

Goodbody Market Commentary Metrics



November 2025																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	1c	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
AlB Group	8.31	0.89	0.79	10.4	10.8	1.2	1.2			4.8%	4.9%	4428.2	4479.6	2087.0	2104.3		
Air France-KLM	10.01	6.15	5.26	1.6	1.9	3.4	3.1	61%	93%	0.0%	0.0%	33123.4	34426.2	1901.7	2009.3	4698.6	4901.8
Applied Nutrition	178.00	9.12	10.12	19.5	17.6	13.8	12.0	3%	4%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3
B&M European Value Ret	164.90	34.42	24.89	11.9	6.6	8.2	5.1	7%	17%	3.7%	7.6%	5571.0	5812.2	527.0	402.9	619.0	500.2
Bank of Ireland	14.93	1.44	1.57	10.4	9.5	1.1	1.1			4.3%	4.6%	4120.3	4817.7	1708.5	1794.1		
Bakkavor Group	221.00																
Barclay Redrow	376.70	35.48	29.14	10.6	12.9	0.7	0.7	nm		4.2%	4.5%	5582.9	5859.2	552.6	600.5	667.9	609.1
Bellway	2644.00	172.75	192.69	15.3	13.4	0.8	0.8	4%	8%	2.6%	3.0%	2780.5	2999.9	299.1	327.6	205.2	327.2
Berkley Group	3952.00	370.16	317.54	11.9	12.4	1.3	1.3	4%	6%	1.6%	3.1%	2486.5	2374.4	514.7	444.0	503.8	435.0
Bredon Group	332.80	30.23	32.81	11.0	10.1	6.1	5.5	4%	9%	4.6%	4.8%	1734.1	1822.8	159.0	173.8	279.9	292.0
Budes Technology	360.40	22.88	22.50	21.3	15.3	15.8	10.6	4%	7%	7.3%	8.0%	217.1	228.1	66.4	67.0	67.9	66.0
C & C Group	136.20	0.12	0.12	15.9	13.0	8.9	6.0	3%	5%	3.3%	4.2%	1665.6	1652.6	77.2	79.7	112.0	111.1
Clair Homes	1.93	0.20	0.23	9.5	8.6	6.0	6.2	0%	18%	4.7%	5.2%	946.3	1045.0	162.6	177.7	167.1	182.6
Coca-Cola HBC	3514.00	9.24	2.86	14.9	13.9	9.4	8.7	4%	5%	2.9%	3.2%	11535.2	12191.1	1341.2	1447.1	1749.8	1872.2
Compass Group	2493.00	1.31	1.43	25.0	22.8	14.6	13.7	3%	3%	2.0%	2.2%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
Cranwick	4925.00	273.41	292.01	17.3	16.9	9.2	8.5	3%	3%	2.1%	2.2%	2723.3	2942.6	190.8	220.0	293.2	315.2
CBH	114.78	544.93	605.90	21.1	18.9	12.1	11.4	3%	8%	1.3%	1.3%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5
Dalet Hotel Group	6.44																
DCC	4770.00	403.60	433.35	13.4	11.0	8.1	6.8	8%	12%	3.8%	4.5%	18011.1	14959.5	439.6	521.4	784.0	787.9
Devolver Digital	26.00	0.14	0.70	237.7	48.6	11.0	7.4	8%	7%	0.0%	0.0%	109.6	118.9	0.6	4.4	5.2	9.0
Diageo	1680.00	1.66	1.70	18.0	13.0	12.1	10.7	6%	7%	3.5%	4.7%	20245.0	20474.4	5897.0	6066.3	7422.0	6673.0
Dole	13.05	129.66	148.86	10.1	8.8	4.7	4.3	4%	10%	2.6%	2.9%	8904.6	9085.1	283.6	408.4	393.1	408.0
easyJet	478.50	69.60	78.55	6.9	6.1	2.2	2.0	18%	10%	3.0%	3.2%	10165.0	10841.7	671.9	922.1	1452.4	1688.7
Entain	741.40	57.75	73.60	12.8	10.1	7.7	7.2	4%	8%	2.7%	2.8%	5351.6	5594.6	808.2	829.0	1139.2	1212.2
