

Goodbody Market Commentary Metrics



06 March 2026																	
Company	Price Ic	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
		2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	8.64	0.81	0.90	10.6	9.6	1.2	1.2			5.0%	6.1%	4569.1	4708.1	2193.7	2275.6		
Air France-KLM	10.17	5.98	7.52	1.7	1.4	3.1	2.8	87%	114%	0.0%	0.0%	34552.6	36037.2	2206.4	2647.0	5404.1	6076.3
Applied Nutrition	239.00	11.41	12.82	20.9	18.6	14.3	12.4	2%	3%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	188.68	21.43	22.68	8.8	8.3	6.2	6.0	13%	13%	5.3%	5.4%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	15.34	1.58	1.83	9.7	8.4	1.1	1.0			4.5%	4.9%	4200.8	4421.8	1813.1	2015.0		
Barratt Redrow	322.30	29.14	35.88	11.1	9.0	0.6	0.5	nm	12%	5.3%	6.4%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2436.00	188.09	228.21	13.0	10.7	0.8	0.7	13%	8%	3.1%	3.8%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	4020.00	342.80	354.08	11.7	11.4	1.1	1.0	4%	11%	3.0%	1.6%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	330.20	29.89	35.36	11.0	9.3	5.8	5.2	9%	9%	4.8%	5.1%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bvies Technology	310.40	22.47	24.51	13.8	12.7	9.1	7.9	8%	8%	8.8%	9.7%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	109.20	0.11	0.11	12.0	11.6	7.4	7.7	5%	6%	5.1%	5.1%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.37	0.23	0.25	10.5	9.5	7.5	7.0	11%	8%	4.2%	4.7%	1045.0	1126.6	177.7	190.4	182.6	196.0
Coca-Cola HBC	4542.00	2.92	3.14	17.9	16.6	10.8	10.0	4%	4%	2.5%	2.7%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6
Compass Group	2306.00	1.46	1.58	21.1	19.4	11.9	11.2	4%	4%	2.4%	2.6%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranwick	5290.00	297.22	315.87	17.8	16.7	8.9	8.4	3%	3%	2.9%	2.1%	2279.5	2175.4	227.9	240.1	325.1	344.0
CBH	111.10	583.63	654.68	19.0	17.0	10.9	10.1	9%	10%	1.4%	1.5%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	4824.00	421.97	505.84	11.4	9.5	6.9	6.4	12%	12%	4.5%	4.7%	14964.1	15168.2	521.6	559.4	788.0	829.2
Devolver Digital	24.30	0.18	0.67	184.3	48.7	10.0	7.2	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1544.00	1.59	1.59	12.9	13.0	11.4	11.2	7%	6%	2.7%	3.2%	19668.2	19214.0	5720.2	5573.1	6294.6	6098.5
Dole	15.04	148.96	158.44	10.1	9.5	4.8	4.4	9%	10%	2.5%	2.6%	9311.8	9501.3	298.6	309.3	408.1	418.9
easyJet	412.00	53.51	60.02	7.7	6.9	2.1	2.2	2%	1%	3.8%	4.1%	11134.7	11814.8	540.1	649.6	1415.8	1658.9
Entain	584.80	64.59	77.21	9.1	7.6	6.9	6.6	10%	12%	3.5%	3.7%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	29.20	17.65	FALSE	1.7	FALSE	4.3	FALSE	82%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.45																
Fever-Tree Drinks	890.00	29.23	39.36	30.4	22.6	18.7	14.4	4%	5%	2.2%	2.3%	405.4	444.5	35.8	50.5	50.1	65.1
Flutter Entertainment	113.77	9.08	13.27	12.5	8.6	8.7	6.5	8%	13%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	172.80	14.50	18.85	11.9	9.2	5.9	4.6	12%	14%	41.3%	4.8%	448.9	448.9	49.9	62.1	74.3	87.3
Frontier Developments	378.50	849.11	0.00	0.4	nm	2.9	3.0	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	704.00	43.47	48.57	16.2	14.5	8.4	8.0	4%	5%	3.3%	4.3%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	17270.00	547.81	585.95	31.5	29.5	19.5	18.1	3%	3%	2.8%	3.0%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	19.71	1.47	1.60	13.4	12.3	10.0	9.1	6%	7%	2.8%	3.1%	3962.9	4096.6	400.1	431.8	525.8	558.4
Glenveagh Properties	2.15	0.21	0.22	10.2	9.8	11.6	10.7	13%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6
Grafton Group	938.20	74.77	80.43	12.5	11.7	6.1	5.6	6%	7%	26.3%	4.5%	2623.2	1874.0	168.3	183.3	321.3	341.3
Greencoast Renewables	0.73	0.05	FALSE	14.3	FALSE	20.3	FALSE	18%	FALSE	9.4%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	256.50	16.21	23.18	15.8	11.1	8.9	6.4	5%	9%	1.9%	2.7%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1676.00	124.39	132.84	13.5	12.6	5.7	5.2	3%	7%	3.7%	4.0%	2305.8	2459.0	189.7	201.4	372.0	401.3
