

Goodbody Market Commentary Metrics



17 April 2026																			
Company	Price 1c	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	9.75	0.84	0.92	11.6	10.6	1.4	1.4	5.5%	6.1%	4566.0	4699.2	2215.3	2291.2						
Air France-KLM	9.80	3.93	5.19	2.5	1.9	3.6	3.3	73%	94%	0.0%	0.0%	34741.0	36232.6	1580.8	1934.8	4779.8	5366.7		
Applied Nutrition	215.50	11.41	12.82	18.9	16.8	12.8	11.1	2%	2%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0		
B&M European Value Retn	173.80	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	16.87	1.47	1.78	11.5	9.5	1.2	1.1	4.7%	5.6%	4238.5	4481.1	1837.5	2016.4						
Barratt Redrow	268.30	29.14	35.88	9.2	7.5	0.5	0.4	nm	14%	6.3%	7.6%	5805.3	6417.2	609.3	726.2	613.7	727.7		
Beauty Tech Group	305.00	21.04	24.57	14.5	12.4	6.8	5.4	8%	11%	160.8	180.9	28.2	32.8	40.5	46.0				
Bellway	1973.00	183.78	213.85	10.7	9.2	0.6	0.6	4%	14%	3.8%	4.7%	3049.1	3233.9	325.0	364.3	328.1	367.3		
Berkeley Group	3426.00	342.80	354.08	10.0	9.7	0.9	0.8	5%	5%	2270.4	2331.6	452.2	459.2	441.0	447.0				
Breedon Group	316.40	29.89	35.36	10.6	8.9	5.6	5.0	9%	9%	5.1%	5.3%	1763.2	1848.1	159.6	178.8	282.8	306.8		
Bvies Technology	311.40	22.47	24.51	13.9	12.7	9.1	7.9	8%	8%	224.8	243.9	63.7	71.2	65.5	73.2				
C & C Group	123.80	0.11	0.11	13.5	13.1	8.0	8.3	4%	5%	4.5%	4.5%	1586.8	1525.6	71.8	71.8	107.4	107.4		
Cairn Homes	2.21	0.23	0.25	9.7	8.7	6.7	6.4	5%	9%	1065.6	1204.2	181.7	200.5	183.8	203.1				
Coca-Cola HBC	4366.00	2.92	3.14	17.2	16.0	10.4	9.6	4%	4%	2.6%	2.8%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5		
Compass Group	27.41	1.46	1.58	18.8	17.3	10.8	10.1	4%	5%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5				
Cranwick	5310.00	297.22	315.87	17.9	16.8	8.9	8.4	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0		
CRH	114.36	583.63	654.68	19.6	17.5	11.1	10.3	9%	10%	1.4%	1.4%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6		
DCC	5215.00	421.97	505.84	12.4	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	22.00	0.18	0.67	169.4	44.7	8.7	6.3	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8		
Diageo	1472.60	1.59	1.61	12.5	12.3	11.1	10.6	7%	7%	2.8%	3.3%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2		
Dole	14.98	135.26	144.02	11.1	10.4	4.9	4.5	11%	12%	9488.2	9634.5	284.2	293.4	407.7	419.3				
easyJet	371.60	53.51	60.02	6.9	6.2	1.9	2.1	3%	1%	4.2%	4.6%	11134.7	11814.8	540.1	649.6	1415.8	1658.9		
Entain	620.20	60.21	71.83	10.3	8.6	6.9	6.3	9%	11%	5574.3	5794.4	869.4	980.2	1162.3	1237.4				
Evoke	35.60	17.65	FALSE	2.0	FALSE	4.4	FALSE	67%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE		
FBD Holdings	17.30																		
Fever-Tree Drinks	831.00	29.14	39.37	28.5	21.1	17.3	13.2	4%	6%	2.2%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7		
Flutter Entertainment	109.02	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	164.40	13.41	15.15	12.3	10.9	6.6	5.9	13%	11%	5.1%	5.7%	403.4	434.0	43.6	47.6	63.8	69.3		
Frontier Developments	85.00	849.11	0.00	0.5	nm	3.1	3.2	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3		
Fuller, Smith & Turner	680.00	43.47	48.57	15.6	14.0	8.2	7.8	4%	5%	3.5%	3.7%	396.2	413.5	43.2	47.6	73.3	76.9		
Games Workshop Group	19385.00	547.81	585.95	35.4	33.1	21.9	20.4	3%	3%	2.5%	2.7%	625.0	671.8	238.5	254.4	289.9	305.1		
Glanbia	19.89	1.47	1.60	13.5	12.5	10.1	9.2	6%	7%	2.8%	3.1%	3952.9	4096.6	400.1	431.8	525.8	558.4		
Glenveagh Properties	2.00	0.21	0.22	9.6	8.9	10.7	9.4	16%	11%	1074.4	1132.6	141.5	149.0	145.3	152.9				
Grafton Group	934.80	74.77	80.43	12.5	11.6	6.1	5.6	6%	7%	4.3%	4.5%	2623.2	2724.0	168.3	183.3	321.3	341.3		
Greencoast Renewables	0.74	0.05	FALSE	14.4	FALSE	20.4	FALSE	18%	FALSE	9.3%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE		
