

Goodbody Market Commentary Metrics



16 March 2026																		
Company	Price Ic	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	8.95	0.81	0.90	11.0	10.0	1.3	1.2			4.9%	5.9%	4569.1	4708.1	2193.7	2275.6			
Air France-KLM	9.57	5.98	7.52	1.6	1.3	3.1	2.8	93%	121%	0.0%	0.0%	34552.6	36037.2	2206.4	2647.0	5404.1	6076.3	
Applied Nutrition	225.00	11.41	12.82	19.7	17.6	13.4	11.6	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0	
B&M European Value Retn	179.00	21.43	22.68	8.4	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	15.57	1.58	1.83	9.9	8.5	1.1	1.0			4.4%	4.8%	4200.8	4421.8	1813.1	2015.0			
Barratt Redrow	289.00	29.14	35.88	9.9	8.1	0.5	0.5	nm	13%	5.9%	7.1%	5805.3	6417.2	609.3	726.2	613.7	727.7	
Bellway	2284.00	188.09	228.21	12.1	10.0	0.7	0.7	14%	9%	3.3%	4.0%	3003.0	3216.2	332.4	388.1	335.4	388.7	
Berkeley Group	3700.00	342.80	354.08	10.8	10.4	1.0	0.9	4%	12%	3.3%	1.7%	2270.4	2331.6	452.2	459.2	441.0	447.0	
Breedon Group	337.60	29.89	35.36	11.3	9.5	5.9	5.3	8%	9%	4.7%	5.0%	1763.2	1848.1	159.6	178.8	282.8	306.8	
Bvies Technology	305.40	22.47	24.51	13.6	12.5	8.9	7.7	8%	8%	9.0%	9.5%	224.8	243.9	63.7	71.2	65.5	73.2	
C & C Group	111.80	0.11	0.11	12.3	11.9	7.6	7.8	5%	6%	4.9%	4.5%	1586.8	1525.6	71.8	71.8	107.4	107.4	
Cairn Homes	2.28	0.23	0.25	10.1	9.1	7.2	6.7	11%	9%	4.4%	4.8%	1045.0	1126.6	177.7	190.4	182.6	196.0	
Coca-Cola HBC	4548.00	2.92	3.14	18.0	16.8	10.9	10.1	4%	4%	2.5%	2.6%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6	
Compass Group	2271.00	1.46	1.58	20.6	19.0	11.7	11.0	4%	4%	2.4%	2.1%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5	
Cranwick	5290.00	297.22	315.87	17.8	16.7	8.9	8.4	3%	3%	2.0%	2.5%	2994.5	3175.4	227.9	240.1	325.1	344.0	
CBH	99.82	583.63	654.68	17.1	15.2	10.0	9.2	10%	11%	1.6%	1.6%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6	
DCC	4712.00	421.97	505.84	11.2	9.3	6.8	6.2	12%	12%	4.6%	4.8%	14964.1	15168.2	521.6	558.4	788.0	829.2	
Devolver Digital	24.30	0.18	0.67	183.2	48.4	9.9	7.1	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8	
Diageo	1467.50	1.59	1.59	12.2	12.2	11.0	10.8	7%	6%	2.8%	3.4%	19668.2	19214.0	5720.2	5573.1	6294.6	6098.5	
Dole	14.35	148.96	158.44	9.6	9.1	4.6	4.3	10%	11%	2.6%	2.8%	9311.8	9501.3	298.6	309.3	408.1	418.9	
easyJet	369.40	53.51	60.02	6.9	6.2	1.9	2.0	3%	1%	4.2%	4.6%	11134.7	11814.8	540.1	649.6	1415.8	1658.9	
Entain	547.60	64.59	77.21	8.5	7.1	6.7	6.4	11%	13%	3.8%	4.0%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7	
Evoke	28.10	17.65	FALSE	1.6	FALSE	4.3	FALSE	85%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE	
FRD Holdings	16.65																	
Fever-Tree Drinks	830.00	29.23	39.36	28.4	21.1	17.3	13.3	4%	5%	2.3%	2.4%	405.4	444.5	35.8	50.5	50.1	65.1	
Flutter Entertainment	109.11	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	159.40	14.50	18.85	11.0	8.5	5.5	4.3	13%	16%	4.3%	5.8%	413.7	448.9	49.9	62.1	74.3	87.3	
Frontier Developments	372.50	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	678.00	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	17260.00	547.81	585.95	31.5	29.5	19.5	18.1	3%	3%	2.8%	3.0%	625.0	671.8	238.5	254.4	283.9	305.1	
Glanbia	20.16	1.47	1.60	13.7	12.6	10.2	9.3	6%	7%	2.8%	3.0%	3962.9	4096.6	410.1	431.8	525.8	558.4	
Glenveagh Properties	2.05	0.21	0.22	9.7	9.3	11.1	10.2	13%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6	
Grafton Group	903.20	74.77	80.43	12.1	11.2	5.9	5.4	7%	7%	2.6%	4.7%	2623.2	2824.0	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	259.50	16.21	23.18	16.0	11.2	9.0	6.4	5%	9%	1.9%	2.7%	3504.5	4372.9	224.8	318.0	330.1	447.2	
Greggs	1649.00	122.02	122.78	13.5	13.4	5.6	5.3	4%	6%	4.2%	4.2%	2279.9	2406.4	189.7	191.2	372.4	390.2	
