Goodbody Market Commentary Metrics

Goodbody

03 June 2026																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	lc	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	10.19	0.84	0.92	12.1	11.1	1.5	1.5			5.3%	5.8%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	11.42	3.90	8.34	2.9	1.4	3.7	2.8	61%	101%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2
Applied Nutrition	282.50	11.97	13.20	23.6	21.4	16.6	14.3	1%	3%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2
B&M European Value Reta	170.50	21.15	21.88	8.1	7.8	5.8	5.6	14%	14%	5.9%	6.1%	5771.2	5984.5	353.4	361.6	450.1	460.1
Bank of Ireland	17.54	1.47	1.78	11.9	9.9	1.3	1.2			4.6%	5.4%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	256.80	29.33	24.65	8.8	10.4	0.4	0.4	nm	13%	6.4%	8.0%	5777.8	6093.5	593.6	508.7	598.0	510.8
Beauty Tech Group	343.00	21.04	24.57	16.3	14.0	7.8	6.3	7%	9%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	1815.00	175.84	156.88	10.3	11.6	0.6	0.6	4%	13%	4.1%	5.1%	3036.0	3149.5	312.0	272.6	315.0	275.6
Berkeley Group	3384.00	334.63	290.34	10.1	11.7	0.9	0.9	4%	8%	3.6%	1.9%	2258.6	2014.5	441.3	375.1	425.6	358.4
Breedon Group	276.60	30.07	34.93	9.2	7.9	5.2	4.7	9%	9%	5.7%	6.0%	1786.3	1862.1	142.0	158.9	281.4	302.7
Bytes Technology	381.60	22.47	24.51	17.0	15.6	11.7	10.2	7%	6%	7.2%	7.9%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	93.90	0.11	0.11	10.3	9.9	6.8	7.1	6%	7%	5.9%	5.9%	1586.8	1545.6	71.8	72.5	107.4	108.1
Cairn Homes	2.34	0.23	0.25	10.3	9.2	7.2	6.7	5%	9%	4.9%	5.4%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4216.00	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	32.13	1.48	1.63	21.8	19.7	11.9	11.0	4%	4%	2.3%	2.5%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5410.00	297.22	315.87	18.2	17.1	9.1	8.5	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0
CRH	106.52	585.55	660.57	18.2	16.1	10.4	9.6	9%	10%	1.4%	1.5%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4
DCC	5985.00	437.42	511.23	11.0	11.7	6.3	7.1	12%	9%	4.5%	3.8%	15441.9	16336.2	494.4	563.5	778.3	807.0
Devolver Digital	21.50	0.18	0.67	165.0	43.6	8.3	6.0	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1479.00	1.59	1.61	12.5	12.3	11.1	10.6	7%	7%	2.8%	3.2%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	14.16	135.26	144.02	10.5	9.8	4.7	4.3	12%	13%	2.4%	2.5%	9488.2	9634.5	284.2	293.4	407.7	419.3
easyJet	465.30	10.49	28.37	44.3	16.4	3.6	3.4	nm	nm	3.3%	3.7%	10701.0	11641.6	72.6	330.0	995.0	1349.6
Entain	562.00	60.21	71.83	9.3	7.8	6.6	6.0	10%	12%	3.7%	3.9%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	40.50	17.65	FALSE	2.3	FALSE	4.5	FALSE	59%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.10	1.47	1.57	10.9	10.3	1.2	1.2										
Fever-Tree Drinks	751.50	29.14	39.37	25.8	19.1	15.5	11.8	4%	7%	2.5%	2.6%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	100.99	5.91	9.45	17.1	10.7	9.9	7.2	4%	8%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5
Forterra	138.80	11.51	13.18	12.1	10.5	6.5	5.7	14%	12%	5.2%	5.9%	390.7	420.3	38.1	42.0	57.6	63.0
Frontier Developments	444.50	849.11	0.00	0.5	nm	3.5	3.6	5%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	670.00	43.47	48.57	15.4	13.8	8.1	7.8	4%	5%	3.5%	3.8%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	19590.00	547.81	585.95	35.8	33.4	22.1	20.6	3%	3%	2.5%	2.7%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	25.41	1.50	1.63	16.9	15.6	12.4	11.3	5%	6%	1.9%	2.0%	4107.8	4242.3	409.9	441.6	535.1	567.7
Glenveagh Properties	2.28	0.21	0.23	10.8	10.0	12.4	11.0	14%	10%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	818.60	76.25	86.75	10.7	9.4	5.2	4.7	9%	8%	4.7%	4.8%	2705.7	2857.1	169.5	189.5	322.5	347.5
Greencoat Renewables	0.73	0.05	FALSE	14.2	FALSE	20.3	FALSE	18%	FALSE	9.5%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	193.10	18.17	22.96	10.6	8.4	7.3	5.2	8%	12%	1.5%	2.4%	3498.9	4334.8	225.8	317.8	331.2	447.1
