Goodbody Market Commentary Metrics

Goodbody

08 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	10.12	0.84	0.92	12.0	11.0	1.5	1.4			5.3%	5.8%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	11.33	3.90	8.34	2.9	1.4	3.7	2.8	62%	102%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2
Applied Nutrition	279.00	11.97	13.20	23.3	21.1	16.4	14.1	1%	3%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2
B&M European Value Reta	207.40	21.15	21.88	9.8	9.5	6.6	6.4	12%	11%	4.8%	5.0%	5771.2	5984.5	353.4	361.6	450.1	460.1
Bank of Ireland	17.39	1.47	1.78	11.8	9.8	1.2	1.2			4.6%	5.5%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	259.60	29.33	24.65	8.8	10.5	0.4	0.4	nm	13%	6.4%	7.9%	5777.8	6093.5	593.6	508.7	598.0	510.8
Beauty Tech Group	355.00	21.04	24.57	16.9	14.4	8.2	6.6	7%	9%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	1816.00	175.84	156.88	10.3	11.6	0.6	0.6	4%	13%	4.1%	5.1%	3036.0	3149.5	312.0	272.6	315.0	275.6
Berkeley Group	3490.00	334.63	290.34	10.4	12.0	0.9	0.9	3%	7%	3.5%	1.8%	2258.6	2014.5	441.3	375.1	425.6	358.4
Breedon Group	275.60	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	375.00	22.47	24.51	16.7	15.3	11.4	9.9	7%	6%	7.3%	8.0%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	94.50	0.11	0.11	10.4	9.9	6.9	7.1	6%	7%	5.8%	5.8%	1586.8	1545.6	71.8	72.5	107.4	108.1
Cairn Homes	2.36	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	4294.00	2.92	3.14	17.0	15.8	10.3	9.5	4%	4%	2.6%	2.8%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	32.81	1.48	1.63	22.2	20.2	12.2	11.3	4%	4%	2.3%	2.5%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5490.00	297.22	315.87	18.5	17.4	9.2	8.7	3%	2%	1.9%	2.0%	2994.5	3175.4	227.9	240.1	325.1	344.0
CRH	105.06	585.55	660.57	17.9	15.9	10.3	9.5	9%	10%	1.5%	1.5%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4
DCC	6015.00	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	163.9	43.3	8.2	5.9	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1495.00	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	14.01	135.26	144.02	10.4	9.7	4.7	4.3	12%	13%	2.4%	2.6%	9488.2	9634.5	284.2	293.4	407.7	419.3
easyJet	471.70	10.49	28.37	44.9	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	555.40	60.21	71.83	9.2	7.7	6.5	6.0	11%	12%	3.7%	3.9%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	46.00	17.65	FALSE	2.6	FALSE	4.5	FALSE	52%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.95	1.47	1.57	11.5	10.8	1.3	1.3										
Fever-Tree Drinks	751.00	29.14	39.37	25.8	19.1	15.4	11.8	4%	7%	2.5%	2.6%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	100.72	5.91	9.45	17.1	10.7	9.9	7.2	4%	8%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5
Forterra	136.80	11.51	13.18	11.9	10.4	6.4	5.6	14%	13%	5.2%	6.0%	390.7	420.3	38.1	42.0	57.6	63.0
Frontier Developments	457.50	849.11	0.00	0.5	nm	3.6	3.7	4%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	646.00	43.47	48.57	14.9	13.3	7.9	7.6	4%	5%	3.6%	3.9%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	18980.00	547.81	585.95	34.6	32.4	21.4	19.9	3%	3%	2.6%	2.8%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	24.69	1.50	1.63	16.4	15.2	12.0	11.0	5%	6%	1.9%	2.1%	4107.8	4242.3	409.9	441.6	535.1	567.7
Glenveagh Properties	2.33	0.21	0.23	11.0	10.2	12.6	11.2	13%	9%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	826.70	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	0.76	0.05	FALSE	14.9	FALSE	20.7	FALSE	17%	FALSE	9.0%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	192.00	18.17	22.96	10.6	8.4	7.3	5.1	8%	12%	1.5%	2.4%	3498.9	4334.8	225.8	317.8	331.2	447.1
