

Goodbody Market Commentary Metrics



October 2025																	
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
	1c	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
AIB Group	7.85	0.80	0.77	9.8	10.2	1.2	1.1			5.0%	5.2%	4428.2	4411.5	2087.0	2036.3		
Air France-KLM	11.55	6.42	5.79	1.8	2.0	3.4	3.0	55%	85%	0.0%	0.0%	33220.1	34529.6	1983.6	2122.4	4781.2	5066.2
Applied Nutrition	170.00	9.12	10.12	18.6	16.8	13.2	11.4	3%	4%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3
B&M European Value Ret	236.20	34.42	33.30	11.9	7.1	8.2	5.6	7%	13%	3.7%	6.3%	5571.0	5855.6	527.0	518.3	619.0	614.6
Bank of Ireland	14.28	1.20	1.42	11.9	10.1	1.1	1.0			4.5%	4.8%	4099.0	4148.1	1687.2	1777.2		
Bakkavor Group	208.00																
Barrat Redrow	388.50	35.48	29.14	10.9	13.2	0.7	0.7	nm	6%	4.1%	4.4%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2460.00	172.35	192.69	14.2	12.4	0.8	0.8	4%	9%	2.8%	3.2%	2780.5	2999.9	299.1	337.6	205.2	232.7
Berkley Group	3849.00	370.16	317.54	11.9	12.2	1.3	1.1	4%	6%	1.6%	3.1%	2486.5	2374.4	514.7	444.0	503.8	435.0
Bredon Group	344.20	30.91	33.50	11.1	10.3	6.1	5.5	5%	9%	4.4%	4.6%	1748.8	1832.9	162.1	126.9	284.3	304.4
Budes Technology	399.40	25.75	27.00	15.5	14.8	11.3	9.7	7%	8%	7.8%	8.7%	222.1	248.3	72.7	81.7	74.2	83.4
C & C Group	133.20	0.12	0.22	15.9	12.9	8.9	7.9	3%	6%	3.3%	4.2%	1665.5	1713.6	77.2	79.6	112.0	115.2
Clarn Homes	1.91	0.20	0.23	9.4	8.5	5.9	6.1	0%	18%	4.7%	5.2%	946.3	1045.0	162.6	177.7	182.1	182.6
Coca-Cola HBC	3346.00	2.67	2.86	14.4	13.5	9.2	8.5	4%	5%	3.0%	3.3%	11581.4	12241.7	1339.3	1445.6	1749.6	1872.4
Compass Group	2515.00	1.31	1.43	25.8	23.6	15.1	14.1	3%	3%	1.9%	2.1%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
Cranwick	4850.00	273.41	292.01	17.3	16.6	9.2	8.4	3%	3%	2.1%	2.2%	2723.3	2942.6	190.8	220.0	293.2	315.2
CBH	116.34	544.93	605.90	21.3	19.2	12.3	11.6	7%	8%	1.3%	1.3%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5
Delata Hotel Group	6.42																
DEC	4904.00	401.60	433.35	13.4	11.3	8.1	6.9	8%	12%	3.8%	4.4%	18011.1	14959.5	439.6	521.4	784.0	787.9
Devolver Digital	27.00	0.14	0.70	253.1	51.8	12.1	8.1	7%	6%	109.6	0.0%	118.9	0.6	4.4	5.2	9.0	
Diageo	1778.50	1.66	1.72	18.0	13.9	12.1	11.2	6%	6%	3.5%	4.3%	20245.0	20581.4	5897.0	6124.6	7422.0	6735.5
Dole	13.14	129.83	141.67	10.1	9.3	4.8	4.4	8%	13%	2.6%	2.7%	8885.2	8802.1	283.7	296.5	393.1	408.0
easyJet	465.40	69.60	78.55	6.7	5.9	2.2	1.9	18%	10%	3.1%	3.3%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	812.00	57.75	73.60	14.1	11.0	8.1	7.6	3%	7%	2.4%	2.5%	5351.6	5594.6	808.2	922.0	1139.2	1212.2
