

Goodbody Market Commentary Metrics



November 2025																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	1c	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
AIB Group	8.14	0.80	0.79	10.2	10.3	1.2	1.1			4.9%	5.0%	4428.2	4479.6	2087.0	2104.3		
Air France-KLM	9.26	5.85	5.23	1.6	1.8	3.3	3.2	68%	63%	0.0%	0.0%	32821.1	34235.8	1809.6	2000.2	4764.1	5017.9
Applied Nutrition	168.40	9.12	10.12	18.5	16.6	13.0	11.3	3%	4%	0.0%	0.0%	107.0	121.0	29.8	33.2	30.9	34.3
B&M European Value Ret	156.55	34.42	24.04	11.9	6.5	8.2	5.0	7%	18%	3.7%	6.7%	5571.0	5812.2	527.0	392.9	619.0	490.2
Bank of Ireland	14.89	1.44	1.57	10.3	9.5	1.1	1.1			4.3%	4.6%	4120.3	4181.7	1708.5	1794.1		
Bakkavor Group	225.00																
Barratt Redrow	374.40	35.48	29.14	10.6	12.8	0.7	0.7	nm	6%	4.3%	4.5%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2684.00	172.35	197.69	15.6	13.6	0.9	0.9	4%	8%	2.6%	3.0%	2780.5	2999.9	299.1	337.6	305.2	337.7
Berkeley Group	3846.00	370.16	317.54	11.9	12.1	1.3	1.1	4%	6%	1.6%	3.2%	2486.5	2374.4	514.7	444.0	503.8	435.0
Breedon Group	313.80	30.23	32.81	10.4	9.6	5.9	5.3	5%	10%	4.9%	5.1%	1734.1	1822.8	159.0	173.8	279.9	299.9
Bytes Technology	349.40	22.88	23.50	21.3	14.9	15.8	10.2	4%	7%	7.3%	8.2%	217.1	228.1	66.4	67.0	67.9	68.7
C & C Group	127.60	0.12	0.12	15.9	12.2	8.9	7.6	3%	6%	3.3%	4.5%	1665.5	1652.6	77.2	79.7	112.0	115.3
Cairn Homes	1.90	0.20	0.23	9.4	8.4	5.9	6.1	0%	18%	4.7%	5.3%	946.3	1045.0	162.6	177.7	167.1	182.6
Coca-Cola HBC	3576.00	2.67	2.86	15.2	14.2	9.5	8.8	4%	5%	2.8%	3.1%	11535.2	12191.1	1341.2	1447.1	1749.8	1872.2
Compass Group	2450.00	1.31	1.43	24.6	22.5	14.4	13.5	3%	4%	2.0%	2.2%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
Cranswick	4885.00	273.41	292.01	17.3	16.7	9.2	8.5	3%	3%	2.1%	2.2%	2723.3	2942.6	190.8	220.0	293.2	315.2
CRH	108.87	543.18	585.33	20.0	18.6	11.8	11.0	7%	9%	1.4%	1.4%	37552.4	39902.0	5498.9	6011.0	7624.0	8197.6
DCC	4930.00	401.60	433.35	13.4	11.4	8.1	7.0	8%	12%	3.8%	4.4%	18011.1	14959.5	439.6	521.4	784.0	787.9
Devolver Digital	26.00	-0.12	0.18	nm	194.6	14.0	10.8	7%	6%	0.0%	0.0%	101.3	109.6	-0.8	1.1	3.8	5.7
Diageo	1731.50	1.66	1.70	18.0	13.4	12.1	11.0	6%	6%	3.5%	4.5%	20245.0	20474.4	5897.0	6066.3	7422.0	6673.0
Dole	14.14	129.66	148.86	10.9	9.5	4.9	4.5	4%	10%	2.4%	2.6%	8904.6	9085.1	283.6	298.4	393.1	408.0
easyJet	455.80	69.60	78.55	6.5	5.8	2.1	1.8	19%	11%	3.1%	3.4%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	701.00	59.70	75.64	11.7	9.3	7.4	6.9	6%	10%	2.8%	2.9%	5365.8	5602.0	822.1	934.9	1142.8	1213.0
Evoque	36.70	11.35	17.65	3.2	2.1	5.2	4.4	46%	65%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	14.10	1.66	FALSE	8.5	FALSE	1.2	FALSE			8.9%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	779.00	24.53	28.99	31.8	26.9	18.2	16.1	4%	4%	2.3%	2.4%	372.8	411.5	29.5	35.2	43.5	50.2
Flutter Entertainment	192.82	8.11	12.07	23.8	16.0	13.9	10.2	4%	6%	0.0%	0.0%	16823.2	19780.1	2539.9	3522.1	3145.6	4234.2
Forterra	173.00	13.07	14.50	13.2	11.9	7.4	5.9	7%	12%	3.3%	3.9%	380.9	413.7	41.4	49.9	62.4	74.3
Frontier Developments	522.00	587.49	849.11	0.9	0.6	4.9	4.1	3%	4%	0.0%	0.0%	90.6	96.6	5.7	9.1	38.3	43.0