Greggs	1644.00	122.02	122.78	13.5	13.4	5.6	5.3	4%	6%	4.2%	4.2%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	339.60	22.65	24.70	15.0	13.7	0.8	0.8	8%	9%	5.2%	5.6%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	109.00	0.13	0.18	9.8	7.1	6.3	4.4	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	755.00	51.39	57.32	14.7	13.2	8.3	7.7	6%	6%	3.0%	3.2%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	420.50	0.55	0.72	8.9	6.8	4.2	3.7	8%	9%	2.1%	2.3%	34427.4	35954.7	4086.6	4830.7	6487.1	7396.0
Ibstock	97.95	6.26	7.53	15.7	13.0	7.6	6.9	6%	8%	3.2%	3.8%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.30	0.49	0.54	12.9	11.7	7.5	6.7	4%	13%	2.7%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.09	0.13	0.15	8.5	7.4	0.8	0.7	2%	2%	5.3%	5.2%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	615.00	46.03	51.49	13.4	11.9	7.4	7.1	6%	6%	2.0%	2.0%	2222.8	2319.4	132.0	139.1	247.3	255.0
Jet2	1248.00	190.52	113.44	6.6	11.0	0.6	1.6	24%	nm	1.4%	1.4%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	875.00	33.13	43.31	26.4	20.2	16.8	12.5	7%	8%	2.8%	2.8%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	72.90	5.01	5.51	14.5	13.2	11.1	10.1	6%	6%	2.1%	2.3%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4
Kingfisher	282.20	23.42	25.12	12.1	11.2	5.3	5.1	10%	10%	4.4%	4.4%	12945.0	13234.4	651.0	685.9	1327.0	1326.8
Kingspan	77.25	4.18	4.62	18.5	16.7	12.3	11.2	5%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	8.36	1.06	1.52	7.9	5.5	8.0	6.2	18%	21%	3.8%	5.5%	42111.9	43620.3	1779.7	2631.1	3065.1	3942.6
Marston's	46.70	9.02	10.21	5.2	4.6	6.8	6.4	19%	19%	0.0%	4.3%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	228.50	31.57	33.42	7.2	6.8	5.4	5.0	7%	8%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	593.00	59.68	42.69	9.9	13.9	7.7	10.8	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9
Mondi	739.40	0.45	0.72	19.2	11.9	7.7	6.4	3%	3%	2.9%	4.2%	8180.1	8523.7	399.5	578.5	917.9	1092.9
NCC Group	149.00	4.20	4.73	35.4	31.5	11.4	10.7	3%	4%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.60	0.54	0.57	8.4	8.1	5.3	5.1	5%	10%	4.0%	4.2%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.93	0.23	0.27	13.0	10.8	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9		
Persimmon	1070.00	86.62	92.96	12.4	11.5	0.9	0.9	nm	6%	3.7%	4.0%	3865.0	4106.3	429.3	458.7	453.3	485.8
Playtech	345.80	0.22	0.29	17.9	13.6	0.6	0.6	4%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	98.30	9.81	10.33	10.0	9.5	5.0	4.6	4%	8%	3.0%	3.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	24.70	2.12	1.85	11.9	13.3	6.5	7.0	6%	6%	1.7%	1.9%	15544.3	16091.1	2459.2	2148.1	3832.6	3570.1
Smurfit Westrock	3132.00	2.17	2.83	19.4	14.9	6.9	6.3	7%	7%	4.3%	4.6%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	165.80	13.90	16.67	11.9	9.9	6.4	6.1	5%	7%	3.0%	3.5%	3825.4	3979.6	297.7	330.3	635.0	677.9
Tate & Lyle	500.50	40.50	36.60	11.2	13.7	7.4	7.9	8%	8%	4.4%	4.0%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	76.30	5.27	6.09	14.5	12.5	0.7	0.7	3%	15%	7.9%	9.2%	3767.5	3993.3	287.3	325.9	293.6	333.4
Everplay Group	270.00	27.01	29.27	10.0	9.2	3.7	3.2	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	537.50	60.01	FALSE	9.0	FALSE	5.0	FALSE	9%	FALSE	5.2%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	248.20	0.04	0.06	83.6	59.7	28.7	20.3	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.69	0.26	0.28	18.1	16.8	10.3	7.4	nm	9%	0.4%	0.4%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	262.40	43.67	61.44	6.0	4.3	2.8	1.9	32%	6%	0.0%	0.0%	4301.4	4532.5	290.8	356.6	356.9	446.5
WH Smith	513.00	48.12	50.21	10.7	10.2	6.1	5.8	nm	3%	0.0%	2.5%	1597.7	1620.9	124.8	129.6	178.3	183.1
Whitbread	2292.00																
Wickes Group	171.80	21.94	26.33	7.8	6.5	4.7	4.1	5%	12%	7.0%	8.1%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	1039.00	-0.54	-1.95	nm	nm	9.3	6.0	36%	57%	0.0%	0.0%	5804.3	6899.2	28.2	-118.9	1168.3	1190.9

Closing prices as of: 02/06/2026