

Goodbody Market Commentary Metrics



11 May 2026																				
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA				
		1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027		
AIB Group	9.65		0.84	0.92	11.5	10.5	1.4	1.4			5.6%	6.1%	4566.0	4699.2	2215.3	2291.2				
Air France-KLM	10.21		3.90	8.34	2.6	1.2	3.6	2.8	69%	113%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2		
Applied Nutrition	217.00		11.41	12.82	19.0	16.9	12.9	11.2	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0		
B&M European Value Retn	173.90		21.43	22.68	8.1	7.7	5.8	5.6	14%	14%	5.8%	5.9%	5771.2	5996.4	357.3	368.3	454.0	466.9		
Bank of Ireland	16.66		1.47	1.78	11.3	9.4	1.2	1.1			4.8%	5.7%	4238.5	4481.1	1837.5	2016.4				
Barratt Redrow	263.20		29.14	35.88	9.0	7.3	0.4	0.4	nm	14%	6.5%	7.8%	5805.3	6417.2	609.3	726.2	613.7	727.7		
Beauty Tech Group	326.00		21.04	24.57	15.5	13.3	7.4	5.9	8%	10%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0		
Bellway	1984.00		183.78	213.85	10.8	9.3	0.6	0.6	4%	14%	3.8%	4.7%	3049.1	3233.9	325.0	364.3	328.1	367.3		
Berkeley Group	3338.00		342.80	354.08	9.7	9.4	0.9	0.8	5%	13%	3.6%	2.1%	2270.4	2331.6	452.2	459.2	441.0	447.0		
Breedon Group	302.20		30.07	34.93	10.0	8.7	5.5	5.0	9%	8%	5.2%	5.5%	1786.3	1862.1	142.0	158.9	281.4	302.7		
Bvies Technology	313.40		22.47	24.51	13.9	12.8	9.2	8.0	8%	8%	8.7%	9.6%	224.8	243.9	63.7	71.2	65.5	73.2		
C & C Group	112.40		0.11	0.11	12.4	11.8	7.6	7.8	5%	6%	4.9%	4.9%	1586.8	1545.6	71.8	72.5	107.4	108.1		
Cairn Homes	2.32		0.23	0.25	10.2	9.1	7.1	6.7	5%	9%	5.0%	5.4%	1065.6	1204.2	181.7	200.5	183.8	203.1		
Coca-Cola HBC	4250.00		2.92	3.14	16.8	15.6	10.2	9.4	4%	4%	2.6%	2.8%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5		
Compass Group	29.50		1.46	1.58	20.3	18.6	11.5	10.8	4%	4%	2.5%	2.7%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5		
Cranwick	5250.00		297.22	315.87	17.7	16.6	8.8	8.3	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0		
CRH	113.75		585.55	660.57	19.4	17.2	11.0	10.1	9%	10%	1.4%	1.4%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4		
DCC	5750.00		421.97	505.84	13.6	11.4	8.1	7.5	10%	10%	3.8%	4.0%	14964.1	15168.2	521.6	559.4	788.0	829.2		
Devolver Digital	21.50		0.18	0.67	166.8	44.1	8.5	6.1	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8		
Diageo	1544.00		1.59	1.61	13.2	13.0	11.5	11.0	7%	6%	2.6%	3.1%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2		
Dole	14.88		135.26	144.02	11.0	10.3	4.8	4.4	11%	12%	2.3%	2.4%	9488.2	9634.5	284.2	293.4	407.7	419.3		
easyJet	361.30		18.11	33.65	20.0	10.7	2.5	2.6	nm	nm	4.3%	4.7%	10928.0	11793.0	138.2	365.0	1105.1	1393.5		
Entain	548.00		60.21	71.83	9.1	7.6	6.5	6.0	11%	12%	3.8%	4.0%	5574.3	5794.4	869.4	980.2	1162.3	1237.4		
Evoke	34.85		17.65	FALSE	2.0	FALSE	4.4	FALSE	68%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE		
FBD Holdings	16.40		1.47	1.57	11.1	10.5	1.3	1.3												
Fever-Tree Drinks	807.50		29.14	39.37	27.7	20.5	16.7	12.8	4%	6%	2.3%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7		
Flutter Entertainment	102.87		6.44	9.79	16.0	10.5	9.7	7.3	4%	8%	0.0%	0.0%	18493.9	20523.2	2179.9	2959.7	2919.7	3780.6		
Forterra	156.00		13.41	15.15	11.6	10.3	6.4	5.6	14%	12%	5.3%	6.0%	403.4	434.0	43.6	47.6	63.8	69.3		
Frontier Developments	315.00		849.11	0.00	0.4	nm	2.4	2.4	6%	9%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3		
Fuller, Smith & Turner	650.00		43.47	48.57	15.0	13.4	8.0	7.6	4%	5%	3.6%	3.9%	396.2	413.5	43.2	47.6	73.3	76.9		
Games Workshop Group	19605.00		547.81	585.95	35.8	33.5	22.2	20.6	3%	3%	2.5%	2.7%	625.0	671.8	238.5	254.4	283.9	305.1		
Glanbia	23.01		1.47	1.60	15.6	14.4	11.6	10.5	5%	6%	2.4%	2.7%	3952.9	4096.6	400.1	431.8	525.8	558.4		
Glenveagh Properties	2.23		0.21	0.22	10.7	10.0	12.0	10.6	14%	10%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	154.3	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	2724.0	168.3	183.3	321.3	341.3		
