

Goodbody Market Commentary Metrics



19 March 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	9.21	0.81	0.90	11.3	10.3	1.3	1.3			4.7%	5.8%	4569.1	4708.1	2193.7	2275.6			
Air France-KLM	9.70	5.98	7.52	1.6	1.3	3.1	2.8	92%	119%	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			0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0	
B&M European Value Retn	175.50	21.43	22.68	8.2	7.7	5.9	5.7	14%	14%	5.7%	5.8%	5771.2	5996.4	357.3	368.3	454.0	466.9	
Bank of Ireland	15.81	1.58	1.83	10.0	8.6	1.1	1.1			4.4%	4.7%	4200.8	4421.8	1813.1	2015.0			
Barratt Redrow	287.70	29.14	35.88	9.9	8.0	0.5	0.5	nm	13%	5.9%	7.1%	5805.3	6417.2	609.3	726.2	613.7	727.7	
Bellway	2226.00	188.09	228.21	11.8	9.8	0.7	0.7	14%	9%	3.4%	4.2%	3003.0	3216.2	332.4	388.1	335.4	388.7	
Berkeley Group	3710.00	342.80	354.08	10.8	10.5	1.0	0.9	4%	12%	3.3%	1.7%	2270.4	2331.6	452.2	459.2	441.0	447.0	
Breedon Group	331.20	29.89	35.36	11.1	9.4	5.8	5.2	9%	9%	4.8%	5.1%	1763.2	1848.1	159.6	178.8	282.8	306.8	
Bvies Technology	297.40	22.47	24.51	13.2	12.1	8.6	7.4	8%	8%	9.2%	10.1%	224.8	243.9	63.7	71.2	65.5	73.2	
C & C Group	108.60	0.11	0.11	12.0	11.6	7.4	7.7	5%	5%	5.1%	5.1%	1586.8	1525.6	71.8	71.8	107.4	107.4	
Cairn Homes	2.33	0.23	0.25	10.2	9.1	7.1	6.7	5%	9%	4.9%	5.4%	1065.6	1204.2	181.7	200.5	183.8	203.1	
Coca-Cola HBC	4462.00	2.92	3.14	17.7	16.4	10.7	9.9	4%	4%	2.5%	2.7%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6	
Compass Group	2164.00	1.46	1.58	19.8	18.2	11.3	10.6	4%	5%	2.5%	2.8%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5	
Cranwick	5250.00	297.22	315.87	17.7	16.6	8.8	8.3	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0	
CBH	101.91	583.63	654.68	17.5	15.6	10.1	9.4	10%	11%	1.5%	1.6%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6	
DCC	4650.00	421.97	505.84	11.0	9.2	6.7	6.2	12%	13%	4.7%	4.9%	14964.1	15168.2	521.6	559.4	788.0	829.2	
Devolver Digital	24.30	0.18	0.67	184.3	48.7	10.0	7.2	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8	
Diageo	1427.00	1.59	1.59	12.0	12.0	10.9	10.6	7%	7%	2.9%	3.4%	19668.2	19214.0	5720.2	5573.1	6294.6	6098.5	
Dole	14.33	148.96	158.44	9.6	9.0	4.6	4.3	10%	11%	2.6%	2.8%	9311.8	9501.3	298.6	309.3	408.1	418.9	
easyJet	367.20	53.51	60.02	6.9	6.1	1.9	2.0	3%	1%	4.2%	4.6%	11134.7	11814.8	540.1	649.6	1415.8	1658.9	
Entain	550.00	64.59	77.21	8.5	7.1	6.7	6.5	10%	12%	3.8%	3.9%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7	
Evoke	27.45	17.65	FALSE	1.6	FALSE	4.3	FALSE	87%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE	
FBD Holdings	16.35																	
Fever-Tree Drinks	807.00	29.23	39.36	27.6	20.5	16.8	12.9	4%	5%	2.4%	2.5%	405.4	444.5	35.8	50.5	50.1	65.1	
Flutter Entertainment	108.17	9.08	13.27	11.9	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	163.60	13.41	15.15	12.2	10.8	6.6	5.8	13%	11%	5.1%	5.8%	403.4	434.0	43.6	47.6	63.8	69.3	
Frontier Developments	370.00	849.11	0.00	0.4	nm	2.9	2.9	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3	
Fuller, Smith & Turner	674.00	43.47	48.57	15.5	13.9	8.2	7.8	4%	5%	3.5%	4.1%	396.2	413.8	43.2	47.6	73.3	76.9	
Games Workshop Group	17240.00	547.81	585.95	31.5	29.4	19.4	18.1	3%	3%	2.8%	3.0%	625.9	671.8	238.5	254.4	283.9	305.1	
Glanbia	19.91	1.47	1.60	13.5	12.5	10.1	9.2	6%	7%	2.8%	3.1%	3962.9	4096.6	400.1	431.8	525.8	558.4	
Glenveagh Properties	2.03	0.21	0.22	9.6	9.2	11.0	10.1	14%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6	
Grafton Group	910.70	74.77	80.43	12.2	11.3	5.9	5.4	7%	7%	4.4%	4.6%	2623.2	1873.0	168.3	183.3	321.3	341.3	
Greencoat Renewables	0.79	0.05	FALSE	15.5	FALSE	21.0	FALSE	17%	FALSE	8.7%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE	
Greencore	252.50	16.21	23.18	15.6	10.9	8.8	6.3	5%	9%	1.9%	2.8%	3504.5	4372.9	224.8	318.0	330.1	447.2	
Greggs	1592.00	122.02	122.78	13.0	13.0	5.5	5.2	4%	6%	4.3%	4.3%	2279.9	2406.4	189.7	191.2	372.4	390.2	