Hammerston	343.00	22.46	26.19	15.3	13.1	0.9	0.9	11%	17%	7.4%	7.3%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	106.00	0.13	0.18	9.5	6.9	6.1	4.2	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	873.50	50.27	53.10	17.4	16.4	9.2	9.4	5%	5%	3.1%	3.3%	2495.9	2592.7	363.2	375.5	526.6	543.1
IAG	372.20	0.68	0.78	6.3	5.5	3.3	3.2	12%	10%	2.4%	2.6%	34336.2	35530.4	4925.0	5122.7	7271.1	7737.9
Ibstock	114.40	7.48	9.52	15.3	12.0	8.1	7.0	8%	10%	3.3%	4.2%	408.3	436.2	41.1	51.7	77.4	86.6
ICG	6.58	0.49	0.54	13.5	12.2	7.7	7.0	4%	12%	2.6%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.06	0.14	0.15	7.7	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	694.00	48.97	53.22	14.2	13.0	7.6	7.4	6%	6%	1.7%	1.7%	2243.1	2356.2	141.1	146.1	256.5	262.2
Jet2	1177.00	190.10	189.04	6.2	6.2	0.8	0.8	9%	13%	1.5%	1.5%	7605.5	8182.1	439.5	414.8	777.4	783.6
Kainos Group	777.50	32.66	38.15	23.1	20.4	13.8	12.0	5%	7%	3.2%	3.2%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	69.90	5.01	5.52	13.9	12.7	10.7	9.8	6%	6%	2.2%	2.4%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingfisher	343.40	22.02	23.73	15.6	14.5	6.2	5.7	5%	9%	3.6%	3.6%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	78.80	4.18	4.62	18.8	17.0	12.5	11.4	4%	5%	0.8%	0.9%	8994.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	8.12	1.24	1.54	6.6	5.3	6.8	6.0	18%	21%	4.6%	5.7%	41784.6	43685.5	2152.9	2614.6	3493.5	3976.2
Manston's	58.50	9.02	10.21	6.5	5.7	7.2	6.7	15%	15%	0.0%	3.4%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	291.00	31.57	33.42	9.2	8.7	6.2	5.8	5%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	450.80	33.24	46.11	13.6	9.8	11.3	8.2	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	855.00	0.53	0.94	18.6	10.5	7.9	6.7	3%	5%	3.0%	4.8%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	132.20	4.20	4.73	31.4	28.0	10.3	9.6	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.31	0.54	0.57	7.9	7.6	5.1	4.8	6%	11%	4.2%	4.4%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.23	0.21	0.29	15.6	11.3	0.8	0.7			2.2%	3.7%	698.1	766.6	171.7	221.2		
Persimmon	1320.00	103.14	116.00	12.8	11.4	1.1	1.0	4%	8%	3.0%	3.2%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	354.00	0.20	0.28	20.3	14.6	0.7	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	92.80	9.81	10.33	9.5	9.0	4.7	4.4	4%	4%	3.2%	3.6%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	25.93	2.08	2.18	12.5	11.9	7.1	6.5	9%	7%	1.6%	1.8%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1
Smurfit Westrock	44.93	2.39	3.21	18.8	14.0	6.9	6.2	7%	8%	4.1%	4.4%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	190.30	13.90	16.80	13.7	11.3	6.6	6.4	5%	6%	2.6%	3.1%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	361.80	41.43	45.31	8.7	8.0	7.2	6.7	6%	6%	12%	5.6%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	100.55	7.69	9.29	13.1	10.8	0.9	0.9	6%	7%	9.9%	10.4%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	294.00	28.01	29.78	10.5	9.9	4.0	3.6	7%	7%	181.2	186.9	38.9	42.3	72.2	72.2		
Travis Perkins	624.00	60.01	FALSE	10.4	FALSE	5.5	FALSE	7%	FALSE	4.5%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	148.30	0.04	0.06	49.4	35.3	16.4	11.3	5%	7%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unigipar	3.96	0.24	0.27	16.2	14.9	8.9	6.1	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	470.00	46.20	55.16	10.2	8.5	3.3	2.6	24%	24%	0.0%	0.0%	4249.6	4647.3	371.9	426.5	484.0	558.5
WH Smith	603.00	56.72	61.98	10.6	9.7	8.7	8.1	1%	6%	3.8%	4.2%	1615.2	1697.8	142.5	152.2	196.6	208.3
Whitbread	2554.00																
Wickes Group	233.50	21.84	26.24	10.7	8.9	5.2	4.5	7%	9%	5.1%	5.1%	1710.3	1779.7	81.7	93.0	206.0	222.8
Wizz Air	977.50	-0.54	-1.95	10.7													