Greencoast Renewables	0.77		0.05	FALSE	15.1	FALSE	20.8	FALSE	17%	FALSE	8.9%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE		
Greencore	235.80		18.17	22.96	13.0	10.3	8.3	5.9	6%	10%	1.2%	1.9%	3498.9	4334.8	225.8	317.8	331.2	447.1		
Grosgos	1489.00		122.02	122.78	12.2	12.1	5.2	4.9	5%	7%	4.6%	4.6%	2279.9	2406.4	189.7	191.2	372.4	390.2		
Hammerson	328.20		22.65	24.70	14.5	13.3	0.8	0.8	8%	10%	5.4%	5.8%	215.9	232.2	177.7	192.3	177.7	192.2		
Hostelworld Group	107.00		0.13	0.18	9.7	7.0	6.2	4.3	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9		
Howden Joinery	780.50		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		
JAG	385.00		0.64	0.74	7.0	6.0	3.6	3.4	12%	9%	35101.0	36582.9	4648.7	4925.7	6994.8	7540.9				
Ibstock	99.70		6.26	7.53	15.9	13.2	7.7	7.0	5%	8%	3.2%	3.8%	399.2	429.6	36.3	42.9	71.8	77.3		
ICG	6.60		0.49	0.54	13.5	12.3	7.8	7.0	4%	12%	2.5%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1		
IRIS REIT	1.02		0.12	0.15	8.1	7.0	0.7	0.7	2%	3%	5.6%	5.6%	67.6	70.0	80.2	101.6	87.6	99.1		
J.D. Wetherspoon	600.00		46.02	51.49	13.0	11.7	7.3	7.1	6%	6%	2.0%	2.0%	2222.8	2319.4	122.0	139.1	247.3	255.0		
Jet2	1137.00		190.52	113.44	6.0	10.0	0.3	1.2	26%	nm	1.5%	1.6%	7618.1	8026.6	437.5	226.8	777.1	618.5		
Kaines Group	813.00		33.13	43.31	24.5	18.8	15.4	11.5	7%	8%	3.0%	3.1%	430.3	499.9	45.9	61.9	53.8	70.8		
Kerry Group	72.20		5.01	5.51	14.4	13.1	11.0	10.0	6%	6%	2.1%	2.3%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4		
Kingfisher	288.40		23.42	25.12	12.1	11.5	5.3	5.2	10%	10%	4.4%	4.3%	12945.0	13234.4	651.0	685.9	1327.0	1326.8		
Kingspan	77.95		4.18	4.62	18.6	16.9	12.4	11.3	4%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6		
Lufthansa	8.14		1.08	1.33	7.6	6.1	8.2	6.8	17%	22%	4.0%	4.9%	41488.5	43955.2	1801.9	2341.3	2985.7	3607.3		
Marston's	51.60		9.02	10.21	5.7	5.1	7.0	6.5	17%	17%	0.0%	3.9%	908.6	930.0	166.0	174.5	211.6	220.0		
Mitchells & Butlers	259.00		31.57	33.42	8.2	7.7	5.8	5.4	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1		
Molten Ventures	594.50		33.24	46.11	17.9	14.7	10.7	7.7	1%	3%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8		
Mondi	781.40		0.45	0.72	20.3	12.5	7.9	6.6	2%	3%	2.8%	4.0%	8180.1	8523.7	399.5	578.5	917.9	1092.9		
NCC Group	140.20		4.20	4.73	33.4	29.6	10.8	10.1	3%	3%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3		
Orion 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	2.91		0.23	0.27	12.9	10.7	0.7	0.7	0.7	0.7	2.4%	2.4%	708.5	762.2	191.4	219.9				
Persimmon	1113.50		102.91	113.64	10.8	9.8	0.9	0.9	nm	7%	3.6%	3.8%	4017.7	4280.1	502.4	550.8	526.6	578.2		
Playtech	352.20		0.22	0.29	18.3	13.9	0.7	0.6	4%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2		
Rank Group	100.00		9.81	10.33	10.2	9.7	5.0	4.7	4%	7%	2.9%	3.3%	852.6	919.9	67.6	71.2	123.4	129.6		
Ryanair	23.78		2.06	2.16	11.5	11.0	6.5	6.0	10%	7%	1.8%	1.9%	15481.8	16340.1	2416.6	2463.7	3754.1	3849.4		
Smurfit Westrock	3106.00		2.17	2.83	19.5	14.9	6.9	6.3	7%	7%	4.3%	3.6%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8		
SSP Group	161.20		13.90	16.80	11.6	9.6	6.3	6.0	6%	7%	3.1%	3.6%	3815.7	4005.7	304.0	331.4	650.8	681.4		
Tate & Lyle	370.80		40.87	43.21	9.1	8.6	6.1	5.8	6%	12%	5.4%	5.7%	2014.2	2013.8	287.5	292.1	417.9	422.2		
Taylor Wimpey	82.82		7.69	9.29	10.8	8.9	0.7	0.7	7%	9%	12.1%	12.7%	3944.4	4240.8	413.6	494.0	420.5	502.0		
Everplay Group	266.00		27.01	29.27	9.8	9.1	3.7	3.2	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3		
Travis Perkins	535.00		60.01	FALSE	8.9	FALSE	5.0	FALSE	9%	FALSE	5.2%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE		
Trustpilot Group	258.60		0.04	0.06	88.1	62.9	30.3	21.4	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9		
Uniphyl	4.30		0.26	0.28	16.5	15.3	9.6	8.8	nm	9%	0.5%	0.5%	3210.0	3357.8	107.1	115.0	147.7	165.8		
Vistry Group	348.60		22.97	31.92	15.2	10.9	2.5	2.2	31%	9%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	43			