

Goodbody Market Commentary Metrics



February 2026																		
	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	9.78	0.82	0.90	12.0	10.8	1.4	1.3			4.5%	5.4%	4563.4	4702.4	2188.1	2269.9			
Air France-KLM	11.43	5.23	5.66	2.2	2.0	3.3	3.0	51%	78%	0.0%	0.0%	34235.8	35682.0	2000.2	2117.3	5017.9	5256.6	
Applied Nutrition	240.00	10.87	12.23	22.1	19.6	15.1	13.1	2%	3%	0.0%	0.0%	134.8	150.5	36.4	40.4	37.9	42.0	
B&M European Value Ret	175.00	21.43	22.68	8.2	7.7	5.9	5.7	14%	14%	5.7%	5.8%	5771.2	5996.4	357.3	368.3	454.0	466.9	
Bank of Ireland	17.72	1.56	1.81	11.3	9.8	1.3	1.2			3.9%	4.2%	4181.7	4414.4	1794.1	2007.6			
Barratt Redrow	394.20	29.14	35.88	13.5	11.0	0.7	0.6	nm	10%	4.3%	5.2%	5805.3	6417.2	609.3	726.2	613.7	727.7	
Bellway	2738.00	188.09	228.21	14.6	12.0	0.9	0.8	12%	7%	2.7%	3.4%	3003.0	3216.2	332.4	388.1	335.4	388.7	
Berkeley Group	4164.00	342.80	354.08	12.1	11.8	1.1	1.0	4%	10%	2.9%	1.5%	2270.4	2331.6	452.2	459.2	441.0	447.0	
Breedon Group	349.00	29.89	35.36	11.7	9.9	6.0	5.4	8%	9%	4.6%	4.8%	1763.2	1848.1	159.6	178.8	282.8	306.8	
Bytes Technology	320.60	23.50	26.39	13.6	12.1	9.2	7.6	8%	9%	9.0%	10.2%	228.1	250.9	67.0	77.2	68.7	79.2	
C & C Group	109.80	0.11	0.11	12.1	11.7	7.5	7.7	5%	6%	5.0%	5.0%	1586.8	1525.6	71.8	71.8	107.4	107.4	
Cairn Homes	2.13	0.23	0.24	9.4	8.8	6.6	6.2	12%	8%	4.7%	5.2%	1045.0	1088.4	177.7	185.0	182.6	190.7	
Coca-Cola HBC	4068.00	2.89	3.13	16.3	15.1	10.0	9.2	4%	4%	2.7%	2.9%	12315.3	13029.4	1465.0	1580.5	1894.4	2021.9	
Compass Group	2164.00	1.44	1.56	20.6	19.0	11.6	11.0	4%	4%	2.4%	2.6%	50221.3	53448.4	3654.2	3916.5	5022.0	5300.0	
Cranswick	5280.00	297.22	315.87	17.8	16.7	8.9	8.4	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0	
CRH	122.01	585.31	655.21	20.8	18.6	11.9	11.1	8%	8%	1.3%	1.3%	39902.0	41603.7	6010.9	6484.8	8197.4	8755.4	
DCC	4640.00	421.97	505.84	11.0	9.2	6.7	6.2	12%	13%	4.7%	4.9%	14964.1	15168.2	521.6	559.4	788.0	829.2	
Devolver Digital	26.00	0.18	0.67	202.9	53.6	11.5	8.3	6%	7%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8	
Diageo	1697.00	1.63	1.73	14.3	13.5	12.2	11.5	6%	6%	4.4%	4.7%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4	
Dole	16.14	148.86	158.22	10.8	10.2	5.0	4.6	8%	10%	2.3%	2.5%	9085.1	9270.0	298.4	309.0	408.0	418.5	
easyJet	490.60	73.47	81.16	6.7	6.0	2.1	2.1	7%	7%	3.2%	3.5%	11209.3	11869.9	738.1	848.5	1613.7	1857.8	
Entain	586.60	64.59	77.21	9.1	7.6	6.9	6.7	10%	12%	3.5%	3.7%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7	
Evoke	26.30	17.65	FALSE	1.5	FALSE	4.3	FALSE	91%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE	
FRD Holdings	16.00																	
Fever-Tree Drinks	876.00	28.99	37.75	30.2	23.2	18.4	14.5	4%	5%	2.1%	2.2%	411.5	451.3	35.2	47.5	50.2	63.6	
Flutter Entertainment	155.60	12.07	15.76	12.9	9.9	8.7	7.1	8%	11%	0.0%	0.0%	19780.1	21813.4	3522.1	4277.1	4234.2	5062.4	
Forterra	181.60	14.50	18.85	12.5	9.6	6.1	4.8	12%	14%	3.7%	5.0%	413.7	448.9	49.9	62.1	74.3	87.3	
Frontier Developments	465.50	849.11	0.00	0.5	nm	3.7	3.8	4%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3	
Fuller, Smith & Turner	688.00	43.47	48.57	15.8	14.2	8.3	7.9	4%	5%	3.4%	3.7%	396.2	413.5	43.2	47.6	73.3	76.9	
Games Workshop Group	16770.00	547.81	585.95	30.6	28.6	18.9	17.6	3%	3%	2.9%	3.1%	625.0	671.8	238.5	254.4	283.9	305.1	