Evolve	36.35	11.35	17.65	3.2	2.1	5.2	4.4	46%	66%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	14.30	1.66	FALSE	8.6	FALSE	1.2	FALSE			8.0%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	817.00	24.53	28.99	33.3	28.2	19.3	17.0	4%	4%	2.2%	2.3%	372.8	411.5	29.5	35.2	43.5	50.2
Flutter Entertainment	214.23	8.04	12.13	26.6	17.7	14.7	11.1	4%	6%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	180.00	13.07	14.50	13.8	12.4	7.2	6.1	7%	12%	3.2%	3.8%	380.9	413.7	41.4	49.1	62.4	74.3
Frontier Developments	563.00	587.49	849.11	1.0	0.7	5.7	5.2	3%	2%	0.0%	0.0%	90.6	96.6	5.7	9.1	36.0	38.4
Fuller, Smith & Turner	616.00	34.22	40.26	19.2	15.3	8.6	8.0	nm	5%	3.0%	3.5%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop Group	15560.00	525.16	561.13	29.6	27.7	18.5	17.2	3%	4%	3.0%	3.2%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	17.64	1.33	1.45	13.3	12.2	10.5	9.4	6%	8%	2.6%	2.8%	3871.8	3820.0	353.2	383.8	502.6	532.7
Glenveagh Properties	1.88	0.20	0.21	9.6	8.9	11.1	9.7	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9
Grafton Group	942.00	70.31	75.86	13.4	12.4	6.6	6.1	4%	6%	4.0%	4.2%	2525.1	2640.5	157.0	171.0	306.0	324.0
Greencoat Renewables	0.69	0.14	0.14	4.8	4.8	13.4	14.7	20%	21%	10.3%	10.8%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	232.00																
Grecoqs	1576.00	129.34	132.76	12.2	11.9	5.8	5.4	nm	4%	4.1%	4.2%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerston	311.20																
Hostelworld Group	127.00	0.11	0.15	12.9	9.9	8.2	6.1	9%	11%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	820.00	46.32	50.52	7.7	16.2	9.7	9.2	4%	5%	2.9%	3.4%	2418.6	2512.5	340.3	365.0	498.8	528.4
IAG	414.10	0.66	0.75	1.1	3.0	2.6	15%	18%	0.7%	2.6%	3.2%	33522.1	34437.3	4950.0	5227.8	7569.5	8103.3
Ibstock	131.00	6.24	11.12	21.0	11.8	9.9	6.9	0%	10%	12.2%	4.3%	382.4	426.6	38.1	61.0	72.5	99.0
ICG	5.80	0.40	0.44	14.5	13.2	7.6	7.0	11%	4%	2.8%	3.0%	633.6	664.4	74.1	79.3	143.1	148.3
IFRES REIT	0.93	0.06	0.13	15.6	7.0	0.7	0.0	2%	3%	5.0%	5.4%	65.7	67.6	54.7	92.0	52.0	89.4
J D Wetherspoon	627.50	48.06	53.97	13.9	11.6	7.2	7.3	8%	6%	1.9%	1.9%	2127.5	2223.5	146.4	151.2	259.7	264.7
Jet2	1312.00	217.83	194.54	6.6	6.7	1.5	1.1	23%	14%	1.1%	1.5%	7173.5	7565.2	446.5	450.6	728.6	782.8
Kainos Group	931.00	30.80	33.66	29.6	27.7	19.9	17.0	5%	4%	2.7%	2.6%	367.2	395.6	41.8	51.9	49.6	59.8
Kerry Group	79.20	4.88	5.41	16.2	14.6	12.2	11.1	4%	5%	1.8%	1.9%	6907.3	7110.7	933.8	1017.4	1236.4	1321.9
Kingsfisher	310.50	20.41	19.97	12.9	15.5	5.5	5.9	10%	8%	4.7%	4.0%	12784.0	12842.4	628.0	608.8	1299.0	1272.8
