

Goodbody Market Commentary Metrics



December 2025																	
	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	8.85	0.82	0.90	10.8	9.8	1.3	1.2			4.9%	6.0%	4563.4	4702.4	2188.1	2269.9		
Air France-KLM	11.07	5.23	5.66	2.1	2.0	3.3	3.0	53%	81%	0.0%	0.0%	34235.8	35682.0	2000.2	2117.3	5017.9	5256.6
Applied Nutrition	198.60	10.12	11.46	19.6	17.3	13.5	11.4	3%	4%	0.0%	0.0%	121.3	136.1	33.2	37.5	34.3	38.6
BAM European Value Ret	163.10	24.04	26.87	6.8	6.1	5.1	4.9	17%	15%	6.4%	7.4%	5812.2	6077.1	392.9	419.7	490.2	519.6
Bank of Ireland	16.08	1.56	1.81	10.3	8.9	1.2	1.1			4.3%	4.7%	4181.7	4414.4	1794.1	2007.6		
Bakkavor Group	234.00																
Barratt Redrow	374.10	29.14	36.44	12.8	10.3	0.7	0.7	6%	8%	4.5%	5.5%	5859.2	6478.5	600.5	739.6	609.1	745.9
Bellway	2748.00	197.69	231.31	13.9	11.9	0.9	0.8	8%	5%	2.9%	3.3%	2999.9	3212.9	337.6	390.9	337.7	391.1
Berkeley Group	3678.00	317.54	342.01	11.6	10.8	1.0	1.0	6%	8%	3.3%	1.8%	2374.4	2446.8	444.0	469.0	435.0	459.4
Breedon Group	323.00	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	340.60	23.50	26.39	14.5	12.9	9.9	8.2	7%	8%	8.5%	9.6%	228.1	250.9	67.0	77.2	68.7	79.2
C & C Group	125.00	0.12	0.14	12.0	10.5	7.6	7.3	6%	8%	4.5%	4.8%	1652.6	1673.8	79.7	85.2	115.3	120.8
Cairn Homes	1.99	0.23	0.24	8.8	8.3	6.4	6.4	17%	14%	5.0%	5.5%	1045.0	1088.4	177.7	185.0	182.6	190.7
Coca-Cola HBC	3700.00	2.86	3.10	14.8	13.6	9.1	8.4	4%	5%	3.0%	3.2%	12191.1	12895.9	1447.1	1561.2	1872.2	1998.0
Compass Group	2327.00	1.44	1.56	21.5	19.9	12.1	11.4	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	121.36	585.33	655.23	20.7	18.5	12.0	11.2	8%	9%	1.3%	1.3%	39902.0	41603.7	6011.0	6485.0	8197.6	8755.5
DCC	4994.00	433.35	498.92	11.5	10.0	7.1	6.5	12%	12%	4.3%	4.6%	14959.5	15055.9	521.4	549.3	787.9	819.1
Devolver Digital	24.50	0.18	0.67	186.0	49.1	10.1	7.3	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1750.00	1.70	1.80	13.7	13.0	11.2	10.6	6%	7%	4.4%	4.7%	20474.4	21280.1	6066.3	6358.2	6673.0	6964.2
Dole	14.73	148.86	158.22	9.9	9.3	4.7	4.3	9%	11%	2.5%	2.7%	9085.1	9270.0	298.4	309.0	408.0	418.5
easyJet	485.50	72.79	80.15	6.7	6.1	2.1	2.2	6%	4%	3.2%	3.5%	11136.1	11799.0	727.3	834.1	1617.4	1847.2
Entain	785.80	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	25.40	17.65	FALSE	1.4	FALSE	4.3	FALSE	94%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FRD Holdings	15.45																
Fever-Tree Drinks	806.00	28.99	37.75	27.8	21.4	16.8	13.2	4%	5%	2.3%	2.4%	411.5	451.3	35.2	47.5	50.2	63.6
Flutter Entertainment	209.50	12.07	15.76	17.4	13.3	10.9	9.0	6%	8%	0.0%	0.0%	19780.1	21813.4	3522.1	4277.1	4234.2	5062.4
Forterra	182.00	14.50	18.85	12.6	9.7	6.1	4.8	12%	14%	3.7%	4.9%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	526.00	849.11	0.00	0.6	nm	4.2	4.4	4%	5%	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%	3.8%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	19840.00	547.81	585.95	36.2	33.9	22.4	20.8	3%	3%	2.5%	2.6%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	17.32	1.45	1.56	12.0	11.1	8.5	7.6	8%	8%	2.9%	3.1%	3863.0	3999.9	382.9	414.2	531.1	562.9
