

Goodbody Market Commentary Metrics



14 January 2026																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	9.48	0.82	0.90	11.6	10.5	1.3	1.3			4.6%	5.6%	4563.4	4702.4	2188.1	2269.9		
Air France-KLM	11.27	5.23	5.66	2.2	2.0	3.3	3.0	52%	79%	0.0%	0.0%	34235.8	35682.0	2000.2	2117.3	5017.9	5256.6
Applied Nutrition	247.00	10.87	12.23	22.7	20.2	15.5	13.6	2%	3%	0.0%	0.0%	134.8	150.5	36.4	40.4	37.9	42.0
B&M European Value Ret	165.10	24.04	26.87	6.9	6.1	5.2	5.0	17%	15%	6.4%	7.3%	5812.2	6077.1	392.9	419.7	490.2	519.6
Bank of Ireland	16.79	1.56	1.81	10.7	9.3	1.2	1.1			4.1%	4.5%	4181.7	4414.4	1794.1	2007.6		
Bakkavor Group	245.00																
Barratt Redrow	377.90	29.14	35.88	13.0	10.5	0.6	0.6	nm	10%	4.5%	5.4%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2734.00	188.09	228.21	14.5	12.0	0.9	0.8	12%	7%	2.7%	3.4%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	3982.00	342.80	354.08	11.6	11.2	1.0	1.0	4%	11%	3.0%	1.6%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	328.40	29.89	35.36	11.0	9.3	5.8	5.2	9%	9%	4.9%	5.1%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bytes Technology	367.60	23.50	26.39	15.6	13.9	10.8	9.1	7%	7%	7.8%	8.9%	228.1	250.9	67.0	77.2	68.7	79.2
C & C Group	132.00	0.12	0.14	12.5	11.1	7.8	7.5	5%	7%	4.2%	4.5%	1602.7	1597.1	79.7	84.9	115.3	120.5
Cairn Homes	2.07	0.23	0.24	9.2	8.6	6.4	6.0	13%	9%	4.8%	5.3%	1045.0	1088.4	177.7	185.0	182.6	190.7
Coca-Cola HBC	3846.00	2.89	3.13	15.4	14.2	9.4	8.7	4%	5%	2.9%	3.1%	12315.3	13029.4	1465.0	1580.5	1894.4	2021.9
Compass Group	2314.00	1.44	1.56	21.6	20.0	12.1	11.4	4%	4%	2.3%	2.5%	50221.3	53448.4	3654.2	3916.5	5022.0	5300.0
Cranswick	4910.00	291.57	310.55	16.8	15.8	8.5	7.9	3%	3%	2.2%	2.3%	2942.6	3119.6	219.7	231.7	316.0	333.7
CRH	127.38	585.33	655.23	21.8	19.4	12.5	11.6	7%	8%	1.2%	1.3%	39902.0	41603.7	6011.0	6485.0	8197.6	8755.5
DCC	4368.00	433.35	498.92	10.1	8.8	6.3	5.8	13%	14%	5.0%	5.2%	14959.5	15055.9	521.4	549.3	787.9	819.1
Devolver Digital	22.00	0.18	0.67	168.3	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	1664.00	1.67	1.78	13.4	12.6	11.6	11.0	7%	7%	4.6%	4.9%	20139.3	20870.6	5929.4	6253.1	6522.6	6843.1
Dole	14.59	148.86	158.22	9.8	9.2	4.6	4.3	9%	11%	2.6%	2.7%	9085.1	9270.0	298.4	309.0	408.0	418.5
easyJet	489.30	72.79	80.15	6.7	6.1	2.1	2.2	6%	4%	3.2%	3.5%	11136.1	11799.0	727.3	834.1	1617.4	1847.2
Entain	726.00	75.64	92.76	9.6	7.8	7.1	6.5	9%	12%	2.8%	3.0%	5602.0	5859.9	934.9	1441.9	1213.0	1291.8
Evolve	22.75	17.65	FALSE	1.3	FALSE	4.3	FALSE	105%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FRD Holdings	15.75																
Fever-Tree Drinks	842.00	28.99	37.75	29.0	22.3	17.6	13.9	4%	5%	2.2%	2.3%	411.5	451.3	35.2	47.5	50.2	63.6
Flutter Entertainment	201.35	12.07	15.76	16.7	12.8	10.6	8.7	6%	8%	0.0%	0.0%	19780.1	21813.4	3522.1	4277.1	4234.2	5062.4
Forterra	176.80	14.50	18.85	12.2	9.4	6.0	4.7	12%	14%	3.8%	5.1%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	469.50	849.11	0.00	0.6	nm	3.7	3.8	4%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	738.00	43.47	48.57	17.0	15.2	8.7	8.3	4%	5%	3.2%	3.5%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	18650.00	547.81	585.95	34.0	31.8	21.1	19.6	3%	3%	2.6%	2.8%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	17.27	1.45	1.58	11.9	10.9	8.5	7.6	8%	8%	2.9%	3.2%	3890.9	4044.9	382.4	417.4	530.1	566.4
