

Goodbody Market Commentary Metrics



13 February 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	8.97	0.82	0.90	11.0	9.9	1.3	1.2			4.8%	5.9%	4563.4	4702.4	2188.1	2269.9		
Air France-KLM	11.79	5.45	5.94	2.2	2.0	3.2	3.0	50%	77%	0.0%	0.0%	34388.7	35879.4	2068.3	2203.2	5100.1	5357.8
Applied Nutrition	233.50	10.87	12.23	21.5	19.1	14.7	12.7	2%	3%	0.0%	0.0%	134.8	150.5	36.4	40.4	37.9	42.0
B&M European Value Ret	178.95	21.43	22.68	8.3	7.9	6.0	5.8	14%	13%	5.6%	5.7%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	16.66	1.56	1.81	10.7	9.2	1.2	1.1			4.1%	4.5%	4181.7	4414.4	1794.1	2007.6		
Barratt Redrow	393.00	29.14	35.88	13.5	11.0	0.7	0.6	nm	10%	4.3%	5.2%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2836.00	188.09	228.21	15.1	12.4	0.9	0.9	11%	7%	2.6%	3.3%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	4384.00	342.80	354.08	12.8	12.4	1.2	1.1	4%	10%	2.8%	1.5%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	358.60	29.89	35.36	12.0	10.1	6.1	5.5	8%	8%	4.5%	4.7%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bytes Technology	291.40	23.50	26.39	12.4	11.0	8.2	6.8	9%	9%	9.9%	11.2%	228.1	250.9	67.0	77.2	68.7	79.2
C & C Group	115.80	0.11	0.11	12.7	12.3	7.7	7.9	5%	6%	4.8%	4.8%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.24	0.23	0.24	9.9	9.3	6.9	6.6	12%	8%	4.5%	4.9%	1045.0	1088.4	177.7	185.0	182.6	190.7
Coca-Cola HBC	4722.00	2.92	3.14	18.6	17.3	11.2	10.3	4%	4%	2.4%	2.6%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6
Compass Group	2035.00	1.46	1.58	19.1	17.5	10.9	10.3	4%	5%	2.6%	2.9%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranswick	5350.00	297.22	315.87	18.0	16.9	9.0	8.5	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0
CRH	122.85	585.31	655.21	21.0	18.7	12.0	11.2	8%	8%	1.3%	1.3%	39902.0	41603.7	6010.9	6484.8	8197.4	8755.4
DCC	5190.00	421.97	505.84	12.3	10.3	7.4	6.8	11%	11%	4.2%	4.4%	14964.1	15168.2	521.6	559.4	788.0	829.2
Devolver Digital	25.50	0.18	0.67	198.3	52.4	11.1	8.0	6%	7%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1849.00	1.63	1.73	15.5	14.6	12.8	12.2	6%	6%	4.1%	4.3%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4
Dole	15.78	148.86	158.22	10.6	10.0	4.9	4.5	9%	10%	2.4%	2.5%	9085.1	9270.0	298.4	309.0	408.0	418.5
easyJet	478.20	73.47	81.16	6.5	5.9	2.0	2.0	7%	7%	3.2%	3.6%	11209.3	11869.9	738.1	848.5	1613.7	1857.8
Entain	595.20	64.59	77.21	9.2	7.7	7.0	6.7	10%	12%	3.5%	3.6%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoko	27.85	17.65	FALSE	1.6	FALSE	4.3	FALSE	86%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.35																
Fever-Tree Drinks	969.00	29.23	39.36	33.2	24.6	20.5	15.8	3%	4%	2.0%	2.1%	405.4	444.5	35.8	50.5	50.1	65.1
Flutter Entertainment	143.30	9.59	13.56	14.9	10.6	9.7	7.5	7%	11%	0.0%	0.0%	19892.4	21998.8	2867.6	3720.0	3583.7	4511.9
Forterra	190.20	14.50	18.85	13.1	10.1	6.4	5.0	11%	13%	3.6%	4.7%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	411.50	849.11	0.00	0.5	nm	3.2	3.3	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	708.00	43.47	48.57	16.3	14.6	8.4	8.1	4%	5%	3.3%	3.6%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	16650.00	547.81	585.95	30.4	28.4	18.8	17.4	3%	3%	2.9%	3.2%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	20.07	1.45	1.58	13.8	12.7	9.8	8.8	7%	7%	2.5%	2.7%	3890.9	4044.9	382.4	417.4	530.1	566.4
Glenveagh Properties	2.09	0.21	0.22	9.9	9.5	11.3	10.4	13%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6
Grafton Group	978.80	74.77	80.43	13.1	12.2	6.3	5.8	6%	7%	4.1%	4.3%	2623.2	2724.0	168.3	183.3	321.3	341.3
Greencoat Renewables	0.69	0.05	FALSE	13.6	FALSE	19.9	FALSE	19%	FALSE	9.9%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	271.00	16.21	23.18	16.7	11.7	9.3	6.7	5%	9%	1.8%	2.6%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1579.00	124.39	132.84	12.7	11.9	5.4	4.9	3%	8%	3.9%	4.2%	2305.8	2459.0	189.7	201.4	372.0	401.3