Kingspan	64.25	3.83	4.15	16.8	15.5	11.4	10.6	5%	5%	0.9%	1.0%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	7.47	1.10	1.24	6.8	6.0	7.1	6.4	17%	20%	4.4%	5.0%	39509.3	41656.1	1939.3	2156.2	3204.5	3554.4
Marston's	44.50	7.80	8.74	5.7	5.1	7.4	6.9	14%	15%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	241.50	28.97	30.05	8.3	8.0	6.1	5.8	8%	6%	0.0%	0.0%	2712.1	2822.2	325.8	330.1	458.5	466.9
Molten Ventures	449.80	-0.43	33.24	nm	13.5	63.1	11.3	8%	1%	0.0%	0.0%	43.6	111.2	10.0	77.7	10.3	77.8
Mondi	821.00	0.70	0.90	13.3	10.4	7.1	6.5	nm	4%	5.0%	6.6%	7553.0	8072.4	550.6	658.6	1047.5	1134.8
NCC Group	144.40	5.53	7.09	26.1	20.4	9.6	8.5	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.63	0.52	0.54	7.0	6.8	6.0	5.7	nm	7%	4.7%	5.0%	2177.5	2256.2	79.6	83.8	111.3	117.1
Permanent TSB	3.21	0.07	0.21	45.1	15.0	0.8	0.7			0.6%	2.2%	650.5	694.0	125.5	172.6		
Persimmon	1203.50	93.59	104.31	12.9	11.5	1.0	1.0	nm	5%	3.3%	3.3%	3523.6	3758.4	444.9	489.6	467.4	514.9
Playtech	233.00	0.14	0.20	19.1	13.2	0.4	0.4	2%	4%	0.0%	0.0%	797.8	831.6	73.9	89.4	175.2	193.7
Rank Group	113.40	8.88	10.62	9.9	10.7	4.7	5.2	7%	4%	2.2%	2.8%	795.4	852.6	63.7	72.4	116.5	128.2
Ryanair	26.67	1.45	2.07	12.5	12.9	6.7	7.2	10%	10%	2.1%	1.5%	13948.5	15392.3	1558.0	2415.2	2772.4	3732.4
Soufflt Westrock	35.53	2.72	2.88	13.1	12.4	6.4	5.9	4%	7%	5.1%	4.5%	31050.4	31816.5	2281.3	2602.6	4982.7	5281.6
SSP Group	147.90	11.51	13.48	12.8	11.0	7.0	6.3	3%	4%	2.7%	3.2%	3644.8	3812.8	260.4	287.3	553.2	633.3
Tate & Lyle	380.80	50.26	38.68	13.1	9.8	10.1	7.4	7%	8%	3.0%	5.3%	1736.4	2039.7	287.6	282.6	380.6	420.7
Taylor Wimpey	103.50	8.00	9.30	12.9	9.1	6.9	5.9	3%	10%	9.0%	9.7%	3767.6	4015.1	428.1	490.5	435.6	497.2
Everplay Group	377.00	26.38	28.01	14.3	13.5	0.2	0.5	5%	5%	0.0%	0.0%	175.9	181.2	35.8	38.9	69.7	72.2
Travis Perkins	615.00	49.14	60.01	12.5	10.2	6.0	5.4	7%	7%	3.7%	4.6%	4697.5	4874.0	161.4	196.2	354.3	391.5
Trustpilot Group	190.60	0.03	0.05	82.3	55.0	31.5	23.9	4%	4%	0.0%	0.0%	249.2	285.1	17.6	37.7	29.6	37.7
Uniphar	3.84	0.22	0.24	17.4	16.2	9.5	8.7	7%	7%	0.5%	0.5%	2890.7	2981.4	97.1	107.0	133.0	143.3
Vistry Group	633.80	38.61	49.00	16.4	12.9	6.1	5.1	8%	9%	0.0%	0.0%	4293.3	4536.5	404.2	442.6	400.5	455.4
WH Smith	64.00	61.56	65.61	10.4	9.8	9.6	9.4	5%	6%	5.3%	4.4%	1530.1	1618.5	139.7	148.4	200.9	200.2
Whitbread	2843.00																
Wickes Group	215.00	17.68	22.15	12.2	9.7	5.6	4.9	5%	8%	5.1%	5.6%	1606.9	1685.2	72.5	82.5	191.4	205.8
Wizz Air	998.50	1.67	0.03	11.8	327.6	9.6	7.9	25%	36%	0.0%	0.0%	5267.6	6050.6	167.5	191.0	113.4	

Closing prices as of: 06/11/2025