Glanvagh Properties	1.96	0.21	0.21	9.3	9.3	10.1	9.3	14%	11%	0.0%	0.0%	1072.3	1061.8	146.5	146.2	149.9	149.6
Grafton Group	919.10	74.93	81.31	12.3	11.3	6.0	5.4	6%	7%	4.4%	4.6%	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	247.50																
Greggs	1575.00	132.76	143.97	11.9	10.9	5.4	4.8	4%	9%	4.2%	4.6%	2354.7	2568.2	199.2	215.2	384.5	419.0
Hammerson	317.60																
Hostelworld Group	127.00	0.15	FALSE	10.0	FALSE	6.1	FALSE	11%	FALSE	0.0%	FALSE	107.8	FALSE	12.1	FALSE	24.0	FALSE
Howden Joinery	817.50	50.52	53.31	16.2	15.3	9.1	8.8	5%	5%	3.4%	3.5%	2512.5	2609.6	365.0	376.9	528.4	544.6
JAG	390.90	0.75	0.83	6.0	5.4	2.6	2.3	18%	21%	2.3%	2.4%	34276.4	35566.3	5195.8	5288.9	8071.3	8322.2
Jbstock	134.60	11.12	14.44	12.1	9.3	7.1	5.7	10%	12%	4.2%	5.4%	426.6	471.2	61.0	78.7	99.0	116.4
JCG	6.00	0.47	0.52	12.8	11.6	7.3	6.5	4%	13%	2.9%	3.0%	675.3	693.4	83.5	88.1	150.5	155.1
JRES REIT	0.96	0.13	0.15	7.2	6.4	0.7	0.0	3%	3%	5.2%	5.6%	67.6	69.9	92.0	100.6	89.4	98.0
J.D. Wetherspoon	690.00	53.97	61.14	12.8	11.3	7.6	7.2	6%	7%	1.7%	1.8%	2223.5	2339.3	151.2	160.8	264.7	275.1
Je2	1334.00	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	1072.00	33.66	38.15	31.9	28.1	19.8	17.3	4%	5%	2.3%	2.3%	395.6	413.9	39.9	58.9	59.8	67.8
Kerry Group	78.70	5.41	5.96	14.5	13.2	11.1	10.0	5%	6%	2.0%	2.1%	7110.7	7397.2	1017.4	1112.5	1321.9	1419.1
Kingsfisher	311.10	19.97	21.82	15.6	14.3	6.0	5.5	8%	8%	4.0%	4.0%	12842.4	13263.8	608.8	643.1	1272.8	1327.4
Kingspan	73.90	4.25	4.81	17.4	15.4	11.9	10.8	5%	5%	0.8%	0.9%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5
Lufthansa	8.21	1.24	1.54	6.6	5.3	6.6	5.8	18%	21%	4.5%	5.6%	41656.1	43551.9	2156.7	2615.4	3554.4	4067.9
Manston's	62.20	9.02	10.21	6.9	6.1	7.3	6.8	14%	14%	0.0%	3.2%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	272.00	31.57	33.42	8.6	8.1	6.0	5.6	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	463.00	33.24	46.11	13.9	10.0	11.6	8.4	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8
Mondi	854.00	0.90	1.18	10.9	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	145.80	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	3.86	0.54	0.57	7.1	6.8	4.7	4.5	6%	12%	4.7%	4.9%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.12	0.21	0.29	15.1	10.9	0.8	0.7			2.2%	3.8%	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	284.00	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	104.60	10.62	13.56	9.8	7.7	4.9	4.1	5%	10%	3.0%	4.1%	852.6	919.9	72.4	90.4	128.2	148.8
Ryanair	27.72	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	35.50	2.88	3.89	12.3	9.1	5.9	5.0	7%	10%	4.5%	5.5%	31816.5	33792.7	2602.6	3236.2	5281.6	6049.3
SSP Group	148.10	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	367.40	41.43	45.31	8.9	8.1	7.2	6.7	6%	12%	5.5%	5.8%						