

Goodbody Market Commentary Metrics



08 April 2026																	
Company	Price 1c	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	8.96	0.84	0.92	10.6	9.8	1.3	1.3			6.0%	6.6%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	8.88	3.93	5.19	2.3	1.7	3.5	3.3	80%	104%	0.0%	0.0%	34741.0	36232.6	1580.8	1934.8	4779.8	5366.7
Applied Nutrition	218.00	11.41	12.82	19.1	17.0	13.0	11.2	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
BAM European Value Retn	178.50	21.43	22.68	8.3	7.9	5.9	5.7	14%	13%	5.6%	5.7%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	15.52	1.47	1.78	10.6	8.7	1.1	1.1			5.2%	6.1%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	251.10	29.14	35.88	8.6	7.0	0.4	0.4	nm	15%	6.8%	8.2%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	1863.00	188.09	228.21	9.9	8.2	0.6	0.6	17%	11%	4.0%	5.0%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	3210.00	342.80	354.08	9.4	9.1	0.8	0.8	5%	13%	3.8%	2.0%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	296.80	29.89	35.36	9.9	8.4	5.4	4.8	10%	10%	5.4%	5.7%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bvies Technology	286.60	22.47	24.51	12.8	11.7	8.2	7.1	9%	8%	9.6%	10.5%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	115.60	0.11	0.11	12.6	12.2	7.7	7.9	5%	5%	4.8%	4.8%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.11	0.23	0.25	9.3	8.3	6.4	6.0	5%	10%	5.5%	5.9%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4218.00	2.92	3.14	16.5	15.4	10.0	9.3	4%	4%	2.7%	2.9%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	28.36	1.46	1.58	0.3	0.2	1.8	1.6	328%	349%	194.0%	211.1%	50575.5	53950.6	3629.9	3966.0	5070.3	5362.5
Cranwick	5210.00	297.22	315.87	17.5	16.5	8.8	8.3	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0
CBH	105.87	583.63	654.68	18.1	16.2	10.5	9.7	10%	10%	1.5%	1.5%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	4764.00	421.97	505.84	11.3	9.4	6.8	6.3	12%	12%	4.5%	4.8%	14964.1	15168.2	521.6	528.2	788.0	829.2
Devolver Digital	22.00	0.18	0.67	166.0	43.8	8.4	6.1	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1390.20	1.59	1.59	11.6	11.6	10.7	10.4	8%	7%	3.0%	3.5%	19668.2	19214.0	5720.2	5573.1	6294.6	6098.5
Dole	15.05	135.26	144.02	11.1	10.5	4.9	4.5	11%	12%	2.2%	2.4%	9488.2	9634.5	284.2	293.4	407.7	419.3
easyJet	357.20	53.51	60.02	6.0	6.0	3.9	4.0	3%	1%	4.3%	4.8%	11134.7	11814.8	540.1	649.6	1415.8	1658.9
Entain	565.80	64.59	77.21	8.8	7.3	6.8	6.5	10%	12%	3.7%	3.8%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	29.90	17.65	FALSE	1.7	FALSE	4.3	FALSE	80%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.50																
Fever-Tree Drinks	758.00	29.14	39.37	26.0	19.3	15.6	11.9	4%	7%	2.5%	2.6%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	103.80	9.08	13.27	11.4	7.8	8.2	6.1	9%	14%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	155.00	13.41	15.15	11.6	6.3	5.6	14%	13%	4.5%	6.1%	43.0%	40.4	43.6	47.6	63.8	69.3	
Frontier Developments	346.00	849.11	0.00	0.4	nm	2.7	2.7	6%	8%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	662.00	43.47	48.57	15.2	13.6	8.1	7.7	4%	5%	3.5%	4.1%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	18000.00	547.81	585.95	32.9	30.7	20.3	18.9	3%	3%	2.7%	2.9%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	19.80	1.47	1.60	13.4	12.4	10.1	9.1	6%	7%	2.8%	3.1%	3962.9	4096.6	400.1	431.8	525.8	558.4
Glenveagh Properties	1.95	0.21	0.22	9.3	8.7	10.5	9.2	16%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	870.30	74.77	80.43	11.6	10.8	5.7	5.2	7%	7%	4.6%	4.8%	2623.2	283.3	183.3	321.3	341.3	