Hammerston	315.60	22.46	26.19	14.0	12.1	0.8	0.8	12%	19%	8.0%	8.0%	215.0	242.6	178.0	203.8	177.0	201.8	
Hostelworld Group	98.40	0.13	0.18	8.9	6.4	5.7	3.8	13%	21%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9	
Howden Joinery	837.50	50.27	53.10	16.7	15.8	9.4	9.0	5%	5%	3.3%	3.5%	2495.9	2592.7	363.2	375.5	526.6	543.1	
IAG	353.70	0.68	0.78	6.0	5.3	3.2	3.1	13%	11%	2.5%	2.7%	34336.2	35550.4	4925.0	5122.7	7271.1	7737.9	
Ibstock	102.40	6.26	7.53	16.4	13.6	7.8	7.1	5%	8%	3.1%	3.7%	399.2	429.6	36.3	42.9	71.8	77.3	
ICG	6.40	0.49	0.54	13.1	11.9	7.6	6.8	4%	13%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1	
IRIS REIT	1.01	0.14	0.15	7.4	6.6	0.7	0.7	3%	3%	5.2%	5.5%	67.6	69.5	93.9	102.4	90.4	98.9	
J.D. Wetherspoon	652.00	48.97	53.22	13.2	12.3	7.4	7.2	6%	6%	1.8%	1.8%	2243.1	2356.2	141.1	146.1	256.5	262.2	
Jet2	1096.00	190.10	189.04	5.8	5.8	0.6	0.6	10%	14%	1.6%	1.6%	7605.5	8182.1	439.5	414.8	777.4	783.6	
Kainos Group	786.00	32.66	38.15	23.4	20.6	14.0	12.1	5%	7%	3.1%	3.2%	395.6	413.9	51.9	58.9	59.8	67.8	
Kerry Group	69.60	5.01	5.52	13.9	12.6	10.7	9.8	6%	6%	2.2%	2.4%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8	
Kingfisher	308.60	22.02	23.73	14.9	13.0	5.8	5.3	6%	10%	4.0%	4.0%	12956.6	13317.9	658.7	673.6	1328.9	1359.4	
Kingspan	72.95	4.18	4.62	17.4	15.8	11.7	10.7	5%	5%	0.8%	0.9%	8994.3	10482.7	992.9	1071.6	1342.9	1438.6	
Lufthansa	7.61	1.14	1.46	6.7	5.2	7.7	6.4	4%	18%	23%	4.5%	41422.2	43345.4	1903.2	2543.7	3086.8	3746.1	
Manston's	53.90	9.02	10.21	6.0	5.3	7.1	6.6	16%	16%	0.0%	3.7%	908.6	930.0	166.0	174.5	211.6	220.0	
Mitchells & Butlers	272.50	31.57	33.42	8.6	8.2	6.0	5.6	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1	
Molten Ventures	458.40	33.24	46.11	13.8	9.9	11.5	8.3	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8	
Mondi	818.60	0.53	0.94	17.9	10.1	7.8	6.1	3%	3%	3.1%	5.0%	8105.0	8518.2	447.6	703.3	961.2	1217.3	
NCC Group	126.60	4.20	4.73	30.1	26.8	9.9	9.2	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3	
Origin Enterprises	4.24	0.54	0.57	7.8	7.4	5.0	4.8	6%	11%	4.3%	4.5%	2129.2	2173.2	86.3	89.1	120.8	125.4	
Permanent TSB	3.04	0.21	0.29	14.7	10.6	1.7	0.7			2.3%	3.9%	698.1	766.6	171.7	221.2			
Persimmon	1191.50	103.14	116.00	11.6	10.3	1.0	0.9	4%	8%	3.4%	3.6%	3861.4	4154.5	494.9	548.6	520.6	577.3	
Playtech	352.50	0.20	0.28	20.4	14.6	0.7	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6	
Rank Group	92.00	9.81	10.33	9.4	8.9	4.7	4.4	4%	4%	3.2%	3.6%	852.6	919.9	67.6	71.2	123.4	129.6	
Ryanair	25.61	2.08	2.18	12.3	11.7	7.0	6.5	9%	7%	1.6%	1.8%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1	
Smurfit Westrock	39.91	2.39	3.21	16.7	12.4	6.4	5.8	8%	9%	4.6%	4.9%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7	
SSP Group	178.10	13.90	16.80	12.8	10.6	6.5	6.2	6%	6%	2.8%	3.3%	3815.7	4005.7	304.0	331.4	650.8	681.4	
Tate & Lyle	355.60	41.43	45.31	8.6	7.8	7.1	6.6	6%	12%	5.7%	6.0%	2037.7	2077.5	290.8	304.2	421.3	434.3	
Taylor Wimpey	94.68	7.69	9.29	12.3	10.2	0.8	0.8	6%	8%	10.6%	11.1%	3941.4	4240.8	413.6	494.0	420.5	502.0	
Everplay Group	293.00	28.01	29.78	10.5	9.8	4.0	3.6	7%	7%	0.0%	0.0%	181.2	186.9	38.9	42.3	72.2	72.3	
Travis Perkins	583.00	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	176.10	0.04	0.06	58.3	41.6	19.6	13.6	4%	6%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9	
Unigipar	3.98	0.24	0.27	16.3	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	413.10	22.97	31.92	18.0	12.9	3.0	2.6	26%	8%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1	
WH Smith	551.00	56.72	61.98	9.7	8.9	8.3	7.8	1%	7%	4.2%	4.6%	1615.2	1697.8	142.5	152.2	196.6	208.3	
Whitbread	2354.00																	
Wickes Group	215.00	21.84	26.24	9.8	8.2	5.0	4.4	7%	10%	5.6%	5.6%	1710.3	1779.7	81.7	93.0	206.0	222.8	
Wizz Air	920.00	-0.54	-1.95	nm	nm</													