Hammerston	335.40	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	107.00	0.13	0.18	9.7	7.0	6.2	4.3	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9	
Howden Joinery	826.00	51.39	57.32	16.1	14.4	9.0	8.4	6%	5%	2.8%	2.9%	2501.6	2598.8	372.0	405.0	535.2	571.6	
IAG	357.40	0.68	0.78	6.1	5.3	3.3	3.1	12%	11%	2.5%	2.7%	34336.2	35530.4	4925.0	5122.7	7271.1	7737.9	
Ibstock	104.00	6.26	7.53	16.6	13.8	7.9	7.2	5%	8%	3.1%	3.6%	399.2	429.6	36.3	42.9	71.8	77.3	
ICG	6.56	0.49	0.54	13.4	12.2	7.7	6.9	4%	12%	2.6%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1	
IRIS REIT	1.03	0.14	0.15	7.5	6.7	0.7	0.7	3%	3%	6.7%	5.5%	67.6	67.6	93.9	102.4	90.4	98.9	
J.D. Wetherspoon	637.00	48.97	53.22	13.0	12.0	7.4	7.1	6%	6%	1.9%	1.9%	2243.1	2356.2	141.1	146.1	256.5	262.2	
Jet2	1104.00	190.10	189.04	5.8	5.8	0.7	0.6	10%	14%	1.6%	1.6%	7605.5	8182.1	439.5	414.8	777.4	783.6	
Kainos Group	744.00	32.66	38.15	22.1	19.5	12.1	11.4	6%	7%	2.3%	3.2%	395.6	413.9	51.9	58.9	59.8	67.8	
Kerry Group	66.75	5.01	5.52	13.3	12.1	10.3	9.4	6%	6%	2.3%	2.5%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8	
Kingfisher	311.40	22.02	23.73	14.1	13.1	5.8	5.3	6%	6%	4.0%	4.0%	12956.6	13317.9	658.7	673.6	1328.9	1359.4	
Kingspan	72.05	4.18	4.62	17.2	15.6	11.6	10.6	5%	5%	0.9%	0.9%	8994.3	10482.7	992.9	1071.6	1342.9	1438.6	
Lufthansa	7.89	1.14	1.46	6.9	5.4	7.9	6.5	17%	22%	4.3%	5.6%	41422.2	43345.4	1903.2	2543.7	3086.8	3746.1	
Manston's	51.60	9.02	10.21	5.7	5.1	7.0	6.5	17%	17%	0.0%	3.9%	908.6	930.0	166.0	174.5	211.6	220.0	
Mitchells & Butlers	268.50	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	469.40	33.24	46.11	14.1	10.2	11.7	8.5	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8	
Mondi	826.00	0.53	0.94	18.0	10.2	7.8	6.1	3%	3%	3.0%	4.9%	8105.0	8518.2	447.6	703.3	961.2	1217.3	
NCC Group	120.40	4.20	4.73	28.6	25.5	9.4	8.8	4%	6%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3	
Origin Enterprises	4.40	0.54	0.57	8.1	7.7	5.2	4.9	6%	11%	4.1%	4.3%	2129.2	2173.2	86.3	89.1	120.8	125.4	
Permanent TSB	3.09	0.21	0.29	15.0	10.8	0.7	0.7			2.3%	3.9%	698.1	766.6	171.7	221.2			
Persimmon	1202.00	103.14	116.00	11.7	10.4	1.0	1.0	4%	8%	3.3%	3.5%	3861.4	4154.5	494.9	548.6	520.6	577.3	
Playtech	355.50	0.20	0.28	20.5	14.7	0.7	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6	
Rank Group	92.70	9.81	10.33	9.4	9.0	4.4	4.4	4%	9%	3.2%	3.6%	852.6	919.9	67.6	71.2	123.4	129.6	
Ryanair	25.28	2.08	2.18	12.2	11.6	6.9	6.4	9%	7%	1.7%	1.8%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1	
Smurfit Westrock	39.19	2.39	3.21	16.4	12.2	6.4	5.7	8%	9%	4.7%	5.0%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7	
SSP Group	174.10	13.90	16.80	12.5	10.4	6.4	6.2	6%	6%	2.9%	3.4%	3815.7	4005.7	304.0	331.4	650.8	681.4	
Tate & Lyle	344.40	41.43	45.31	8.3	7.6	7.0	6.5	6%	12%	5.9%	6.2%	2037.7	2077.5	290.8	304.2	421.3	434.3	
Taylor Wimpey	93.52	7.69	9.29	12.2	10.1	0.8	0.8	6%	8%	10.7%	11.2%	3941.4	4240.8	413.6	494.0	420.5	502.0	
Everplay Group	274.00	27.01	29.27	10.1	9.4	3.8	3.3	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3	
Travis Perkins	592.50	60.01	FALSE	9.9	FALSE	5.3	FALSE	8%	FALSE	4.7%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE	
Trustpilot Group	237.40	0.04	0.06	79.1	56.5	27.1	19.1	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9	
Unigipar	3.95	0.24	0.27	16.1	14.9	8.9	6.1	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6	
Vistry Group	381.90	22.97	31.92	16.6	12.0	2.8	2.4	29%	9%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1	
WH Smith	565.00	56.72	61.98	10.0	9.1	8.4	7.9	1%	7%	4.1%	4.5%	1615.2	1697.8	142.5	152.2	196.6	208.3	
Whitbread	2380.00																	
Wickes Group	221.50	21.84	26.24	10.1	8.4	5.0	4.4	7%	10%	5.4%	5.4%	1710.3	1779.7	81.7	93.0	206.0	222.8	
Wizz Air	926.00	-0.54	-1.95	nm														