Evoke	47.35	11.35	17.65	4.2	2.7	5.3	4.5	36%	50%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	13.95	1.66	FALSE	8.4	FALSE	1.2	FALSE			42.9	FALSE	56.6	FALSE				
Fever-Tree Drinks	809.00	24.15	29.72	33.5	27.2	18.5	16.2	4%	4%	2.2%	2.3%	374.5	412.0	30.9	37.0	44.9	52.0
Flutter Entertainment	233.59	8.04	12.13	29.0	19.3	15.7	11.9	3%	5%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	180.60	13.07	14.50	13.8	12.5	7.7	6.1	7%	12%	3.2%	3.8%	380.9	413.7	41.4	49.9	62.4	74.3
Frontier Developments	463.00	587.49	849.11	0.8	0.5	4.6	4.2	4%	2%	90.6	0.0%	90.6	96.6	5.7	9.1	36.0	38.4
Fuller, Smith & Turner	596.00	34.22	40.26	19.2	14.8	8.6	7.9	nm	5%	3.0%	3.6%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop Group	14320.00	525.16	561.13	27.3	23.5	17.0	15.8	4%	4%	586.6	3.4%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	16.28	1.33	1.45	12.3	11.3	9.7	8.8	7%	9%	2.8%	3.0%	3871.8	3820.0	353.2	383.8	502.6	532.7
Glenveagh Properties	1.88	0.20	0.21	9.7	8.9	11.1	9.7	7%	7%	15%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9
Grafton Group	902.50	70.31	75.86	12.8	11.9	6.3	5.8	4%	7%	4.2%	4.4%	2525.1	2640.5	157.0	171.0	306.0	324.0
Greencoat Renewables	0.73	0.14	0.14	5.0	5.0	13.6	14.9	19%	19%	216.5	10.2%	216.5	215.4	189.2	187.9	189.2	187.9
Greencore	232.00																
Greqq	1665.00	129.34	132.76	12.9	12.5	6.1	5.7	nm	4%	3.9%	4.0%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerston	285.20																
Hostelworld Group	116.00	0.11	0.15	11.9	9.2	7.5	5.5	9%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	823.50	46.32	50.52	17.8	16.3	9.7	9.2	4%	5%	2.9%	3.3%	2418.6	2512.5	340.3	365.0	498.8	520.3
IAG	389.70	0.66	0.75	6.8	6.0	2.9	2.5	16%	19%	2.7%	3.3%	33522.1	34437.3	4950.0	5227.8	7569.5	8108.3
Ibstock	133.40	7.29	12.30	18.3	10.8	9.1	6.4	2%	11%	3.0%	4.6%	389.0	435.8	43.7	67.5	78.8	106.3
ICG	5.80	0.40	0.44	14.5	13.2	7.6	7.0	11%	4%	633.6	3.0%	633.6	664.4	74.1	79.3	143.1	148.3
IRIS REIT	0.97	0.06	0.13	16.2	7.3	0.0	2%	3%	4.8%	5.2%	65.7	67.6	54.7	92.0	52.0	89.4	
J D Wetherspoon	624.00	48.06	53.97	13.9	11.6	7.2	7.3	8%	6%	1.8%	1.9%	2127.5	2223.5	146.4	151.2	259.7	264.7
Jet2	1401.00	217.83	194.54	6.6	7.2	1.5	1.4	23%	13%	1.1%	1.4%	7173.5	7565.2	446.5	450.6	728.6	782.8
Kainos Group	949.50	30.80	33.66	29.6	28.2	19.9	17.3	5%	4%	367.2	2.6%	367.2	395.6	41.8	51.9	49.6	59.8
Kerry Group	75.95	4.90	5.41	15.5	14.0	11.7	10.7	5%	5%	1.8%	2.0%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5
