

Goodbody Market Commentary Metrics



16 July 2026																		
Company	Price 1c	EPS 2026	2027	PE 2026	2027	EV/EBITDA 2026	2027	FCF Yield 2026	2027	Div. Yield 2026	2027	Sales 2026	2027	Op Profit 2026	2027	EBITDA 2026	2027	
AIB Group	10.51	0.85	0.93	12.4	11.3	1.6	1.5			5.1%	5.6%	4586.0	4739.1	2235.3	2331.2			
Air France-KLM	13.08	3.90	8.34	3.4	1.6	3.8	2.9	53%	88%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2	
Applied Nutrition	335.00	11.97	13.20	28.0	25.4	19.8	17.1	1%	2%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2	
BAM European Value Ret	193.00	22.22	22.93	10.2	8.4	6.5	5.5	12%	10%	4.2%	5.7%	5775.0	5999.3	359.0	371.6	458.0	470.3	
Bank of Ireland	17.81	1.49	1.81	12.0	9.8	1.3	1.2			4.5%	5.3%	4260.6	4526.2	1859.7	2061.6			
Barratt Redrow	290.10	29.61	24.94	9.8	11.6	0.5	0.5	9%	7%	5.7%	0.3%	6074.1	6319.0	588.5	474.5	604.8	492.8	
Beauty Tech Group	355.00	24.23	27.79	14.7	12.8	7.2	5.8	8%	10%	0.0%	0.0%	170.9	190.1	32.8	37.4	45.4	50.9	
Bellway	1956.00	182.79	156.47	10.7	12.5	0.6	0.6	3%	13%	3.8%	4.7%	3089.5	3137.6	323.4	271.9	326.4	275.0	
Berkeley Group	3444.00	334.63	290.34	10.3	11.9	0.9	0.9	4%	7%	3.5%	1.9%	2258.6	2014.5	441.3	375.1	425.6	358.4	
Breedon Group	304.20	29.54	33.09	10.3	9.2	5.8	5.2	10%	11%	5.2%	5.4%	1792.6	1869.8	142.0	154.8	282.1	299.4	
Bvies Technology	425.60	22.47	24.51	18.9	17.4	13.3	11.6	6%	6%	6.4%	7.1%	224.8	243.9	63.7	71.2	65.5	73.2	
C & C Group	97.60	0.10	0.10	16.6	11.5	9.1	7.5	0%	6%	3.4%	5.0%	1569.8	1497.8	70.5	71.2	104.3	105.0	
Cairn Homes	2.47	0.23	0.25	10.8	9.7	7.6	7.1	4%	8%	4.7%	5.1%	1065.6	1204.2	181.7	200.5	183.8	203.1	
Coca-Cola HBC	4904.00	2.93	3.16	19.7	18.3	11.7	10.8	4%	4%	2.2%	2.4%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2	
Compass Group	31.54	1.48	1.63	21.4	19.4	11.8	10.9	4%	4%	2.3%	2.6%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9	
Cranwick	5550.00	301.74	322.02	17.0	17.2	8.9	8.5	3%	3%	2.2%	2.1%	2982.5	3120.9	232.8	250.6	336.4	358.6	
CRH	103.96	585.55	660.57	17.8	15.7	10.2	9.4	10%	11%	1.5%	1.6%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4	
DCC	6305.00	437.42	511.23	11.0	12.3	6.3	7.4	12%	9%	4.5%	3.6%	15441.9	16336.2	494.4	563.5	778.3	807.0	
Devolver Digital	17.50	0.18	0.67	134.3	35.5	5.7	4.1	9%	11%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8	
Diageo	1531.50	1.59	1.56	13.0	13.3	11.3	11.1	7%	6%	2.7%	2.8%	19670.7	18889.7	5723.5	5422.8	6298.0	5955.5	
Dole	14.04	133.14	142.18	10.5	9.9	4.6	4.2	10%	13%	2.4%	2.5%	9794.4	9945.2	280.4	290.0	404.0	415.9	
easyJet	674.80	10.49	28.37	64.3	23.8	5.2	4.6	nm	nm	2.3%	2.5%	10701.0	11641.6	72.6	330.0	995.0	1349.6	
