

Goodbody Market Commentary Metrics



06 May 2026																			
Company	Price	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	9.80	0.84	0.92	11.6	10.7	1.4	1.4	5.5%	6.0%	4566.0	4699.2	2215.3	2291.2						
Air France-KLM	9.00	3.90	8.34	2.3	1.1	3.5	2.7	78%	128%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2		
Applied Nutrition	216.00	11.41	12.82	18.9	16.9	12.8	11.1	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0		
BAM European Value Retn	172.20	21.43	22.68	8.0	7.6	5.8	5.6	14%	14%	5.8%	5.9%	5771.2	5996.4	357.3	368.3	454.0	466.9		
Bank of Ireland	16.74	1.47	1.78	11.4	9.4	1.2	1.1	4.8%	5.7%	4238.5	4481.1	1837.5	2016.4						
Barratt Redrow	252.50	29.14	35.88	8.7	7.0	0.4	0.4	nm	15%	6.7%	8.1%	5805.3	6417.2	609.3	726.2	613.7	727.7		
Beauty Tech Group	309.00	21.04	24.57	14.7	12.6	6.9	5.4	8%	10%	160.8	180.9	0.0%	0.0%	28.2	32.8	40.5	46.0		
Bellway	1925.00	183.78	213.85	10.5	9.0	0.6	0.6	4%	14%	3.9%	4.8%	3049.1	3233.9	325.0	364.3	328.1	367.3		
Berkeley Group	3260.00	342.80	354.08	9.5	9.2	0.9	0.8	5%	13%	3.7%	2.0%	2270.4	2331.6	452.2	459.2	441.0	447.0		
Breedon Group	306.60	30.07	34.93	10.2	8.8	5.6	5.1	9%	8%	5.1%	5.4%	1786.3	1862.1	142.0	158.9	281.4	302.7		
Bvies Technology	303.00	22.47	24.51	13.5	12.4	8.8	7.6	8%	8%	9.0%	9.5%	224.8	243.9	63.7	71.2	65.5	73.2		
C & C Group	119.00	0.11	0.11	13.1	12.7	7.9	8.1	4%	6%	4.6%	4.6%	1586.8	1525.6	71.8	71.8	107.4	107.4		
Cairn Homes	2.18	0.23	0.25	9.6	8.6	6.6	6.3	5%	9%	1065.6	1204.2	181.7	200.5	183.8	203.1				
Coca-Cola HBC	4313.00	2.92	3.14	17.1	15.9	10.3	9.6	4%	4%	2.6%	2.8%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5		
Compass Group	28.25	1.46	1.58	19.4	17.8	11.1	10.0	4%	5%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5				
Cranwick	5370.00	297.22	315.87	18.1	17.0	9.0	8.5	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0		
CRH	112.50	586.63	664.39	19.2	16.9	11.0	10.1	9%	10%	1.4%	1.4%	39691.5	41441.0	5944.7	6452.7	8233.2	8829.5		
DCC	5805.00	421.97	505.84	13.8	11.5	8.1	7.5	10%	10%	3.7%	3.9%	14964.1	15168.2	521.6	559.4	788.0	829.2		
Devolver Digital	21.50	0.18	0.67	166.0	43.8	8.4	6.1	7%	9%	109.6	118.6	1.1	4.2	5.7	8.8				
Diageo	1480.80	1.59	1.61	12.6	12.4	11.1	10.6	7%	7%	2.7%	3.2%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2		
Dole	14.80	135.26	144.02	10.9	10.3	4.8	4.4	11%	12%	9488.2	9634.5	284.2	293.4	407.7	419.3				
easyJet	357.00	18.11	33.65	19.7	10.6	2.4	2.6	nm	nm	4.3%	4.8%	10928.0	11793.0	138.2	365.0	1105.1	1393.5		
Entain	567.80	60.21	71.83	9.4	7.9	6.6	6.1	10%	12%	3.6%	3.8%	5574.3	5794.4	869.4	980.2	1162.3	1237.4		
