

Goodbody Market Commentary Metrics



09 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	9.39	0.84	0.92	11.1	10.2	1.4	1.3			5.8%	6.3%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	9.88	3.93	5.19	2.5	1.9	3.6	3.3	72%	94%	0.0%	0.0%	34741.0	36232.6	1580.8	1934.8	4779.8	5366.7
Applied Nutrition	225.50	11.41	12.82	19.8	17.6	13.4	11.7	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	185.00	21.43	22.68	8.6	8.2	6.1	5.9	13%	13%	5.4%	5.5%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	16.34	1.47	1.78	11.1	9.2	1.2	1.1			4.9%	5.8%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	267.50	29.14	35.88	9.2	7.5	0.5	0.4	nm	14%	6.4%	7.7%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2060.00	188.09	228.21	11.0	9.0	0.7	0.6	16%	10%	3.6%	4.5%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	3424.00	342.80	354.08	10.0	9.7	0.9	0.8	5%	13%	3.5%	1.9%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	316.00	29.89	35.36	10.6	8.9	5.6	5.0	9%	9%	5.1%	5.3%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bvies Technology	293.60	22.47	24.51	13.1	12.0	8.5	7.3	9%	8%	9.3%	10.3%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	123.00	0.11	0.11	13.5	13.0	8.0	8.2	4%	5%	4.5%	4.5%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.22	0.23	0.25	9.8	8.7	6.8	6.4	5%	9%	5.2%	5.6%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4406.00	2.92	3.14	17.4	16.1	10.5	9.7	4%	4%	2.6%	2.8%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	2166.41	1.46	1.58	20.0	18.4	11.4	10.7	4%	5%	2.5%	2.7%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranwick	5310.00	297.22	315.87	17.9	16.8	8.9	8.4	3%	3%	2.9%	2.1%	2279.5	2401.5	240.1	240.1	325.1	344.0
CBH	113.82	583.63	654.68	19.5	17.4	11.1	10.3	9%	10%	1.4%	1.4%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	4980.00	421.97	505.84	11.8	9.8	7.1	6.6	11%	12%	4.4%	4.6%	14964.1	15168.2	521.6	521.6	788.0	829.2
Devolver Digital	22.00	0.18	0.67	168.5	44.5	8.6	6.2	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1438.20	1.59	1.59	12.2	12.2	11.0	10.7	7%	7%	2.8%	3.4%	19668.2	19214.0	5720.2	5573.1	6294.6	6098.5
Dole	15.13	135.26	144.02	11.2	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	392.90	53.51	60.02	7.3	6.5	2.0	2.2	2%	2%	3.9%	2.0%	11134.7	11814.8	540.1	649.6	1415.8	1658.9
Entain	584.20	64.59	77.21	9.0	7.6	6.9	6.6	10%	12%	3.5%	3.7%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	31.00	17.65	FALSE	1.8	FALSE	4.4	FALSE	77%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.70																
Fever-Tree Drinks	822.50	29.14	39.37	28.2	20.9	17.1	13.1	4%	6%	2.3%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	109.20	9.08	13.27	12.0	8.2	8.4	6.3	9%	13%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	162.80	13.41	15.15	12.1	10.7	6.6	5.8	13%	12%	5.1%	4.8%	403.4	434.0	43.6	47.6	63.8	69.3
Frontier Developments	375.00	849.11	0.00	0.4	nm	2.9	3.0	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	680.00	43.47	48.57	15.6	14.0	8.2	7.8	4%	5%	3.5%	4.1%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	18750.00	547.81	585.95	34.2	32.0	21.2	19.7	3%	3%	2.6%	2.8%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	20.55	1.47	1.60	14.0	12.9	10.4	9.5	6%	7%	2.7%	3.0%	3962.9	4096.6	400.1	431.8	525.8	558.4
Glenveagh Properties	2.04	0.21	0.22	9.7	9.1	10.9	9.6	15%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	925.00	74.77	80.43	12.4	11.5	6.0	5.5	6%	7%	263.2	4.5%	2623.2	2724.0	168.3	183.3	321.3	341.3