Greggs	1692.00	122.02	122.78	13.9	13.8	5.7	5.4	4%	6%	4.1%	4.1%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	330.60	22.65	24.70	14.6	13.4	0.8	0.8	8%	9%	5.3%	5.7%	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	420.80	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	95.20	6.26	7.53	15.2	12.6	7.4	6.7	6%	9%	3.3%	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	1.11	0.13	0.15	8.7	7.5	0.8	0.7	2%	2%	5.2%	5.1%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	627.50	46.03	51.49	13.6	12.2	7.5	7.2	6%	6%	1.9%	1.9%	2222.8	2319.4	132.0	139.1	247.3	255.0
Jet2	1267.00	190.52	113.44	6.7	11.2	0.6	1.7	24%	nm	1.4%	1.4%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	849.50	33.13	43.31	25.6	19.6	16.2	12.1	7%	8%	2.9%	2.9%	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	284.10	23.42	25.12	12.1	11.3	5.3	5.2	10%	10%	4.4%	4.4%	12945.0	13234.4	651.0	685.9	1327.0	1326.8
Kingspan	81.90	4.18	4.62	19.6	17.7	12.9	11.8	4%	5%	0.8%	0.8%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	8.44	1.06	1.52	7.9	5.5	8.0	6.3	17%	20%	3.8%	5.4%	42111.9	43620.3	1779.7	2631.1	3065.1	3942.6
Marston's	45.85	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	236.00	31.57	33.42	7.5	7.1	5.5	5.1	7%	8%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	558.00	59.68	42.69	9.4	13.1	7.2	10.2	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9
Mondi	748.80	0.45	0.72	19.4	12.0	7.8	6.5	3%	3%	2.9%	4.2%	8180.1	8523.7	399.5	578.5	917.9	1092.9
NCC Group	144.40	4.20	4.73	34.3	30.5	11.1	10.4	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.50	0.54	0.57	8.3	7.9	5.2	5.0	5%	10%	4.0%	4.2%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.95	0.23	0.27	13.1	10.9	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9		
Persimmon	1068.50	86.62	92.96	12.3	11.5	0.9	0.9	nm	6%	3.7%	4.0%	3865.0	4106.3	429.3	458.7	453.3	485.8
Playtech	345.20	0.22	0.29	17.9	13.6	0.6	0.6	4%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	97.40	9.81	10.33	9.9	9.4	4.9	4.6	4%	8%	3.0%	3.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	23.88	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	3117.00	2.17	2.83	19.2	14.7	6.8	6.2	7%	7%	4.4%	4.7%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	167.40	13.90	16.67	12.0	10.0	6.5	6.1	5%	7%	3.0%	3.5%	3825.4	3979.6	297.7	330.3	635.0	677.9
Tate & Lyle	491.40	40.50	36.60	11.2	13.4	7.4	7.8	8%	8%	4.4%	4.0%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	77.38	5.27	6.09	14.7	12.7	0.7	0.7	3%	15%	7.8%	9.0%	3767.5	3993.3	287.3	325.9	293.6	333.4
Everplay Group	252.00	27.01	29.27	9.3	8.6	3.4	2.9	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	543.00	60.01	FALSE	9.0	FALSE	5.0	FALSE	8%	FALSE	5.2%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	254.00	0.04	0.06	85.0	60.7	29.2	20.6	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.79	0.26	0.28	18.4	17.1	10.4	7.5	nm	8%	0.4%	0.4%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	260.20	43.67	61.44	6.0	4.2	2.8	1.9	32%	6%	0.0%	0.0%	4301.4	4532.5	290.8	356.6	356.9	446.5
WH Smith	506.00	48.12	50.21	10.5	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	2353.00																
Wickes Group	172.40	21.94	26.33	7.9	6.5	4.7	4.1	5%	12%	7.0%	8.1%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	1052.00	-0.05	-3.04	nm	nm	8.8	7.1	31%	50%	0.0%	0.0%	5825.4	6934.0	78.8	-285.6	1218.9	1024.5

Closing prices as of: 07/06/2026