

Goodbody Market Commentary Metrics



03 December 2025																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	8.89	0.82	0.90	10.9	9.8	1.3	1.2			4.9%	6.0%	4563.4	4702.4	2188.1	2269.9		
Air France-KLM	11.17	5.23	5.66	2.1	2.0	3.3	3.0	53%	80%	0.0%	0.0%	34235.8	35682.0	2000.2	2117.3	5017.9	5256.6
Applied Nutrition	190.20	10.12	11.46	18.8	16.6	12.8	10.9	4%	4%	0.0%	0.0%	121.3	136.1	33.2	37.5	34.3	38.6
B&M European Value Ret	161.75	24.04	26.87	6.7	6.0	5.1	4.9	17%	15%	6.5%	7.5%	5812.2	6077.1	392.9	419.7	490.2	519.6
Bank of Ireland	16.23	1.56	1.81	10.4	8.9	1.2	1.1			4.3%	4.6%	4181.7	4414.4	1794.1	2007.6		
Bakkavor Group	233.00																
Barratt Redrow	381.80	29.14	36.44	13.1	10.5	0.7	0.7	6%	8%	4.5%	5.4%	5859.2	6478.5	600.5	739.6	609.1	745.9
Bellway	2768.00	197.69	231.31	14.0	12.0	0.9	0.8	8%	5%	2.9%	3.3%	2999.9	3212.9	337.6	390.9	337.7	391.1
Berkeley Group	3590.00	317.54	342.01	11.3	10.5	1.0	0.9	6%	9%	3.4%	1.8%	2374.4	2446.8	444.0	469.0	435.0	459.4
Breedon Group	323.20	29.86	35.16	10.8	9.2	5.7	5.1	9%	9%	4.9%	5.2%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bytes Technology	338.40	23.50	26.39	14.4	12.8	9.8	8.2	7%	8%	8.5%	9.6%	228.1	250.9	67.0	77.2	68.7	79.2
C & C Group	126.20	0.12	0.14	12.1	10.5	7.6	7.3	6%	8%	4.5%	4.7%	1652.6	1673.8	79.7	85.2	115.3	120.8
Cairn Homes	2.01	0.23	0.24	8.9	8.3	6.4	6.5	17%	14%	5.0%	5.5%	1045.0	1088.4	177.7	185.0	182.6	190.7
Coca-Cola HBC	3764.00	2.86	3.10	15.0	13.8	9.2	8.5	4%	5%	2.9%	3.2%	12191.1	12895.9	1447.1	1561.2	1872.2	1998.0
Compass Group	2336.00	1.44	1.56	21.4	19.8	12.0	11.3	4%	4%	2.3%	2.5%	50221.3	53448.4	3654.2	3916.5	5022.0	5300.0
Cranswick	5050.00	291.57	310.55	17.3	16.3	8.7	8.1	3%	3%	2.1%	2.2%	2942.6	3119.6	219.7	231.7	316.0	333.7
CRH	118.61	585.33	655.23	20.3	18.1	11.8	10.9	8%	9%	1.3%	1.4%	39902.0	41603.7	6011.0	6485.0	8197.6	8755.5
DCC	5010.00	433.35	498.92	11.6	10.0	7.1	6.6	12%	12%	4.3%	4.5%	14959.5	15055.9	521.4	549.3	787.9	819.1
Devolver Digital	24.50	0.18	0.67	184.2	48.6	9.9	7.2	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1724.50	1.70	1.80	13.4	12.7	11.0	10.4	6%	7%	4.5%	4.8%	20474.4	21280.1	6066.3	6358.2	6673.0	6964.2
Dole	14.50	148.86	158.22	9.7	9.2	4.6	4.2	9%	11%	2.6%	2.7%	9085.1	9270.0	298.4	309.0	408.0	418.5
easyJet	492.60	78.55	87.03	6.3	5.7	2.0	2.1	10%	7%	3.1%	3.5%	10841.7	11468.9	829.1	921.7	1688.7	1876.9
Entain	788.60	75.64	92.76	10.4	8.5	7.4	6.8	9%	11%	2.6%	2.8%	5602.0	5859.9	934.9	1441.9	1213.0	1291.8
Evoke	25.10	17.65	FALSE	1.4	FALSE	4.3	FALSE	95%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FRD Holdings	15.60																
Fever-Tree Drinks	801.00	28.99	37.75	27.6	21.2	16.6	13.1	4%	5%	2.3%	2.5%	411.5	451.3	35.2	47.5	50.2	63.6
Flutter Entertainment	210.71	12.07	15.76	17.5	13.4	11.0	9.0	6%	8%	0.0%	0.0%	19780.1	21813.4	3522.1	4277.1	4234.2	5062.4
Forterra	180.80	14.50	18.85	12.5	9.6	6.1	4.8	12%	14%	3.8%	5.0%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	524.00	849.11	0.00	0.6	nm	4.2	4.3	4%	5%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	666.00	43.47	48.57	15.3	13.7	8.1	7.7	4%	5%	3.5%	3.8%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	19640.00	547.81	585.95	35.9	33.5	22.2	20.6	3%	3%	2.5%	2.7%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	16.89	1.45	1.56	11.7	10.8	8.3	7.4	8%	9%	2.9%	3.2%	3863.0	3999.9	382.9	414.2	531.1	562.9