Greencoat Renewables	0.74	0.05	FALSE	14.5	FALSE	20.5	FALSE	18%	FALSE	9.3%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	244.40	16.21	23.18	15.1	10.5	8.6	6.2	5%	10%	2.0%	2.8%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1591.00	122.02	122.78	13.0	13.0	5.5	5.2	4%	6%	4.3%	4.3%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerston	317.80	22.65	24.70	14.0	12.9	0.8	0.7	8%	10%	5.6%	5.9%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	102.00	0.13	0.18	9.1	6.6	5.8	4.0	13%	20%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	837.00	51.39	57.32	16.3	14.6	9.1	8.5	6%	5%	2.7%	2.9%	2501.6	2598.8	372.0	405.0	535.2	571.6
IAG	389.40	0.68	0.78	6.6	5.8	3.5	3.3	11%	10%	2.3%	2.5%	34336.2	35530.4	4925.0	5122.7	7271.1	7737.9
Ibstock	109.50	6.26	7.53	17.5	14.5	8.2	7.5	5%	8%	2.9%	3.4%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.42	0.49	0.54	13.1	11.9	7.6	6.8	4%	12%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.03	0.13	0.15	8.1	7.0	0.7	0.7	2%	3%	5.6%	5.6%	67.6	70.0	90.2	101.6	87.6	99.1
J.D. Wetherspoon	617.00	46.07	51.49	13.4	12.0	7.4	7.1	6%	6%	1.9%	1.9%	2222.8	2319.4	132.0	139.1	247.2	255.0
Jet2	1206.00	190.10	189.04	6.3	6.4	0.9	0.9	8%	13%	1.5%	1.5%	7605.5	8182.1	429.5	414.8	777.4	783.6
Kainos Group	781.00	32.66	38.15	23.2	20.5	13.9	12.0	5%	7%	3.2%	3.2%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	68.60	5.01	5.52	13.7	12.4	10.6	9.6	6%	6%	2.2%	2.5%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingfisher	302.80	22.02	23.73	13.7	12.8	5.7	5.2	6%	10%	4.1%	4.1%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	77.90	4.18	4.62	18.6	16.9	12.4	11.3	4%	5%	0.8%	0.9%	8994.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	8.12	1.14	1.46	7.1	5.5	7.9	6.6	17%	22%	4.2%	5.4%	41422.2	43345.4	1903.2	2543.7	3086.8	3746.1
Manston's	56.30	9.02	10.21	6.2	5.5	7.1	6.6	15%	16%	0.0%	3.6%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	265.00	31.57	33.42	8.4	7.9	5.9	5.5	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	488.80	33.24	46.11	14.7	10.6	12.2	8.8	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	873.80	0.53	0.94	19.0	10.7	8.0	6.3	3%	3%	2.9%	4.7%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	122.40	4.20	4.73	29.1	25.9	9.6	8.9	4%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.74	0.54	0.57	8.7	8.3	5.5	5.2	5%	10%	3.8%	4.0%	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	1175.00	103.14	116.00	11.4	10.1	1.0	0.9	5%	9%	3.4%	3.6%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	392.40	0.22	0.29	20.2	15.4	0.7	0.7	3%	5%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	94.60	9.81	10.33	9.6	9.2	4.8	4.5	4%	8%	3.1%	3.5%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	26.80	2.08	2.18	12.9	12.3	7.3	6.8	8%	7%	1.6%	1.7%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1
Smurfit Westrock	41.99	2.39	3.21	17.5	13.1	6.7	5.9	7%	8%	4.4%	4.7%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	190.00	13.90	16.80	13.7	11.3	6.6	6.3	5%	6%	2.6%	3.1%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	344.30	41.43	45.31	8.3	7.6	7.0	6.5	6%	12%	5.9%	6.2%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	88.22	7.69	9.29	11.5	9.5	0.8	0.8	7%	8%	11.3%	11.9%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	251.00	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	580.50	60.01	FALSE	9.7	FALSE	5.2	FALSE	8%	FALSE	4.8%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	220.00	0.04	0.06	74.0	52.8	25.2	17.7	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unigipar	3.95	0.24	0.27	16.1	14.9	8.9	6.1	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	358.40	22.97	31.92	15.6	11.2	2.6	2.3	31%	9%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1
WH Smith	611.00	53.43	60.06	11.4	10.2	6.4	5.9	0%	6%	3.6%	4.0%	1607.2	1683.6	136.1	148.7	189.9	204.2
Whitbread	2480.00																
Wickes Group	221.00	21.84	26.24	10.1	8.4	5.0	4.4	7%	10%	5.4%	5.4%	1710.3	1779.7	81.7	93.0	206.0	222.8
Wizz Air	952.50	-0.54	-1.95	nm													