Evoke	36.90	17.65	FALSE	2.1	FALSE	4.4	FALSE	65%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE		
FBD Holdings	16.05	1.47	1.57	10.9	10.2	1.2	1.2												
Fever-Tree Drinks	819.50	29.14	39.37	28.1	20.8	17.0	13.0	4%	6%	2.3%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7		
Flutter Entertainment	106.70	6.44	9.79	16.6	10.9	10.0	7.5	4%	8%	0.0%	0.0%	18493.9	20523.2	2179.9	2959.7	2919.7	3780.6		
Forterra	157.00	13.41	15.15	11.7	10.4	6.4	5.6	14%	12%	5.3%	6.0%	403.4	434.0	43.6	47.6	63.8	69.3		
Frontier Developments	311.50	849.11	0.00	0.4	nm	2.4	2.4	6%	9%	96.6	0.0%	96.6	96.6	9.1	6.9	43.0	40.3		
Fuller, Smith & Turner	648.00	43.47	48.57	14.9	13.3	8.0	7.6	4%	5%	3.6%	3.9%	396.2	413.5	43.2	47.6	73.3	76.9		
Games Workshop Group	20070.00	547.81	585.95	36.6	34.3	22.7	21.1	3%	3%	2.4%	2.6%	625.0	671.8	238.5	254.4	283.9	305.1		
Glanbia	23.15	1.47	1.60	15.7	14.5	11.6	10.6	5%	6%	2.4%	2.6%	3952.9	4096.6	400.1	431.8	525.8	558.4		
Glenveagh Properties	2.11	0.21	0.22	10.1	9.4	11.3	10.0	15%	10%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9		
Grafton Group	887.80	74.77	80.43	11.9	11.0	5.8	5.3	7%	11%	4.5%	4.7%	2623.2	2724.0	168.3	183.3	321.3	341.3		
Greencoast 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	247.00	18.17	22.96	13.6	10.8	8.6	6.1	6%	10%	1.2%	1.9%	3498.9	4334.8	225.8	317.8	331.2	447.1		
Greggs	1516.50	122.02	122.78	12.4	12.4	5.3	5.0	5%	7%	4.5%	4.5%	2279.9	2406.4	189.7	191.2	372.4	390.2		
Hammerson	330.00	22.65	24.70	14.6	13.4	0.8	0.8	8%	10%	5.4%	5.7%	215.9	232.2	177.7	192.3	177.7	192.2		
Hostelworld Group	107.00	0.13	0.18	9.7	7.0	6.2	4.3	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9		
Howden Joinery	773.00	51.39	57.32	15.0	13.5	8.5	7.9	6%	6%	3.0%	3.1%	2501.6	2598.9	372.0	405.0	535.2	571.6		
JAG	371.90	0.64	0.74	6.8	5.8	3.5	3.3	12%	10%	2.4%	2.6%	35101.0	36582.9	4648.7	4925.7	6994.8	7540.9		
Ibstock	103.70	6.26	7.53	16.6	13.8	7.9	7.2	5%	8%	3.1%	3.6%	399.2	429.6	36.3	42.9	71.8	77.3		
ICG	6.50	0.49	0.54	13.3	12.1	7.7	6.9	4%	12%	2.5%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1		
IRIS REIT	1.07	0.17	0.15	8.4	7.2	0.8	0.7	2%	2%	5.4%	5.4%	67.6	70.0	80.2	101.6	87.6	99.1		
J.D. Wetherspoon	584.50	46.07	51.49	12.7	11.4	7.3	7.0	6%	7%	2.1%	2.1%	2222.8	2319.4	132.0	139.1	247.3	255.0		
Jet2	1127.00	190.52	113.44	5.9	9.9	0.3	1.2	27%	nm	1.6%	1.6%	7618.1	8026.6	437.5	226.8	777.1	618.5		
Kaines Group	830.00	33.13	43.31	25.1	19.2	15.8	11.7	7%	8%	3.0%	3.0%	430.3	499.9	45.9	61.9	53.8	70.8		
Kerry Group	72.20	5.01	5.51	14.4	13.1	11.0	10.0	6%	6%	2.1%	2.3%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4		
