Goodbody Market Commentary Metrics

19 May 2026																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	lc	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	9.64	0.84	0.92	11.4	10.5	1.4	1.4			5.6%	6.1%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	9.99	3.90	8.34	2.6	1.2	3.6	2.8	70%	116%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2
Applied Nutrition	211.00	11.41	12.82	18.5	16.5	12.5	10.9	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Reta	157.40	21.43	22.68	7.3	6.9	5.5	5.3	15%	15%	6.4%	6.5%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	16.57	1.47	1.78	11.3	9.3	1.2	1.1			4.8%	5.7%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	243.70	29.14	35.88	8.4	6.8	0.4	0.4	nm	16%	7.0%	8.4%	5805.3	6417.2	609.3	726.2	613.7	727.7
Beauty Tech Group	320.00	21.04	24.57	15.2	13.0	7.2	5.7	8%	10%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	1848.00	183.78	213.85	10.1	8.6	0.6	0.6	4%	15%	4.1%	5.0%	3049.1	3233.9	325.0	364.3	328.1	367.3
Berkeley Group	3244.00	342.80	354.08	9.5	9.2	0.9	0.8	5%	13%	3.7%	2.0%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	288.20	30.07	34.93	9.6	8.3	5.3	4.9	9%	9%	5.5%	5.7%	1786.3	1862.1	142.0	158.9	281.4	302.7
Bytes Technology	347.20	22.47	24.51	15.5	14.2	10.4	9.1	7%	7%	7.9%	8.7%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	110.00	0.11	0.11	12.0	11.4	7.5	7.7	5%	6%	5.1%	5.1%	1586.8	1545.6	71.8	72.5	107.4	108.1
Cairn Homes	2.33	0.23	0.25	10.2	9.1	7.2	6.7	5%	9%	4.9%	5.4%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4114.00	2.92	3.14	16.1	15.0	9.8	9.1	4%	5%	2.7%	3.0%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	31.96	1.48	1.63	21.6	19.6	11.9	11.0	4%	4%	2.3%	2.6%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5210.00	297.22	315.87	17.5	16.5	8.8	8.3	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0
CRH	103.39	585.55	660.57	17.7	15.7	10.1	9.3	10%	11%	1.5%	1.6%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4
DCC	5885.00	421.97	505.84	13.9	11.6	8.2	7.6	10%	10%	3.7%	3.9%	14964.1	15168.2	521.6	559.4	788.0	829.2
Devolver Digital	21.50	0.18	0.67	163.4	43.1	8.2	5.9	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1529.50	1.59	1.61	12.9	12.6	11.2	10.7	7%	6%	2.7%	3.2%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	14.24	135.26	144.02	10.5	9.9	4.7	4.3	11%	13%	2.4%	2.5%	9488.2	9634.5	284.2	293.4	407.7	419.3
easyJet	344.20	18.11	33.65	19.0	10.2	2.3	2.5	nm	nm	4.5%	4.9%	10928.0	11793.0	138.2	365.0	1105.1	1393.5
Entain	532.40	60.21	71.83	8.8	7.4	6.4	5.9	11%	13%	3.9%	4.1%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	35.00	17.65	FALSE	2.0	FALSE	4.4	FALSE	68%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.40	1.47	1.57	11.1	10.5	1.3	1.3										
Fever-Tree Drinks	778.00	29.14	39.37	26.7	19.8	16.1	12.3	4%	6%	2.4%	2.5%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	93.15	5.91	9.45	15.8	9.9	9.4	6.9	4%	9%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5
Forterra	150.40	13.41	15.15	11.2	9.9	6.2	5.4	15%	12%	5.5%	6.3%	403.4	434.0	43.6	47.6	63.8	69.3
Frontier Developments	362.00	849.11	0.00	0.4	nm	2.8	2.9	6%	8%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	634.00	43.47	48.57	14.6	13.1	7.9	7.5	4%	6%	3.7%	4.0%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	19390.00	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	283.9	305.1
Glanbia	23.73	1.50	1.63	15.8	14.6	11.6	10.5	5%	6%	2.0%	2.2%	4107.8	4242.3	409.9	441.6	535.1	567.7
Glenveagh Properties	2.25	0.21	0.23	10.7	9.8	12.2	10.8	14%	10%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	808.40	76.25	86.75	10.6	9.3	5.2	4.6	9%	8%	4.8%	4.9%	2705.7	2857.1	169.5	189.5	322.5	347.5
Greencoat Renewables	0.77	0.05	FALSE	15.0	FALSE	20.8	FALSE	17%	FALSE	9.0%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	234.60	18.17	22.96	12.9	10.2	8.3	5.9	6%	10%	1.2%	2.0%	3498.9	4334.8	225.8	317.8	331.2	447.1
