

Goodbody Market Commentary Metrics



17 August 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	10.75	0.88	0.96	12.2	11.2	11.2	1.6	1.5			5.0%	5.5%	4660.1	4797.3	2307.3	2381.2	
Air France-KLM	12.20	4.51	5.24	2.7	2.3	3.5	3.4	60%	60%	0.0%	0.0%	35272.5	36004.9	1676.9	1861.4	4879.9	5226.5
Aquatic Nutrition	333.00	11.97	13.26	27.8	25.2	25.2	19.7	17.0	1%	1%	0.0%	0.0%	149.2	186.3	49.2	44.0	41.6
B&M European Value	233.40	22.22	22.93	10.2	10.2	10.2	6.5	6.3	12%	8%	4.2%	4.7%	5775.0	5999.3	359.0	371.6	458.0
Bank of Ireland	18.90	1.63	1.89	11.6	11.0	10.0	1.4	1.3			4.2%	5.0%	4419.1	4631.9	1888.5	2098.4	
Barrett Redrow	326.30	29.61	24.94	11.0	13.1	13.1	0.6	0.5	8%	6%	5.1%	0.3%	6074.1	6319.0	588.5	474.5	604.8
Beauty Tech Group	368.00	24.23	27.79	15.2	13.2	13.2	7.1	6.1	0.0%	8%	10%	0.0%	0.0%	170.8	190.1	32.8	37.4
Bellway	2182.00	182.79	156.47	11.9	13.9	13.9	0.7	0.7	3%	12%	3.4%	4.2%	3089.5	3137.6	323.4	271.9	326.4
Berkeley Group	3622.00	334.63	290.34	10.8	12.5	12.5	1.0	0.9	3%	7%	3.3%	1.8%	2258.6	2014.5	441.3	375.1	425.6
Breedon Group	352.40	29.54	33.09	11.9	10.6	10.6	6.4	5.8	8%	9%	4.5%	4.7%	1792.6	1869.8	142.0	154.8	282.1
Bytes Technology	414.00	22.47	24.51	18.4	16.9	16.9	12.8	11.2	6%	6%	6.6%	7.3%	224.8	243.9	63.7	71.2	65.5
C & C Group	96.60	0.10	0.10	16.6	14.1	14.1	9.4	7.4	70%	8%	3.4%	5.1%	1509.8	1497.8	70.5	71.2	104.4
Carm Home	2.59	0.23	0.25	11.4	10.1	10.1	8.0	7.5	4%	8%	4.4%	4.8%	1095.6	1204.2	183.7	200.5	183.6
Coca-Cola HBC	4606.00	2.93	3.16	18.4	17.1	17.1	10.9	10.1	4%	4%	2.4%	2.6%	12465.9	13221.3	1499.8	1621.7	1937.0
Compass Group	32.06	1.48	1.63	21.7	19.7	19.7	11.9	11.0	4%	4%	2.3%	2.5%	50664.5	54369.0	3739.1	4080.6	5119.0
Cranwick	5260.00	301.24	322.29	17.0	16.3	16.3	8.9	8.1	3%	3%	2.2%	2.2%	2982.5	3129.0	232.8	250.8	316.4
CSH	97.15	578.26	632.33	16.8	15.4	15.4	9.8	9.0	9%	11%	1.6%	1.7%	39995.1	41932.3	5984.2	6484.2	8248.4
DOC	6360.00	437.42	511.23	11.0	12.4	12.4	6.3	7.5	12%	9%	4.5%	3.6%	15441.8	16336.2	494.4	563.5	778.3
Devolver Digital	8.00	0.18	0.67	61.7	16.3	16.3	nm	nm	nm	19%	24%	0.0%	0.0%	109.6	118.6	1.1	4.2
Diageo	1764.00	1.65	1.68	13.9	14.3	14.3	11.3	11.3	8%	6%	2.2%	2.5%	19643.0	18729.9	5901.0	5851.2	6674.0
Dole	13.30	133.14	142.18	10.0	9.4	9.4	4.4	4.0	11%	13%	2.5%	2.7%	9794.4	9945.2	280.4	290.0	404.0
