

Goodbody Market Commentary Metrics



03 March 2026																	
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	8.69	0.81	0.90	10.7	9.7	1.2	1.2			5.0%	6.1%	4569.1	4708.1	2193.7	2275.6		
Air France-KLM	11.14	5.98	7.52	1.9	1.5	3.2	2.9	80%	104%	0.0%	0.0%	34552.6	36037.2	2206.4	2647.0	5404.1	6076.3
Applied Nutrition	245.00	11.41	12.82	21.5	19.1	14.7	12.8	2%	3%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	189.84	21.43	22.68	8.9	8.4	6.2	6.0	13%	13%	5.3%	5.4%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	16.07	1.58	1.83	10.2	8.8	1.2	1.1			4.3%	4.7%	4200.8	4421.8	1813.1	2015.0		
Barratt Redrow	354.20	29.14	35.88	12.2	9.9	0.6	0.6	nm	11%	4.8%	5.8%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2704.00	188.09	228.21	14.4	11.8	0.9	0.8	12%	7%	2.8%	3.4%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	4274.00	342.80	354.08	12.5	12.1	1.1	1.1	4%	10%	2.8%	1.5%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	356.00	29.89	35.36	11.9	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	298.60	22.47	24.51	13.3	12.2	8.7	7.5	8%	8%	9.2%	10.1%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	115.00	0.11	0.11	12.5	12.1	7.7	7.9	5%	6%	4.8%	4.8%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.34	0.23	0.25	10.3	9.4	7.4	6.9	11%	9%	4.3%	4.7%	1045.0	1126.6	177.7	190.4	182.6	196.0
Coca-Cola HBC	4748.00	2.92	3.14	18.6	17.3	11.2	10.4	4%	4%	2.4%	2.6%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6
Compass Group	2253.00	1.46	1.58	20.7	19.0	11.7	11.0	4%	4%	2.4%	2.6%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranwick	5340.00	297.22	315.87	18.0	16.9	9.0	8.4	3%	3%	2.0%	2.1%	2294.5	2175.4	227.9	240.1	325.1	344.0
CBH	117.72	583.63	654.68	20.2	18.0	11.4	10.6	9%	9%	1.3%	1.4%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	5165.00	421.97	505.84	12.2	10.2	7.3	6.8	11%	11%	4.2%	4.4%	14964.1	15168.2	521.6	528.2	788.0	829.2
Devolver Digital	24.50	0.18	0.67	186.6	49.3	10.1	7.3	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1609.00	1.63	1.73	13.2	12.5	11.6	11.0	7%	7%	4.8%	5.1%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4
Dole	15.80	148.96	158.44	10.6	10.0	5.0	4.6	9%	10%	2.4%	2.5%	9311.8	9501.3	298.6	309.3	408.1	418.9
easyJet	450.00	73.47	81.16	6.1	5.5	1.9	1.9	8%	7%	3.4%	3.8%	11209.3	11869.9	738.1	848.5	1613.7	1857.8
Entain	562.80	64.59	77.21	8.7	7.3	6.8	6.5	10%	12%	3.7%	3.9%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	28.10	17.65	FALSE	1.6	FALSE	4.3	FALSE	85%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FRD Holdings	16.40																
Fever-Tree Drinks	939.00	29.23	39.36	32.1	23.9	19.8	15.3	3%	5%	2.0%	2.1%	405.4	444.5	35.8	50.5	50.1	65.1
Flutter Entertainment	103.52	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	184.40	14.50	18.85	12.7	9.8	6.2	4.9	12%	13%	4.1%	4.5%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	388.00	849.11	0.00	0.5	nm	3.0	3.1	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	730.00	43.47	48.57	16.8	15.0	8.6	8.2	4%	5%	3.2%	4.1%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	12670.00	547.81	585.95	32.3	30.2	19.9	18.5	3%	3%	2.8%	3.0%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	20.11	1.45	1.58	13.9	12.7	9.9	8.8	7%	7%	2.5%	2.7%	389.9	404.9	382.4	417.4	530.1	566.4
Glenveagh Properties	2.20	0.21	0.22	10.4	10.0	11.9	10.9	13%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6
Grafton Group	950.50	74.77	80.43	12.7	11.8	6.2	5.7	6%	7%	2.6%	4.4%	2623.2	2724.0	168.3	183.3	321.3	341.3
Greencoat Renewables	0.68	0.05	FALSE	13.3	FALSE	19.7	FALSE	20%	FALSE	10.1%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	261.50	16.21	23.18	16.1	11.3	9.0	6.5	5%	9%	1.9%	2.7%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1571.00	124.39	132.84	12.6	11.8	5.4	4.9	3%	8%	4.0%	4.2%	2305.8	2459.0	189.7	201.4	372.0	401.3