Hammerson	354.00	22.46	26.19	15.8	13.5	0.9	0.9	11%	17%	7.2%	7.1%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	113.50	0.15	FALSE	9.0	FALSE	5.4	FALSE	13%	FALSE	0.0%	FALSE	107.8	FALSE	12.1	FALSE	24.0	FALSE
Howden Joinery	874.00	50.52	53.31	17.3	16.4	9.7	9.4	5%	5%	3.1%	3.3%	2512.5	2609.6	365.0	376.9	528.4	544.6
IAG	429.80	0.78	0.87	6.3	5.7	2.7	2.4	17%	20%	2.1%	2.2%	34358.9	35651.9	5414.3	5569.3	8289.9	8602.6
Ibstock	132.20	7.48	9.52	17.7	13.9	9.1	7.9	7%	8%	2.8%	3.6%	408.3	436.2	41.1	51.7	77.4	86.6
ICG	6.12	0.49	0.54	12.5	11.4	7.3	6.5	4%	13%	2.8%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.09	0.14	0.15	8.0	7.1	0.8	0.7	2%	3%	4.8%	5.1%	67.6	69.9	93.9	102.4	90.4	98.9
J D Wetherspoon	734.00	48.97	53.22	15.0	13.8	7.8	7.6	5%	6%	1.6%	1.6%	2243.1	2356.2	141.1	146.1	256.5	262.3
Jet2	1239.00	187.52	199.17	6.6	6.2	1.4	1.1	9%	16%	1.4%	1.4%	7595.5	8223.8	432.0	440.2	770.2	810.0
Kainos Group	699.50	33.66	38.15	20.8	18.3	12.2	10.6	6%	8%	3.5%	3.6%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	78.00	5.35	5.89	14.6	13.3	10.9	9.8	5%	6%	2.0%	2.2%	7072.9	7358.0	1007.1	1101.6	1309.5	1406.0
Kingfisher	356.60	22.02	23.73	16.2	15.0	6.4	5.9	5%	9%	3.5%	3.5%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	84.10	4.25	4.81	19.8	17.5	13.3	12.1	4%	4%	0.7%	0.8%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5
Lufthansa	9.00	1.24	1.54	7.3	5.9	7.1	6.3	16%	19%	4.1%	5.1%	41784.6	43685.5	2152.9	2614.6	3493.5	3976.2
Marston's	63.00	9.02	10.21	7.0	6.2	7.3	6.8	14%	14%	0.0%	3.2%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	287.50	31.57	33.42	9.1	8.6	6.2	5.8	6%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	475.00	33.24	46.11	14.3	10.3	11.8	8.6	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8
Mondi	958.80	0.89	1.10	12.3	10.0	7.2	6.5	3%	5%	5.5%	5.9%	7951.4	8356.1	651.6	765.8	1120.7	1233.8
NCC Group	132.60	4.20	4.73	31.5	28.0	10.3	9.6	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.31	0.54	0.57	7.9	7.6	5.1	4.8	6%	11%	4.2%	4.4%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.11	0.21	0.29	15.1	10.9	0.7	0.7			2.3%	3.9%	698.1	766.6	171.7	221.2		
Persimmon	1528.00	103.14	116.00	14.8	13.2	1.3	1.2	3%	7%	2.6%	2.8%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	341.50	0.20	0.28	19.6	14.0	0.6	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	90.00	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	26.70	2.10	2.32	12.7	11.5	7.0	6.3	11%	7%	1.6%	1.7%	15448.0	16196.0	2451.5	2639.1	3789.1	4024.8
Smurfit Westrock	51.61	2.84	3.88	18.2	13.3	7.5	6.5	5%	6%	3.1%	3.8%	32397.6	34040.7	2587.4	3228.4	5312.1	5959.1
SSP Group	185.60	13.90	16.80	13.4	11.0	6.5	6.3	6%	6%	2.7%	3.2%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	403.40	41.43	45.31	9.7	8.9	7.6	7.1	5%	11%	5.0%	5.3%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	116.30	7.69	9.29	15.1	12.5	1.0	1.0	5%	6%	8.6%	9.0%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	292.00	28.01	29.78	10.4	9.8	4.0	3.5	7%	7%	0.0%	0.0%	181.2	186.9	38.9	42.3	72.2	72.3
Travis Perkins	707.00	60.01	FALSE	11.8	FALSE	5.9	FALSE	6%	FALSE	4.0%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	134.00	0.04	0.06	45.7	32.7	15.0	10.4	5%	7%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unipharm	3.97	0.24	0.27	16.2	15.0	8.9	6.2	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	730.00	46.20	55.16	15.8	13.2	5.1	4.2	16%	15%	0.0%	0.0%	4249.6	4647.3	371.9	426.5	484.0	558.5
WH Smith	685.50	56.72	61.98	12.1	11.1	9.2	8.6	1%	6%	3.4%	3.7%	1615.2	1697.8	142.5	152.2	196.6	208.3
Whitbread	2725.00																
Wickes Group	234.50	21.84	26.24	10.7	8.9	5.2	4.6	7%									