE	5.1	FALSE	8%	FALSE	5.0%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	207.00	0.04	0.06	69.0	49.3	23.5	16.4	3%	5%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unigipar	3.87	0.24	0.27	15.8	14.6	8.7	6.0	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	331.00	22.97	31.92	14.4	10.4	2.4	2.1	33%	10%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1
WH Smith	584.00	56.72	61.98	10.3	9.4	8.5	8.0	1%	7%	3.9%	4.3%	1615.2	1697.8	142.5	152.2	196.6	208.3
Whitbread	2356.00																
Wickes Group	211.50	21.84	26.24	9.7	8.1	4.9	4.3	7%	10%	5.7%	5.7%	1710.3	1779.7	81.7	93.0	206.0	222.8
Wizz Air	902.50	-0.54	-1.95	nm	nm	9.1	5.8	41%	66%								