Goodbody Market Commentary Metrics

Goodbody

05 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	10.20	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	11.47	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	281.00	11.97	13.20	23.5	21.3	16.5	14.2	1%	3%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2
B&M European Value Reta	208.20	21.15	21.88	9.8	9.5	6.7	6.4	12%	11%	4.8%	5.0%	5771.2	5984.5	353.4	361.6	450.1	460.1
Bank of Ireland	17.47	1.47	1.78	11.9	9.8	1.3	1.2			4.6%	5.4%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	262.60	29.33	24.65	9.0	10.7	0.4	0.4	nm	13%	6.3%	7.8%	5777.8	6093.5	593.6	508.7	598.0	510.8
Beauty Tech Group	330.00	21.04	24.57	15.7	13.4	7.5	6.0	8%	10%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	1829.00	175.84	156.88	10.4	11.7	0.6	0.6	4%	12%	4.1%	5.1%	3036.0	3149.5	312.0	272.6	315.0	275.6
Berkeley Group	3480.00	334.63	290.34	10.4	12.0	0.9	0.9	3%	7%	3.5%	1.9%	2258.6	2014.5	441.3	375.1	425.6	358.4
Breedon Group	276.20	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	382.00	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	92.20	0.11	0.11	10.1	9.7	6.8	7.0	6%	8%	6.0%	6.0%	1586.8	1545.6	71.8	72.5	107.4	108.1
Cairn Homes	2.37	0.23	0.25	10.4	9.3	7.3	6.8	5%	9%	4.9%	5.3%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4236.00	2.92	3.14	16.8	15.6	10.2	9.4	4%	4%	2.6%	2.8%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	32.51	1.48	1.63	22.0	20.0	12.1	11.2	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	106.57	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	6025.00	437.42	511.23	11.0	11.8	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	164.6	43.5	8.3	6.0	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1473.00	1.59	1.61	12.5	12.3	11.0	10.5	7%	7%	2.8%	3.3%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	13.93	135.26	144.02	10.3	9.7	4.6	4.2	12%	13%	2.4%	2.6%	9488.2	9634.5	284.2	293.4	407.7	419.3
easyJet	470.10	10.49	28.37	44.8	16.6	3.7	3.5	nm	nm	3.3%	3.6%	10701.0	11641.6	72.6	330.0	995.0	1349.6
Entain	571.40	60.21	71.83	9.5	8.0	6.6	6.1	10%	12%	3.6%	3.8%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	40.00	17.65	FALSE	2.3	FALSE	4.5	FALSE	60%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.50	1.47	1.57	11.2	10.5	1.3	1.3										
Fever-Tree Drinks	738.50	29.14	39.37	25.3	18.8	15.2	11.6	4%	7%	2.5%	2.6%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	103.25	5.91	9.45	17.5	10.9	10.1	7.3	4%	8%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5
Forterra	135.80	11.51	13.18	11.8	10.3	6.4	5.6	15%	13%	5.3%	6.0%	390.7	420.3	38.1	42.0	57.6	63.0
Frontier Developments	461.50	849.11	0.00	0.5	nm	3.6	3.8	4%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	668.00	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	19100.00	547.81	585.95	34.9	32.6	21.6	20.1	3%	3%	2.6%	2.7%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	25.33	1.50	1.63	16.9	15.6	12.3	11.2	5%	6%	1.9%	2.0%	4107.8	4242.3	409.9	441.6	535.1	567.7
Glenveagh Properties	2.34	0.21	0.23	11.1	10.2	12.7	11.3	13%	9%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	825.00	76.25	86.75	10.8	9.5	5.3	4.7	9%	8%	4.7%	4.8%	2705.7	2857.1	169.5	189.5	322.5	347.5
Greencoat Renewables	0.77	0.05	FALSE	15.1	FALSE	20.8	FALSE	17%	FALSE	8.9%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	192.50	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	1682.00	122.02	122.78	13.8	13.7	5.7	5.4	4%	6%	4.1%	4.1%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	334.40	22.65	24.70	14.8	13.5	0.8	0.8	8%	9%	5.3%	5.6%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	111.00	0.13	0.18	10.0	7.3	6.5	4.5	12%	18%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	780.00	51.39	57.32	15.2	13.6	8.5	8.0	6%	6%	2.9%	3.1%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	421.30	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	94.70	6.26	7.53	15.1	12.6	7.4	6.7	6%	9%	3.4%	4.0%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.18	0.49	0.54	12.6	11.5	7.3	6.6	4%	13%	2.8%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.10	0.13	0.15	8.6	7.4	0.8	0.7	2%	2%	5.2%	5.2%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	616.50	46.03	51.49	13.4	12.0	7.4	7.1	6%	6%	1.9%	1.9%	2222.8	2319.4	132.0	139.1	247.3	255.0
Jet2	1261.00	190.52	113.44	6.6	11.1	0.6	1.6	24%	nm	1.4%	1.4%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	878.00	33.13	43.31	26.5	20.3	16.8	12.5	7%	7%	2.8%	2.8%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	71.95	5.01	5.51	14.4	13.1	11.0	10.0	6%	6%	2.1%	2.4%	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	81.20	4.18	4.62	19.4	17.6	12.8	11.7	4%	5%	0.8%	0.8%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	8.45	1.06	1.52	8.0	5.6	8.0	6.3	17%	20%	3.8%	5.4%	42111.9	43620.3	1779.7	2631.1	3065.1	3942.6
Marston's	45.80	9.02	10.21	5.1	4.5	6.8	6.3	19%	19%	0.0%	4.4%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	232.00	31.57	33.42	7.3	6.9	5.5	5.1	7%	8%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	566.50	59.68	42.69	9.5	13.3	7.3	10.3	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9
Mondi	753.20	0.45	0.72	19.5	12.1	7.8	6.5	3%	3%	2.9%	4.1%	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	4.59	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	2.94	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	1081.50	86.62	92.96	12.5	11.6	0.9	0.9	nm	5%	3.7%	3.9%	3865.0	4106.3	429.3	458.7	453.3	485.8
Playtech	348.20	0.22	0.29	18.0	13.7	0.7	0.6	4%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	96.00	9.81	10.33	9.8	9.3	4.9	4.5	4%	8%	3.1%	3.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	23.87	2.12	1.85	11.9	12.9	6.5	6.7	6%	6%	1.7%	2.0%	15544.3	16091.1	2459.2	2148.1	3832.6	3570.1
Smurfit Westrock	3169.00	2.17	2.83	19.6	15.0	6.9	6.3	7%	7%	4.3%	4.6%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	165.30	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	504.50	40.50	36.60	11.2	13.8	7.4	8.0	8%	8%	4.4%	3.9%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	77.20	5.27	6.09	14.6	12.7	0.7	0.7	3%	15%	7.8%	9.1%	3767.5	3993.3	287.3	325.9	293.6	333.4
Everplay Group	253.50	27.01	29.27	9.4	8.7	3.4	2.9	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	548.50	60.01	FALSE	9.1	FALSE	5.1	FALSE	8%	FALSE	5.1%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	249.80	0.04	0.06	84.0	60.0	28.9	20.4	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.73	0.26	0.28	18.2	16.9	10.3	7.5	nm	8%	0.4%	0.4%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	261.60	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	508.00	48.12	50.21	10.6	10.1	6.0	5.8	nm	3%	0.0%	2.5%	1597.7	1620.9	124.8	129.6	178.3	183.1
Whitbread	2379.00																
Wickes Group	173.20	21.94	26.33	7.9	6.6	4.7	4.1	5%	12%	6.9%	8.1%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	1043.00	-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: 04/06/2026