Entain	574.00	60.21	71.83	9.5	8.0	6.6	6.1	10%	12%	3.6%	3.8%	5574.3	5794.4	869.4	980.2	1162.3	1237.4	
Evolve	45.75	17.65	FALSE	2.6	FALSE	4.5	FALSE	52%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE	
FBD Holdings	17.00	1.47	1.57	11.5	10.8	1.3	1.3											
Fever-Tree Drinks	798.50	29.14	39.37	27.4	20.3	16.5	12.6	4%	6%	2.3%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7	
Flutter Entertainment	113.50	5.91	9.45	19.2	12.0	10.7	7.8	4%	7%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5	
Forterra	136.40	11.51	13.18	11.8	10.3	6.4	5.6	14%	13%	5.2%	6.0%	390.7	420.3	38.1	42.0	57.6	63.0	
Frontier Developments	425.00	849.11	0.00	0.5	nm	3.3	3.4	5%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3	
Fuller, Smith & Turner	738.00	47.18	52.27	13.3	14.1	7.3	8.1	7%	6%	3.4%	3.1%	397.8	413.3	40.8	48.3	74.6	77.7	
Games Workshop Group	20500.00	547.81	585.95	37.4	35.0	23.2	21.5	3%	3%	2.4%	2.6%	625.0	671.8	238.5	254.4	283.9	305.1	
Glanbia	26.58	1.50	1.63	17.7	16.3	12.9	11.7	5%	5%	1.8%	2.0%	4106.8	4290.4	409.8	442.8	535.0	568.8	
Glenveagh Properties	2.44	0.21	0.23	11.5	10.6	13.2	11.8	13%	9%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9	
Grafton Group	912.00	76.25	86.75	12.0	10.5	5.8	5.2	8%	7%	4.2%	4.3%	2705.7	2897.1	169.5	189.5	322.5	347.5	
Greencoast Renewables	0.76	0.05	FALSE	14.9	FALSE	20.7	FALSE	18%	FALSE	9.1%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE	
Greencore	211.00	18.43	23.22	11.4	9.1	8.0	5.8	9%	11%	1.4%	2.2%	3346.8	4085.5	178.1	240.0	326.0	428.5	
Greggs	1571.00	122.02	122.78	12.9	12.8	5.4	5.1	4%	6%	4.4%	4.4%	2279.9	2406.4	189.7	191.2	372.4	390.2	
Hammerson	371.40	22.65	24.70	16.4	15.0	0.9	0.9	7%	8%	4.8%	5.1%	215.9	232.2	177.7	192.3	177.7	192.2	
Hotelworld Group	106.50	0.13	0.18	9.8	7.1	6.3	4.4	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9	
Joinery Joinery	795.00	52.18	56.75	15.2	14.0	8.9	8.2	6%	6%	2.9%	3.0%	2576.4	2737.9	390.3	426.0	553.5	596.1	
JAG	454.40	0.55	0.72	9.8	7.4	4.5	4.0	7%	8%	1.9%	2.1%	34427.4	35954.7	4086.6	4830.7	6487.1	7396.0	
Ibstock	96.85	5.69	7.33	17.0	13.2	8.0	7.0	5%	8%	3.0%	3.8%	390.5	420.2	33.1	41.6	67.8	75.3	
ICG	6.58	0.49	0.54	13.5	12.2	7.7	7.0	4%	12%	2.5%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1	
IRIS REIT	1.11	0.13	0.15	8.7	7.5	0.8	0.8	2%	2%	5.2%	5.1%	67.6	70.0	90.2	101.6	87.6	99.1	
J D Wetherspoon	225.50	44.32	53.00	16.4	13.7	8.0	7.6	6%	7%	1.7%	1.7%	2226.2	2326.6	128.8	139.2	243.9	255.0	
Je2	1503.00	190.52	113.44	7.9	13.2	1.2	2.4	20%	nm	1.2%	1.2%	7618.1	8026.6	437.5	226.8	777.1	618.5	
Kaines Group	807.50	33.13	43.31	24.4	18.6	15.3	11.4	7%	8%	3.0%	3.1%	430.3	499.9	61.9	53.8	70.8		