easyJet	671.00	6.17	18.49	89.2	36.8	36.8	5.7	5.1	nm	nm	2.3%	2.5%	10599.5	11688.8	46.1	225.6	919.7
Eden	557.20	56.57	69.91	9.8	8.0	8.0	7.7	7.1	7%	10%	3.7%	3.9%	5196.5	5307.3	675.8	779.2	957.4
Evike	46.25	17.65	FALSE	2.6	FALSE	FALSE	4.5	FALSE	52%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2
FBD Holdings	18.25	1.47	1.57	12.4	11.6	11.6	1.4	1.4									
Fever-Tree Drinks	871.00	29.14	39.37	29.0	22.1	22.1	18.2	13.9	3%	6%	2.1%	2.2%	407.8	447.3	36.6	50.8	50.1
Flutter Entertainment	101.41	5.76	9.36	17.6	10.8	10.8	10.1	7.3	4%	8%	0.0%	0.0%	18338.1	20586.5	2043.9	2887.9	2777.4
Forrester	151.80	11.51	13.18	13.2	11.5	11.5	6.9	6.1	13%	11%	4.7%	5.4%	390.7	420.3	38.1	42.0	57.6
Frontier Development	427.50	849.11	0.00	0.5	nm	nm	3.4	3.5	5%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0
Fulcr. Smith & Turner	750.00	47.18	52.27	13.3	14.3	14.3	7.3	8.2	7%	6%	3.4%	3.1%	397.8	413.3	40.8	48.3	48.4
Games Workshop Grp	19110.00	547.81	585.95	34.9	32.6	32.6	21.6	20.1	3%	3%	2.6%	2.7%	625.0	671.8	238.5	254.4	283.9
Glaxo	26.89	1.61	1.79	16.7	15.3	15.3	12.9	11.9	5%	6%	1.8%	1.9%	4232.7	4441.4	436.7	472.8	553.8
Glenworth Properties	2.48	0.21	0.23	11.7	10.8	10.8	13.5	12.0	13%	9%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3
Grafton Group	1048.00	76.63	84.53	13.7	12.4	12.4	6.5	6.0	7%	6%	3.7%	3.8%	2685.0	2822.0	169.5	182.1	322.5
Greencoat Renewable	0.78	0.05	FALSE	15.3	FALSE	FALSE	21.0	FALSE	17%	FALSE	8.8%	FALSE	30.0	FALSE	106.7	FALSE	96.7
Greenore	264.40	26.07	24.02	13.2	11.0	11.0	8.3	6.2	8%	10%	1.1%	1.8%	3374.4	4091.1	193.2	248.5	336.3
Griggs	1822.00	126.55	127.20	14.4	14.4	14.4	6.1	5.6	5%	6%	3.8%	3.8%	2283.1	2407.4	197.7	198.6	177.1
Hammerson	381.20	23.21	25.54	16.4	14.9	14.9	1.0	1.0	3%	4%	4.6%	5.0%	227.4	247.5	190.0	203.2	188.6
Hostelworld Group	115.00	0.13	0.18	10.5	7.6	7.6	6.8	4.8	11%	18%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7
Howden Joinery	827.00	52.56	56.26	15.7	14.7	14.7	9.3	8.5	5%	6%	2.7%	2.9%	2574.3	2735.6	390.3	423.3	553.2
IAG	443.50	0.61	0.77	8.6	6.8	6.8	4.1	3.7	11%	9%	2.0%	2.2%	33801.5	35574.1	4244.1	4993.0	6855.6
Iluback	89.55	5.68	7.33	15.7	12.2	12.2	7.6	6.7	5%	9%	3.2%	4.1%	380.5	420.2	33.1	41.6	67.8
ICG	7.92																
IRIS REIT	1.11	0.13	0.15	8.6	7.4	7.4	0.8	0.7	2%	2%	5.3%	5.2%	68.1	70.4	90.6	102.0	88.0