Greencore	251.20	16.21	23.18	15.5	10.8	8.8	6.3	5%	9%	1.9%	2.8%	3504.5	4372.9	224.8	318.0	330.1	447.2		
Grosgos	1628.00	122.02	122.78	13.3	13.3	5.6	5.3	4%	4%	6.2%	4.2%	2279.9	2406.4	189.7	191.2	372.4	390.2		
Hammerson	330.80	22.65	24.70	14.6	13.4	0.8	0.8	8%	9%	5.3%	5.7%	215.9	232.2	177.7	192.3	177.7	192.2		
Hostelworld Group	113.00	0.13	0.18	10.1	7.3	6.5	4.5	12%	18%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9		
Howden Joinery	835.00	51.39	57.32	16.2	14.6	9.1	8.5	6%	5%	2.8%	2.9%	2501.6	2598.9	372.0	405.0	535.2	571.6		
JAG	386.20	0.68	0.78	6.5	5.7	3.4	3.2	12%	10%	34336.2	35530.4	4925.0	5127.2	7271.1	7273.9				
Ibstock	107.90	6.26	7.53	17.2	14.3	8.1	7.4	5%	8%	2.9%	3.5%	399.2	429.6	36.3	42.9	71.8	77.3		
ICG	6.20	0.49	0.54	12.7	11.5	7.4	6.6	4%	13%	2.8%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1		
IRIS REIT	1.07	0.17	0.15	6.5	7.2	0.8	0.7	2%	2%	5.4%	5.4%	67.6	70.0	80.2	101.6	87.6	99.1		
J.D. Wetherspoon	619.50	46.07	51.49	13.5	12.0	7.4	7.2	6%	6%	1.9%	1.9%	2222.8	2319.4	132.0	139.1	247.3	255.0		
Jet2	1166.00	187.33	168.11	6.2	6.9	0.8	1.1	11%	8%	1.5%	1.5%	7602.9	8161.4	431.6	361.9	771.2	777.8		
Kaines Group	851.50	33.66	38.15	25.3	22.3	15.3	13.3	5%	6%	2.9%	2.9%	395.6	413.9	51.9	58.9	59.8	67.8		
Kerry Group	67.35	5.01	5.51	13.4	12.2	10.4	9.4	6%	6%	2.3%	2.3%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4		
Kingsfisher	305.90	22.02	23.73	13.9	12.9	5.7	5.2	6%	10%	4.1%	4.1%	12956.6	13317.9	658.7	673.6	1328.9	1359.4		
Kingspan	78.85	4.18	4.62	18.8	17.1	12.5	11.4	4%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6		
Lufthansa	7.55	1.14	1.46	6.6	5.2	7.7	6.4	18%	23%	4.5%	5.8%	41422.2	43345.4	1903.7	2543.7	3086.8	3746.1		
Marston's	54.20	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	269.00	31.57	33.42	8.5	8.0	5.9	5.5	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1		
Molten Ventures	511.50	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	850.60	0.53	0.94	18.4	10.4	7.9	6.2	3%	5%	3.0%	4.8%	8105.0	8518.2	447.6	703.3	961.2	1217.3		
NCC Group	122.60	4.20	4.73	29.2	25.9	9.6	9.0	4%	5%	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	2.90	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	1148.50	102.91	113.64	11.2	10.1	1.0	0.9	nm	7%	3.5%	3.7%	4017.7	4280.1	502.4	550.8	526.6	578.2		
Playtech	418.20	0.22	0.29	21.5	16.4	0.8	0.7	3%	3%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2		
Rank Group	108.00	9.81	10.33	11.0	10.5	5.3	5.0	4%	7%	2.7%	3.1%	852.6	919.9	67.6	71.2	123.4	129.6		
Ryanair	23.90	2.08	2.18	11.5	11.0	6.5	6.0	9%	8%	1.8%	1.9%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1		
Smurfit Westrock	3051.00	2.39	3.21	17.2	12.9	6.6	5.9	7%	8%	4.4%	4.8%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7		
SSP Group	191.90	13.90	16.80	13.8	11.4	6.6	6.4	5%	6%	3.8%	3.8%	3815.7	4005.7	304.0	331.4	650.8	681.4		
Tate & Lyle	345.70	41.43	45.31	8.3	7.6	7.0	6.5	6%	12%	5.8%	6.1%	2037.7	2077.5	290.8	304.2	421.3	434.0		
Taylor Wimpey	85.16	7.69	9.29	11.1	9.2	0.7	0.7	7%	9%	11.7%	12.3%	3941.4	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	573.00	60.01	FALSE	9.5	FALSE	5.2	FALSE	8%	FALSE	4.9%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE		
Trustpilot Group	247.60	0.04	0.06	83.7	59.8	28.8	20.3	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9		
Uniphar	4.10	0.26	0.28	15.8	14.6	9.2	6.5	nm	10%	0.5%	0.5%	3210.0	3357.8	107.1	115.0	147.7	165.8		
Vistry Group	347.00	22.97	31.92	15.1	10.9	2.5	2.2	32%	9%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1		
WH Smith	623.00	53.43	60.06	11.7	10.4	6.5	5.9	0%	6%	3.5%	3.5%	1607.2	1683.6	136.1	148.7	189.9	204.2		
Whitbread	2498.00																		
Wickes Group	219.00	21.94	26.33	10.0	8.3	5.2	4.6	4%	9%	5.5%	6.4%	1706.5							