Glanbia	19.39	1.45	1.58	13.4	12.3	9.5	8.5	7%	7%	2.6%	2.8%	3890.9	4044.9	382.4	417.4	530.1	566.4	
Glenveagh Properties	1.99	0.21	0.22	9.4	9.1	10.8	9.9	14%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.1	150.6	
Grafton Group	943.80	74.77	80.43	12.6	11.7	6.1	5.6	6%	7%	4.2%	4.5%	2623.2	2724.0	168.3	183.3	321.3	341.3	
Greencore Renewables	0.68	0.14	FALSE	4.7	FALSE	14.6	FALSE	21%	FALSE	11.0%	FALSE	215.4	FALSE	187.9	FALSE	187.9	FALSE	
Greencore	301.50	16.21	23.18	18.6	13.0	10.0	7.2	4%	8%	1.6%	2.3%	3504.5	4372.9	224.8	318.0	330.1	447.2	
Groeps	1621.00	124.39	132.84	13.0	12.2	5.5	5.0	3%	7%	3.8%	4.1%	2305.8	2459.0	189.7	201.4	372.0	401.3	
Hammerson	352.80	22.46	26.19	15.7	13.5	0.9	0.9	11%	17%	7.2%	7.1%	215.0	242.6	178.0	203.8	177.0	201.8	
Hostelworld Group	115.00	0.15	FALSE	9.2	FALSE	5.5	FALSE	12%	FALSE	0.0%	FALSE	107.8	FALSE	12.1	FALSE	24.0	FALSE	
Howden Joinery	849.50	50.52	53.31	16.8	15.9	9.5	9.1	5%	5%	3.2%	3.4%	2512.5	2609.6	365.0	376.9	528.4	544.6	
IAG	432.90	0.75	0.83	6.7	6.1	2.8	2.6	16%	19%	2.0%	2.2%	34276.4	35566.3	5195.8	5288.9	8071.3	8322.2	
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	6.24	0.49	0.54	12.8	11.6	7.4	6.6	4%	13%	2.7%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1	
IRIS REIT	1.06	0.14	0.15	7.8	6.9	0.8	0.7	3%	3%	5.0%	5.3%	67.6	69.9	93.9	102.4	90.4	98.9	
J D Wetherspoon	667.00	48.97	53.22	13.6	12.5	7.5	7.3	6%	6%	1.8%	1.8%	2243.1	2356.2	141.1	146.1	256.5	262.3	
Jet2	1256.00	187.52	199.17	6.7	6.3	1.4	1.1	9%	16%	1.4%	1.4%	7595.5	8223.8	432.0	440.2	770.2	810.0	
Kamos Group	879.00	33.66	38.15	24.9	22.0	15.1	13.1	5%	6%	2.9%	3.0%	395.6	413.9	51.9	58.9	59.8	67.8	
Kerry Group	73.65	5.35	5.89	13.8	12.5	10.4	9.3	5%	6%	2.1%	2.3%	7072.9	7358.0	1007.1	1101.6	1309.5	1406.0	
Kingsfisher	337.90	22.02	23.73	15.3	14.2	6.2	5.7	5%	9%	3.7%	3.7%	12956.6	13317.9	658.7	673.6	1328.9	1359.4	
Kingspan	74.70	4.25	4.81	17.6	15.5	12.0	10.9	5%	5%	0.8%	0.9%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5	
Lufthansa	8.99	1.24	1.54	7.3	5.9	6.9	6.0	16%	19%	4.1%	5.1%	41656.1	43551.9	2156.2	2615.4	3554.4	4067.9	
Manston's	60.50	9.02	10.21	6.7	5.9	7.3	6.8	14%	14%	0.0%	3.3%	908.6	930.0	166.0	174.5	211.6	220.0	
Mitchells & Butlers	263.50	31.57	33.42	8.3	7.9	5.8	5.5	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1	
Molten Ventures	488.00	33.24	46.11	14.7	10.6	12.2	8.8	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8	
Mondi	857.20	0.89	1.10	11.1	9.0	6.8	6.1	3%	6%	6.1%	6.6%	7951.4	8356.1	651.6	765.8	1120.7	1233.8	
NCC Group	135.00	4.20	4.73	32.1	28.5	10.5	9.8	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%	4.5%	2129.2	2173.2	86.3	89.1	120.8	125.4	
Permanent TSB	3.14	0.21	0.29	15.2	11.0	0.8	0.7			2.2%	3.8%	698.1	766.6	171.7	221.2			
Persimmon	1447.00	103.14	116.00	14.0	12.5	1.2	1.1	4%	7%	2.8%	2.9%	3861.4	4154.5	494.9	548.6	520.6	577.3	
Playtech	279.50	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	88.40	9.81	10.33	9.0	8.6	4.6	4.3	5%	8%	3.3%	3.7%	852.6	919.9	67.6	71.2	123.4	129.6	
Ryanair	28.98	2.10	2.32	13.8	12.5	7.7	6.9	10%	7%	1.4%	1.6%	15448.0	16196.0	2451.5	2639.1	3789.1	4024.8	
Smurfit Westrock	41.52	2.84	3.88	14.6	10.7	6.5	5.7	6%	8%	3.8%	4.7%	32397.6	34040.7	2587.4	3228.4	5312.1	5959.1	