Kingsfisher	289.00	23.42	25.12	12.1	11.5	5.3	5.2	10%	10%	4.4%	4.3%	12945.0	13234.4	651.0	685.9	1327.0	1326.8		
Kingspan	78.65	4.18	4.62	18.8	17.0	12.5	11.4	4%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6		
Lufthansa	7.49	1.08	1.33	7.0	5.6	8.0	6.6	18%	24%	4.3%	5.3%	41488.5	43955.2	1801.9	2341.3	2985.7	3607.3		
Marston's	50.30	9.02	10.21	5.6	4.9	7.0	6.5	17%	17%	0.0%	0.0%	908.6	930.0	166.0	174.5	211.6	220.0		
Mitchells & Butlers	251.50	31.57	33.42	8.0	7.5	5.7	5.3	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1		
Molten Ventures	563.50	33.24	46.11	17.0	12.2	13.9	10.1	1%	3%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8		
Mondi	775.20	0.45	0.72	20.1	12.4	7.9	6.6	2%	3%	2.8%	4.0%	8180.1	8523.7	399.5	578.5	917.9	1092.9		
NCC Group	128.60	4.20	4.73	30.6	27.2	10.0	9.4	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3		
Orion Enterprises	4.66	0.54	0.57	8.6	8.2	5.4	5.2	5%	10%	3.9%	4.1%	2129.2	2173.2	86.3	89.1	120.8	125.4		
Permanent TSB	2.91	0.23	0.27	12.9	10.7	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9				
Persimmon	1057.00	102.91	113.64	10.3	9.3	0.9	0.9	nm	8%	3.8%	4.0%	4017.7	4280.1	502.4	550.8	526.6	578.2		
Playtech	366.40	0.22	0.29	19.0	14.4	0.7	0.7	3%	3%	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	22.42	2.06	2.16	10.9	10.4	6.0	5.6	10%	8%	1.9%	2.0%	15481.8	16340.1	2416.6	2463.7	3754.1	3849.4		
Smurfit Westrock	2885.00	2.17	2.83	18.0	13.8	6.6	6.0	7%	8%	4.7%	5.0%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8		
SSP Group	155.20	13.90	16.80	11.2	9.2	6.2	5.9	7%	7%	3.2%	3.8%	3815.7	4005.7	304.0	331.4	650.8	681.4		
Tate & Lyle	368.90	40.87	43.21	9.0	8.5	6.1	5.8	6%	12%	5.5%	5.7%	2014.2	2013.8	287.5	292.1	417.9	422.2		
Taylor Wimpey	79.44	7.69	9.29	10.3	8.6	0.7	0.7	8%	9%	12.6%	13.2%	3941.4	4240.8	413.6	494.0	420.5	502.0		
Everplay Group	266.00	27.01	29.27	9.8	9.1	3.7	3.2	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3		
Travis Perkins	527.50	60.01	FALSE	8.8	FALSE	4.9	FALSE	9%	FALSE	5.3%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE		
Trustpilot Group	260.20	0.04	0.06	88.2	63.0	30.4	21.5	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9		
Uniphir	4.16	0.26	0.28	16.0	14.9	9.3	6.6	nm	10%	0.5%	0.5%	3210.0	3357.8	107.1	115.0	147.7	165.8		
Vistry Group	331.00	22.97	31.92	14.4	10.4	2.4	2.1	33%	10%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1		
WH Smith	516.00	53.43	60.06	9.7	8.6	5.8	5.3	0%	7%	4.2%	4.7%	1607.2	1683.6	136.1	148.7	189.9	204.2		
Whitbread	2296.00																		
Wickes Group	197.00	21.94	26.33	9.0	7														