Greencoast Renewables	0.75	0.05	FALSE	14.6	FALSE	20.5	FALSE	18%	FALSE	9.2%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	239.00	16.21	23.18	14.7	10.3	8.5	6.1	5%	10%	2.0%	2.9%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1546.50	122.02	122.78	12.7	12.6	5.3	5.1	5%	7%	4.5%	4.5%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerston	297.80	22.65	24.70	13.1	12.1	0.7	0.7	9%	11%	5.9%	6.3%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	100.00	0.13	0.18	8.9	6.5	5.7	3.9	13%	21%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	791.00	51.39	57.32	15.4	13.8	8.6	8.1	6%	6%	2.9%	3.0%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	360.20	0.68	0.78	6.1	5.3	3.2	3.1	12%	11%	2.5%	2.7%	34336.2	35550.4	4925.0	5122.7	7271.1	7737.9
Ibstock	101.10	6.26	7.53	16.2	13.4	7.8	7.0	5%	8%	3.1%	3.7%	399.2	429.9	36.3	42.9	71.8	77.3
ICG	6.20	0.49	0.54	12.7	11.5	7.4	6.6	4%	13%	2.8%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.01	0.13	0.15	7.8	6.8	0.7	0.7	2%	3%	5.7%	5.7%	67.6	90.2	101.6	87.6	99.1	
J.D. Wetherspoon	586.50	46.07	51.49	12.7	11.4	7.3	7.0	6%	7%	2.0%	2.0%	2222.8	2319.4	132.0	139.1	247.2	255.0
Jet2	1122.00	190.10	189.04	6.9	5.9	0.7	0.6	10%	14%	1.6%	1.6%	7605.5	8182.1	429.5	414.8	777.4	783.6
Kainos Group	766.00	32.66	38.15	22.8	20.1	13.6	11.0	5%	7%	3.2%	3.2%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	67.70	5.01	5.52	13.5	12.3	10.5	9.5	6%	6%	2.3%	2.5%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingfisher	283.40	22.02	23.73	12.9	11.9	5.4	5.0	7%	11%	4.4%	4.4%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	71.65	4.18	4.62	17.1	15.5	11.5	10.5	5%	5%	0.9%	0.9%	8994.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	7.38	1.14	1.46	6.4	5.0	7.7	6.3	19%	24%	4.7%	6.0%	41422.2	43345.4	1903.2	2543.7	3086.8	3746.1
Manston's	53.60	9.02	10.21	5.9	5.3	7.1	6.6	16%	16%	0.0%	3.7%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	255.50	31.57	33.42	8.1	7.6	5.7	5.4	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	470.00	33.24	46.11	14.1	10.2	11.7	8.5	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	840.80	0.53	0.94	18.2	10.2	7.8	6.1	3%	5%	3.0%	4.9%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	119.00	4.20	4.73	28.3	25.2	9.3	8.7	4%	6%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.55	0.54	0.57	8.4	8.0	5.3	5.1	5%	10%	4.0%	4.2%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.00	0.21	0.29	14.5	10.5	0.7	0.7			2.3%	4.0%	698.1	766.6	171.7	221.2		
Persimmon	1082.00	103.14	116.00	10.5	9.3	0.9	0.9	5%	9%	3.7%	3.9%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	377.60	0.22	0.29	19.4	14.7	0.7	0.7	3%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	89.80	9.81	10.33	9.2	8.7	4.6	4.3	5%	8%	3.3%	3.7%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	24.23	2.08	2.18	11.7	11.1	6.6	6.1	9%	7%	1.7%	1.9%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1
Smurfit Westrock	38.83	2.39	3.21	16.2	12.1	6.3	5.7	8%	9%	4.7%	5.0%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	180.90	13.90	16.80	13.0	10.8	6.5	6.2	6%	6%	2.7%	3.3%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	348.20	41.43	45.31	8.4	7.7	7.0	6.6	6%	12%	5.8%	6.1%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	82.94	7.69	9.29	10.8	8.9	0.7	0.7	7%	9%	12.1%	12.7%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	235.00	27.01	29.27	8.7	8.0	3.1	2.6	8%	9%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	555.50	60.01	FALSE	9.3	FALSE	5.1	FALSE	8%	FALSE	5.0%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	209.40	0.04	0.06	69.3	49.5	23.6	16.5	3%	5%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unigipar	3.90	0.24	0.27	15.9	14.7	8.8	6.0	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	328.20	22.97	31.92	14.3	10.3	2.4	2.1	33%	10%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1
WH Smith	578.00	53.43	60.06	10.8	9.6	6.2	5.7	0%	6%	3.8%	4.2%	1607.2	1683.6	136.1	148.7	189.9	204.2
Whitbread	2390.00																
Wickes Group	209.50	21.84	26.24	9.6	8.0	4.9	4.3	7%	11%	5.7%	5.7%	1710.3	1779.7	81.7	93.0	206.0	222.8
Wizz Air	858.50	-0.54	-1.95	nm	nm	9.0	9.0										