Kerry Group	82.85	5.09	5.66	16.3	14.6	12.3	11.1	5%	5%	1.9%	2.0%	6830.3	7117.6	943.0	1030.3	1247.3	1336.4	
Kingsfisher	285.30	23.42	25.14	12.1	11.3	5.3	5.2	10%	10%	4.4%	4.3%	12945.0	13264.7	651.0	686.5	1327.0	1328.3	
Kingspan	78.05	4.14	4.52	18.8	17.3	12.1	11.0	4%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6	
Lufthansa	9.18	1.09	1.27	8.4	7.3	7.9	7.3	17%	15%	3.6%	4.1%	42361.2	42819.1	1828.5	2237.6	3208.2	3539.7	
Manston's	55.90	8.78	9.99	6.4	5.6	7.2	6.8	15%	14%	0.0%	3.6%	990.3	916.6	164.6	170.4	210.0	215.8	
Mitchells & Butlers	265.00	31.43	33.14	8.4	8.0	6.0	5.6	5%	6%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3	
Molten Ventures	613.50	59.68	42.69	10.3	14.4	7.9	11.2	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9	
Mondi	710.80	0.45	0.72	18.8	11.6	7.6	6.3	3%	4%	3.0%	4.3%	8180.1	8523.7	399.5	578.5	917.9	1092.9	
NCC Group	143.80	4.20	4.73	34.2	30.4	11.1	10.4	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3	
Orion Enterprises	4.38	0.54	0.55	8.2	7.9	5.6	5.1	nm	12%	4.1%	4.4%	2166.0	2268.3	86.3	87.5	118.2	121.3	
Permanent TSB	2.99	0.23	0.27	13.3	11.0	0.7	0.7			2.3%	4.0%	708.5	762.2	191.4	219.9			
Persimmon	1093.00	94.20	101.01	11.6	10.8	0.9	0.9	nm	6%	3.7%	3.9%	3905.9	4149.7	463.6	495.1	487.7	522.3	
Playtech	388.40	0.22	0.29	20.5	15.6	0.7	0.7	3%	5%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2	
Rank Group	95.70	9.81	10.33	9.8	9.3	4.9	4.5	4%	8%	3.1%	3.5%	852.6	919.9	67.6	71.2	123.4	129.6	
Ryanair	26.91	2.12	1.91	11.9	14.1	6.5	7.5	6%	5%	1.7%	1.7%	15544.3	16056.6	2459.2	2214.7	3832.6	3636.6	
Smurfit Westrock	43.59	2.17	2.83	20.1	15.4	7.0	6.4	7%	7%	4.2%	4.5%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8	
SSP Group	185.20	13.90	16.67	13.3	11.1	6.7	6.3	5%	6%	2.7%	3.1%	3825.4	3979.6	297.7	330.3	635.0	677.9	
Tate & Lyle	558.50	40.50	36.60	11.2	15.3	7.4	8.6	8%	7%	4.4%	3.5%	2006.0	2005.1	287.0	267.5	415.0	400.7	
Taylor Wimpey	82.42	5.27	6.09	15.6	13.5	0.7	0.7	2%	14%	7.3%	8.5%	3767.5	3993.3	287.3	325.9	293.6	333.4	
Everplay Group	233.00	27.01	29.27	8.6	8.0	3.1	2.6	8%	9%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3	
Travis Perkins	552.50	60.01	FALSE	9.2	FALSE	5.1	FALSE	8%	FALSE	5.1%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE	
Trustpilot Group	290.80	0.04	0.06	98.0	70.0	33.9	24.0	2%	3%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9	
Uniphar	4.58	0.26	0.28	17.6	16.4	10.1	7.2	nm	9%	0.4%	0.4%	3210.0	3357.8	107.1	115.0	147.7	165.8	
Vistry Group	274.20	43.09	49.03	6.4	5.6	2.3	1.6	40%	27%	0.0%	0.0%	3784.1	3942.4	276.8	290.5	348.2	397.2	
WH Smith	404.20	39.76	37.															