Kingsfisher	299.70	20.41	19.97	12.9	15.0	5.5	5.8	10%	8%	4.7%	4.1%	12784.0	12842.4	628.0	608.8	1299.0	1277.8
Kingspan	72.15	3.83	4.15	18.8	17.4	12.6	11.8	4%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	7.36	1.14	1.29	6.5	5.7	6.7	6.2	19%	20%	4.6%	5.2%	39502.4	41427.8	2001.1	2229.4	3317.0	3627.3
Marston's	38.75	7.80	8.74	5.0	4.4	7.2	6.8	16%	17%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	238.00	28.97	30.05	8.2	7.9	6.0	5.7	8%	6%	0.0%	0.0%	2712.1	2822.2	325.8	330.1	458.5	466.9
Molten Ventures	401.20	48.11	47.64	8.3	8.4	7.7	7.9	9%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	837.20	0.96	1.21	10.0	8.0	6.4	5.5	1%	11%	6.7%	7.1%	8059.9	8683.9	702.8	839.2	1186.4	1351.5
NCC Group	145.00	5.53	7.09	26.2	20.5	9.7	8.5	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	4.00	0.52	0.54	7.8	7.4	6.4	6.0	nm	6%	4.3%	4.5%	2177.5	2256.2	79.6	83.8	111.3	117.1
Permanent TSB	2.20	0.08	0.21	29.0	10.3	0.5	0.5	0%	0%	0.9%	3.2%	653.5	693.8	128.5	172.3		
Persimmon	1142.50	93.59	104.31	12.2	11.0	1.0	1.0	5%	5%	3.5%	3.5%	3523.6	3758.4	444.9	489.6	467.4	514.9
Playtech	353.00	0.14	0.20	29.4	20.3	0.7	0.7	1%	3%	0.0%	0.0%	797.8	831.6	73.9	89.4	175.2	193.7
Rank Group	129.40	7.76	8.63	16.7	15.0	7.0	6.6	1%	1%	782.2	1.1%	782.2	818.7	53.7	60.7	105.7	112.1
Ryanair	25.09	1.45	2.05	12.5	12.2	6.7	7.1	10%	9%	2.2%	1.7%	13948.5	15245.3	1558.0	2339.5	2722.4	3613.8
Soufflt Westrock	40.94	2.95	3.28	13.9	12.5	6.8	6.0	5%	8%	4.2%	4.5%	31378.3	32808.0	2453.2	2905.7	5120.3	5664.4
SSP Group	166.50	11.63	13.50	14.3	12.3	7.1	6.3	nm	2%	2.4%	2.8%	3690.9	3890.4	274.2	297.5	571.6	650.8
Tate & Lyle	359.40	50.26	38.68	13.1	9.3	10.1	7.2	7%	3%	3.0%	5.6%	1736.4	2039.7	282.6	282.6	380.6	420.7
Taylor Wimpey	105.10	8.00	9.30	13.1	11.3	0.9	0.9	3%	9%	8.9%	9.5%	3767.6	4015.1	428.1	490.5	435.6	497.2
Everplay Group	375.00	26.38	28.01	14.2	13.4	6.1	5.5	5%	5%	0.0%	0.0%	175.9	181.2	35.8	38.9	69.7	72.2
Travis Perkins	631.50	49.14	60.01	12.9	10.5	6.1	5.5	7%	7%	3.6%	4.4%	4697.5	4874.0	161.4	196.2	354.3	391.5
Trustpilot Group	217.00	0.03	0.05	96.0	64.2	37.1	28.3	3%	4%	0.0%	0.0%	249.2	285.1	17.6	25.7	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	634.40	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	353.4	400.5
WH Smith	651.00	61.56	65.61	10.6	9.9	9.6	9.5	5%	6%	5.2%	4.3%	1530.1	1618.5	139.7	148.4	200.9	200.2
Whitbread	3256.00																
Wickes Group	221.50	17.68	22.15	12.5	10.0	5.7	5.0	4%	8%	4.8%	5.4%	1606.9	1685.2	72.5	87.5	191.4	205.8
Wizz Air	1174.00	1.67	0.60	11.8	22.7	9.6	7.6	25%	33%	0.0%	0.0%	5267.6	6070.6	167.5	222.7	1134.3	134.