Hammerston	359.60	22.46	26.19	16.0	13.7	0.9	0.9	11%	17%	7.1%	7.0%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	108.50	0.13	0.18	9.7	7.0	6.2	4.3	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	951.00	50.27	53.10	18.9	17.9	10.5	10.2	4%	5%	2.9%	3.0%	2495.9	2592.7	363.2	375.5	526.6	543.1
IAG	400.50	0.78	0.87	5.9	5.3	2.6	2.2	18%	22%	2.2%	2.4%	34358.9	35651.9	5414.3	5569.3	8289.9	8602.6
Ibstock	129.00	7.48	9.52	17.3	13.5	8.9	7.7	7%	8%	2.9%	3.7%	408.3	436.2	41.1	51.7	77.4	86.6
ICG	6.64	0.49	0.54	13.6	12.4	7.8	7.0	4%	12%	2.6%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.07	0.14	0.15	7.8	7.0	0.8	0.7	3%	3%	4.9%	5.3%	67.6	67.6	93.9	102.4	90.4	98.9
J.D. Wetherspoon	705.00	48.97	53.22	14.4	13.2	7.7	7.4	5%	6%	1.7%	1.7%	2243.1	2356.2	141.1	146.1	256.5	262.2
Jet2	1225.00	190.10	189.04	6.4	6.5	1.0	0.9	9%	13%	1.4%	1.5%	7605.5	8182.1	439.5	414.8	777.4	783.6
Kainos Group	744.00	32.66	38.15	22.1	19.5	13.1	11.4	6%	7%	3.3%	3.3%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	73.40	5.01	5.52	14.6	13.3	11.2	10.2	5%	6%	2.1%	2.3%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingfisher	361.80	22.02	23.73	16.4	15.2	6.5	6.0	5%	9%	3.4%	3.4%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	83.00	4.25	4.81	19.5	17.3	13.2	11.9	4%	4%	0.7%	0.8%	9653.7	10379.1	971.5	1069.5	1321.5	1436.5
Lufthansa	8.61	1.24	1.54	7.0	5.6	7.0	6.2	17%	20%	4.3%	5.3%	41784.6	43685.5	2152.9	2614.6	3493.5	3976.2
Manston's	57.80	9.02	10.21	6.4	5.7	7.2	6.7	15%	15%	0.0%	3.5%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	295.00	31.57	33.42	9.3	8.8	6.2	5.9	5%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	452.20	33.24	46.11	13.6	9.8	11.3	8.2	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	851.00	0.53	0.94	18.4	10.4	7.9	6.1	3%	5%	3.0%	4.8%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	127.80	4.20	4.73	30.4	27.0	10.0	9.3	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.28	0.54	0.57	7.9	7.5	5.0	4.8	6%	11%	4.2%	4.3%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.17	0.21	0.29	15.3	11.1	0.8	0.7			2.2%	3.8%	698.1	766.6	171.7	221.2		
Persimmon	1461.00	103.14	116.00	14.2	12.6	1.2	1.2	4%	7%	2.7%	2.9%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	348.50	0.20	0.28	19.9	14.3	0.7	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	92.00	9.81	10.33	9.4	8.9	4.7	4.4	4%	4%	3.2%	3.6%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	26.99	2.09	2.33	12.9	11.6	7.3	6.5	8%	7%	1.6%	1.7%	15448.0	16196.0	2449.7	2663.1	3787.2	4048.8
Smurfit Westrock	46.31	2.39	3.21	19.3	14.4	7.1	6.3	7%	7%	4.0%	4.2%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	191.20	13.90	16.80	13.8	11.4	6.6	6.4	5%	6%	2.6%	3.1%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	367.40	41.43	45.31	8.9	8.1	7.2	6.7	6%	12%	5.5%	5.8%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	110.20	7.69	9.29	14.3	11.9	1.0	1.0	5%	7%	9.1%	9.5%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	295.00	28.01	29.78	10.5	9.9	4.0	3.6	7%	7%	181.2	186.9	38.9	42.3	72.2	72.2		
Travis Perkins	678.00	60.01	FALSE	11.3	FALSE	5.8	FALSE	7%	FALSE	4.1%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	144.50	0.04	0.06	48.3	34.5	16.0	11.0	5%	7%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unigipar	4.13	0.24	0.27	16.9	15.6	9.2	6.4	7%	10%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	670.00	46.20	55.16	14.5	12.1	4.7	3.8	17%	17%	0.0%	0.0%	4249.6	4647.3	371.9	426.5	484.0	558.5
WH Smith	639.00	56.72	61.98	11.3	10.3	8.9	8.3	1%	6%	3.6%	3.9%	1615.2	1697.8	142.5	152.2	196.6	208.3
Whitbread	2541.00																
Wickes Group	246.00	21.84	26.24	11.3	9.4	5.3	4.7	6%	9%	4.9%	4.9%	1710.3	1779.7	81.7	93.0	206.0	222.8
Wizz Air	1146.00	-0.12	0.05														