Glanvagh Properties	1.93	0.21	0.21	9.2	9.2	9.9	9.2	15%	11%	0.0%	0.0%	1072.3	1061.8	146.5	146.2	149.9	149.6
Grafton Group	928.90	74.93	81.31	12.4	11.4	6.0	5.5	6%	7%	4.3%	4.5%	2634.4	2734.3	168.7	185.4	321.7	343.4
Greencoast Renewables	0.74	0.14	FALSE	5.1	FALSE	15.0	FALSE	19%	FALSE	10.1%	FALSE	215.4	FALSE	187.9	FALSE	187.9	FALSE
Greencore	245.00																
Greggs	1614.00	132.76	143.97	12.2	11.2	5.5	4.9	4%	8%	4.1%	4.5%	2354.7	2568.2	199.2	215.2	384.5	419.0
Hammerson	321.00																
Hostelworld Group	125.50	0.15	FALSE	9.8	FALSE	6.0	FALSE	12%	FALSE	0.0%	FALSE	107.8	FALSE	12.1	FALSE	24.0	FALSE
Howden Joinery	824.50	50.52	53.31	16.3	15.5	9.2	8.9	5%	5%	3.3%	3.5%	2512.5	2609.6	365.0	376.9	528.4	544.6
IAG	389.30	0.75	0.83	5.9	5.4	2.6	2.3	18%	21%	2.3%	2.4%	34276.4	35566.3	5195.8	5288.9	8071.3	8322.2
Ibstock	133.00	11.12	14.44	12.0	9.2	7.0	5.7	10%	12%	4.2%	5.4%	426.6	471.2	61.0	78.7	99.0	116.4
ICG	6.00	0.47	0.52	12.8	11.6	7.3	6.5	4%	4%	13%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	0.97	0.13	0.15	7.3	6.5	0.7	0.0	3%	3%	5.2%	5.5%	67.6	69.9	92.0	100.6	89.4	98.0
J.D. Wetherspoon	704.50	53.97	61.14	13.1	11.5	7.7	7.3	6%	6%	1.7%	1.7%	2223.5	2339.3	151.2	160.8	264.7	275.1
Je2	1340.00	194.54	225.28	6.9	5.9	1.2	0.7	14%	18%	1.4%	1.6%	7565.2	8341.1	450.6	511.9	782.8	887.0
Kaines Group	1056.00	33.66	38.15	31.4	27.7	19.5	17.0	4%	5%	2.3%	2.4%	395.6	413.9	39	58.9	59.8	67.8
Kerry Group	78.20	5.41	5.96	14.4	13.1	11.0	9.9	5%	6%	2.0%	2.2%	7110.7	7397.2	1017.4	1112.5	1321.9	1419.1
Kingsfisher	309.10	19.97	21.82	15.5	14.2	5.9	5.5	8%	8%	4.0%	4.0%	12842.4	13263.8	608.8	643.1	1272.8	1327.4
Kingspan	72.80	4.25	4.81	17.1	15.1	11.8	10.6	5%	5%	0.9%	0.9%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5
Lufthansa	8.30	1.24	1.54	6.7	5.4	6.7	5.8	18%	21%	4.5%	5.6%	41656.1	43551.9	2156.2	2615.4	3554.4	4067.9
Manston's	60.20	9.02	10.21	6.7	5.9	7.3	6.8	14%	15%	0.0%	3.3%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	282.50	31.57	33.42	8.9	8.5	6.1	5.7	6%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	454.60	33.24	46.11	13.7	9.9	11.4	8.2	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8
Mondi	857.20	0.90	1.18	10.8	8.3	6.6	5.8	4%	7%	6.3%	6.7%	8072.4	8651.9	658.6	810.1	1134.8	1294.6
NCC Group	146.00	7.09	8.93	20.6	16.3	8.5	7.2	5%	7%	0.1%	0.1%	348.7	369.7	35.1	42.8	55.9	63.7
Origin Enterprises	3.91	0.54	0.57	7.2	6.9	4.7	4.5	6%	12%	4.7%	4.9%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.11	0.21	0.29	15.1	10.9	0.7	0.7			2.3%	3.9%	698.1	766.6	171.7	221.2		
Persimmon	1340.00	104.31	122.04	12.8	11.0	1.1	1.1	4%	8%	3.0%	3.2%	3758.4	4062.8	489.6	568.8	514.9	597.1
Playtech	285.50	0.20	0.28	16.2	11.6	0.5	0.5	3%	6%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	102.60	10.62	13.56	9.7	7.6	4.9	4.0	5%	10%	3.1%	4.2%	852.6	919.9	72.4	90.4	128.2	148.8
Ryanair	27.70	2.07	2.29	13.4	12.1	7.5	6.6	9%	9%	1.5%	1.7%	15392.3	16131.4	2415.2	2571.2	3732.4	3938.7
Smurfit Westrock	34.55	2.88	3.89	12.0	8.9	5.9	5.0	7%	10%	4.6%	5.6%	31816.5	33792.7	2602.6	3236.2	5281.6	6049.3
SSP Group	148.00	13.48	16.62	11.0	8.9	6.3	6.1	4%	5%	3.2%	3.9%	3812.8	4029.3	287.3	317.2	633.3	668.8
Tate & Lyle	365.20	41.43	45.31	8.8	8.1	7.2	6.7	6%	12%	5.5%	5.8						