Greggs	1697.00	122.02	122.78	13.9	13.8	5.8	5.4	4%	6%	4.1%	4.1%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	317.20	22.65	24.70	14.0	12.8	0.8	0.7	8%	10%	5.6%	6.0%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	107.00	0.13	0.18	9.6	6.9	6.2	4.2	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	723.50	51.39	57.32	14.1	12.6	8.0	7.4	7%	6%	3.2%	3.3%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	374.70	0.64	0.74	6.7	5.8	3.5	3.3	12%	10%	2.4%	2.6%	35101.0	36582.9	4648.7	4975.7	6994.8	7540.9
Ibstock	95.70	6.26	7.53	15.3	12.7	7.5	6.8	6%	9%	3.3%	3.9%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.38	0.49	0.54	13.1	11.9	7.5	6.8	4%	13%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.04	0.13	0.15	8.1	7.0	0.7	0.7	2%	2%	5.5%	5.5%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	593.00	46.03	51.49	12.9	11.5	7.3	7.0	6%	7%	2.0%	2.0%	2222.8	2319.4	132.0	139.1	247.3	255.0
Jet2	1074.00	190.52	113.44	5.6	9.5	0.1	1.0	28%	nm	1.6%	1.7%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	814.50	33.13	43.31	24.6	18.8	15.5	11.5	7%	8%	3.0%	3.1%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	72.30	5.01	5.51	14.4	13.1	11.0	10.0	6%	6%	2.1%	2.3%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4
Kingfisher	273.30	23.42	25.12	12.1	10.9	5.3	5.0	10%	10%	4.4%	4.5%	12945.0	13234.4	651.0	685.9	1327.0	1326.8
Kingspan	73.25	4.18	4.62	17.5	15.8	11.7	10.7	5%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	7.69	1.06	1.52	7.2	5.1	7.7	6.0	19%	22%	4.1%	5.9%	42111.9	43620.3	1779.7	2631.1	3065.1	3942.6
Marston's	45.35	9.02	10.21	5.0	4.4	6.8	6.3	19%	19%	0.0%	4.4%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	250.50	31.57	33.42	7.9	7.5	5.7	5.3	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	587.50	33.24	46.11	17.7	12.7	14.5	10.5	1%	3%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8
Mondi	751.00	0.45	0.72	19.3	11.9	7.7	6.4	3%	3%	2.9%	4.2%	8180.1	8523.7	399.5	578.5	917.9	1092.9
NCC Group	137.80	4.20	4.73	32.8	29.1	10.7	10.0	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.78	0.54	0.57	8.8	8.4	5.5	5.3	5%	10%	3.8%	4.0%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.92	0.23	0.27	13.0	10.7	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9		
Persimmon	1046.50	102.91	113.64	10.2	9.2	0.9	0.9	nm	8%	3.8%	4.1%	4017.7	4280.1	502.4	550.8	526.6	578.2
Playtech	359.60	0.22	0.29	18.5	14.0	0.7	0.6	4%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	96.80	9.81	10.33	9.9	9.4	4.9	4.6	4%	8%	3.0%	3.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	22.02	2.12	1.85	11.9	11.9	6.5	6.1	6%	6%	1.7%	2.1%	15544.3	16091.1	2459.2	2148.1	3832.6	3570.1
Smurfit Westrock	2861.00	2.17	2.83	17.6	13.5	6.5	5.9	7%	8%	4.8%	5.1%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	155.00	13.90	16.80	11.2	9.2	6.2	5.9	7%	7%	3.2%	3.8%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	536.00	40.87	43.21	13.1	12.4	7.7	7.4	4%	8%	3.8%	4.0%	2014.2	2013.8	287.5	292.1	417.9	422.2
Taylor Wimpey	77.66	7.69	9.29	10.1	8.4	0.7	0.7	8%	9%	12.9%	13.5%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	273.50	27.01	29.27	10.1	9.3	3.8	3.3	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	510.00	60.01	FALSE	8.5	FALSE	4.8	FALSE	9%	FALSE	5.5%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	240.00	0.04	0.06	80.1	57.2	27.5	19.3	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.32	0.26	0.28	16.6	15.4	9.6	6.8	nm	9%	0.5%	0.5%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	278.00	7.51	30.45	37.0	9.1	3.0	1.8	34%	11%	0.0%	0.0%	4301.4	4532.5	290.8	396.1	356.9	486.0
WH Smith	460.00	48.12	50.21	9.6	9.2	5.7	5.5	nm	4%	0.0%	2.8%	1597.7	1620.9	124.8	129.6	178.3	183.1
Whitbread	2302.00																
Wickes Group	170.80	21.94	26.33	7.8	6.5	4.7	4.1	5%	12%	7.0%	8.2%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	949.50	-0.54	-1.95	nm	nm	9.1	5.9	39%	63%	0.0%	0.0%	5804.3	6899.2	28.2	-118.9	1168.3	1190.9

Closing prices as of: *18/05/2026*