Glenveagh Properties	1.93	0.21	0.21	9.2	9.2	10.3	9.4	14%	11%	0.0%	0.0%	1052.9	1045.5	143.0	143.9	146.3	147.2
Grafton Group	929.40	74.93	81.31	12.4	11.4	6.0	5.5	6%	7%	4.3%	4.5%	2634.4	2734.3	168.7	185.4	321.7	343.4
Greencoast Renewables	0.71	0.14	FALSE	5.0	FALSE	14.8	FALSE	20%	FALSE	10.4%	FALSE	215.4	FALSE	187.9	FALSE	187.9	FALSE
Greencore	259.50																
Greggs	1628.00	132.06	141.89	12.3	11.5	5.6	5.0	4%	8%	4.1%	4.4%	2339.9	2545.5	198.8	212.4	383.3	415.3
Hammerson	335.80	22.46	26.19	14.9	12.8	0.9	0.8	11%	18%	7.6%	7.5%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	120.00	0.15	FALSE	9.5	FALSE	5.8	FALSE	12%	FALSE	0.0%	FALSE	107.8	FALSE	12.1	FALSE	24.0	FALSE
Howden Joinery	834.00	50.52	53.31	16.5	15.6	9.3	9.0	5%	5%	3.3%	3.5%	2512.5	2609.6	365.0	376.9	528.4	544.6
IAG	407.60	0.75	0.83	6.3	5.7	2.7	2.4	17%	20%	2.2%	2.3%	34276.4	35566.3	5195.8	5288.9	8071.3	8322.2
Ibstock	134.40	9.48	11.75	14.2	11.4	8.0	7.0	8%	9%	3.6%	4.4%	407.3	437.0	51.8	63.7	88.1	98.6
ICG	6.32	0.47	0.52	13.4	12.2	7.6	6.8	4%	12%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	0.96	0.13	0.15	7.2	6.4	0.7	0.7	3%	3%	5.2%	5.6%	67.6	69.9	92.0	100.6	89.4	98.0
J.D. Wetherspoon	757.00	53.97	61.14	14.0	12.4	7.9	7.6	5%	6%	1.6%	1.6%	2223.5	2329.3	151.2	160.8	264.7	275.1
Je2	1307.00	187.52	199.17	7.0	6.6	1.5	1.3	8%	15%	1.3%	1.4%	7595.5	8223.8	432.0	440.2	770.2	810.0
Kaines Group	1015.00	33.66	38.15	30.2	26.6	18.7	16.3	4%	5%	2.4%	2.5%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	74.39	5.35	5.89	13.9	12.6	10.4	9.4	5%	6%	2.1%	2.3%	7072.9	7358.0	1007.1	1101.6	1309.5	1406.0
Kingsfisher	312.80	22.02	23.73	14.2	13.2	5.8	5.3	6%	10%	4.0%	4.0%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	71.35	4.25	4.81	16.8	14.8	11.6	10.4	5%	5%	0.9%	0.9%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5
Lufthansa	8.79	1.24	1.54	7.0	5.7	6.8	5.9	17%	20%	4.3%	5.3%	41656.1	43551.9	2156.2	2615.4	3554.4	4067.2
Manston's	65.00	9.02	10.21	7.2	6.4	7.4	6.9	13%	13%	0.0%	3.1%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	277.00	31.57	33.42	8.8	8.3	6.0	5.6	6%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	512.50	33.24	46.11	15.4	11.1	12.7	9.2	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8
Mondi	892.40	0.89	1.10	11.5	9.3	6.9	6.3	3%	6%	5.9%	6.3%	7951.4	8356.1	651.6	765.8	1120.7	1233.8
NCC Group	136.60	4.20	4.73	32.5	28.9	10.6	9.9	3%	3%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Orion Enterprises	4.18	0.54	0.57	7.7	7.3	4.9	4.7	6%	11%	4.3%	4.6%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.79	0.21	0.29	13.5	9.8	0.7	0.6			2.5%	4.3%	698.1	766.6	171.7	221.2		
Persimmon	1378.00	104.31	122.04	13.2	11.3	1.1	1.1	4%	7%	2.9%	3.1%	3758.4	4062.8	489.6	568.8	514.9	597.1
Playtech	272.00	0.20	0.28	15.7	11.2	0.5	0.5	4%	6%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	98.00	10.62	13.56	9.2	7.2	4.7	3.9	5%	11%	3.3%	4.4%	852.6	919.9	72.4	90.4	128.2	148.8
Ryanair	28.54	2.09	2.35	13.6	12.2	7.7	6.6	9%	9%	1.4%	1.6%	15461.8	16210.6	2452.8	2669.4	3770.0	4037.0
Smurfit Westrock	42.33	2.84	3.88	14.9	10.9	6.6	5.7	6%	8%	3.7%	4.6%	32397.6	34040.7	2587.4	3228.4	5312.1	5959.1
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																	