J D Wetherspoon	816.00	39.18	48.69	20.8	16.8	16.8	8.5	8.0	11%	7%	1.5%	1.5%	2222.7	2324.0	129.9	131.3	235.9
Jet2	1593.00	190.52	113.44	8.4	14.0	14.0	1.4	2.7	19%	nm	1.1%	1.1%	7618.1	8026.6	437.5	226.8	777.1
Kainos Group	970.00	32.13	43.31	29.3	22.4	22.4	18.8	14.0	6%	7%	2.5%	2.6%	430.3	499.9	45.9	61.9	53.8
Kerry Group	83.95	5.13	5.71	16.4	14.7	14.7	12.3	11.1	5%	5%	1.8%	2.0%	6861.7	7165.4	952.5	1039.5	1165.9
Kingfisher	326.90	23.42	25.14	12.1	13.0	13.0	5.3	5.7	10%	9%	4.4%	3.8%	12945.0	13264.7	651.0	686.5	1327.0
Kingspan	101.40	4.40	5.73	23.1	17.7	17.7	15.1	11.8	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1
Lufthansa	8.13	0.97	1.07	8.4	7.6	7.6	8.1	7.7	21%	10%	3.6%	4.0%	42165.6	42688.5	1942.1	1942.4	2981.2
MasterCard	52.70	8.78	9.98	6.0	5.3	5.3	7.4	6.7	14%	15%	0.0%	3.8%	900.8	916.6	164.6	170.4	210.8
Mitchells & Butlers	287.50	31.43	33.14	9.0	8.6	8.6	6.2	5.8	4%	5%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4
Moten Ventures	687.00	59.68	42.69	11.5	16.1	16.1	4.9	12.6	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5
Mondi	882.00	0.45	0.72	23.1	14.3	14.3	8.6	7.1	2%	3%	2.4%	3.5%	8180.1	8523.7	399.5	578.5	917.9
NCC Group	140.00	4.20	4.73	33.3	29.6	29.6	10.8	10.1	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0
Origin Enterprises	4.60	0.54	0.55	8.6	8.3	8.3	5.8	5.3	nm	12%	3.9%	4.1%	2166.0	2268.3	86.3	87.5	118.2
Permanent TSB	2.94	0.23	0.27	13.0	10.8	10.8	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9	
Periniem	1187.00	94.20	101.01	12.6	11.8	11.8	1.0	1.0	nm	6%	3.4%	3.6%	3905.9	4149.7	461.6	495.1	487.7
Playtech	382.40	0.22	0.29	20.0	15.2	15.2	0.7	0.7	3%	6%	0.0%	0.0%	807.6	867.6	100.2	128.9	204.5
Rank Group	105.40	9.81	10.33	10.7	10.2	10.2	5.2	4.9	4%	7%	2.8%	3.1%	852.4	919.9	67.6	71.2	123.4
Ruanor	24.80	2.12	1.76	14.0	13.9	13.9	6.5	6.8	6%	5%	1.7%	1.9%	15544.3	15973.6	2459.2	2013.4	3839.4
Snowflk Westrock	49.25	2.17	2.83	22.7	17.4	17.4	7.6	7.0	6%	6%	3.7%	4.0%	32582.9	33911.5	2261.2	2690.5	5141.2
SSP Group	212.00	13.90	16.67	15.3	12.7	12.7	7.0	6.6	4%	6%	2.4%	2.8%	3825.4	3979.6	297.7	330.3	635.0
Tate & Lyle	553.50	40.50	36.60	11.2	15.1	15.1	7.4	8.5	8%	7%	4.4%	3.6%	2006.0	2005.1	287.0	287.5	415.0
Taylor Wimpey	85.94	5.27	6.09														