Fuller, Smith & Turner	636.00	34.22	40.26	19.2	15.8	8.6	8.2	nm	4%	3.0%	3.4%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop Group	16070.00	595.42	547.81	21.1	29.3	13.3	18.1	5%	3%	4.1%	3.1%	617.5	625.0	261.3	238.5	305.9	283.9
Glanbia	16.85	1.33	1.45	12.7	11.7	10.0	9.0	7%	8%	2.7%	2.9%	3871.8	3820.0	353.2	383.8	502.6	532.7
Glanveagh Properties	1.83	0.20	0.21	9.4	8.7	10.8	9.4	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9
Grafton Group	892.80	70.31	75.86	12.7	11.8	6.3	5.8	4%	7%	4.3%	4.5%	2525.1	2640.5	157.0	171.0	306.0	324.0
Greencoast Renewables	0.69	0.14	0.14	4.8	4.8	13.4	14.7	20%	20%	10.2%	10.7%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	238.00																
Greggs	1489.00	129.34	132.76	11.5	11.2	5.5	5.2	nm	4%	4.3%	4.5%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerson	297.20																
Hostelworld Group	127.00	0.11	0.15	12.9	9.9	8.2	6.1	9%	11%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	789.00	46.32	50.52	17.0	15.6	9.3	8.8	5%	5%	3.0%	3.5%	2418.6	2512.5	340.3	365.0	498.8	528.4
JAG	371.30	0.66	0.75	6.4	5.6	2.9	2.5	14%	19%	2.3%	2.4%	33150.3	34276.4	4914.0	5195.8	7533.5	8071.3
Jbstock	124.80	6.24	11.12	20.0	11.2	9.5	6.7	0%	10%	2.8%	4.5%	382.4	426.6	38.1	61.0	72.5	99.0
JCG	5.84	0.40	0.44	14.6	13.3	7.6	7.0	11%	4%	2.8%	2.9%	633.6	664.4	74.1	79.3	143.1	148.3
IREX REIT	0.91	0.06	0.13	15.1	6.8	0.7	0.0	2%	3%	5.1%	5.5%	65.7	67.6	54.7	92.0	52.0	89.4
J D Wetherspoon	624.00	48.06	53.97	13.9	11.6	7.2	7.3	8%	6%	1.8%	1.9%	2127.5	2223.5	146.4	151.2	259.7	264.7
Je2	1302.00	217.83	194.54	6.6	6.7	1.5	1.1	23%	14%	1.1%	1.5%	7173.5	7565.2	446.5	450.6	728.6	782.8
Kaines Group	966.00	30.80	33.66	29.6	28.7	19.9	17.7	5%	4%	2.7%	2.5%	367.2	395.6	41.8	51.9	49.6	59.8
Kerry Group	77.10	4.88	5.41	15.8	14.2	11.9	10.9	5%	5%	1.8%	2.0%	6907.3	7110.7	933.8	1017.4	1236.4	1321.9
Kingsfisher	291.30	20.41	19.97	12.9	14.6	5.5	5.7	10%	8%	4.7%	4.3%	12784.0	12842.4	628.0	608.8	1299.0	1272.8
Kingspan	64.20	3.83	4.15	16.8	15.5	11.4	10.6	5%	5%	0.9%	1.0%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	7.63	1.10	1.24	7.0	6.2	7.1	6.4	17%	19%	4.3%	4.9%	39509.3	41656.1	1939.1	2156.2	3204.5	3554.4
Manston's	46.25	7.80	8.74	5.9	5.3	7.5	7.0	14%	14%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	242.50	28.97	30.05	8.4	8.1	6.1	5.8	8%	6%	0.0%	0.0%	2712.1	2822.2	325.8	330.1	458.5	466.9
Molten Ventures	404.40	-0.43	33.24	nm	12.2	63.1	10.2	8%	1%	0.0%	0.0%	43.6	111.2	10.0	77.7	10.3	77.8
Mondi	828.20	0.70	0.90	13.4	10.4	7.1	6.5	nm	4%	4.9%	6.5%	7553.0	8072.4	550.6	658.6	1047.5	1134.8
NCC Group	142.00	5.53	7.09	25.7	20.0	9.5	8.3	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.68	0.52	0.54	7.1	6.9	6.1	5.7	nm	7%	4.7%	4.9%	2177.5	2256.2	79.6	83.8	111.3	117.1
Permanent TSB	3.19	0.07	0.21	46.2	15.4	0.8	0.8			0.6%	2.2%	649.1	698.1	124.1	171.7		
Persimmon	1227.50	93.59	104.31	13.1	11.8	1.1	1.0	nm	4%	3.3%	3.3%	3523.6	3758.4	444.9	489.6	467.4	514.9
Playtech	233.50	0.14	0.20	19.2	13.2	0.4	0.4	2%	4%	0.0%	0.0%	797.8	831.6	73.9	89.4	175.2	193.7
Rank Group	109.20	8.88	10.62	9.9	10.3	4.7	5.1	7%	5%	2.2%	2.9%	795.4	852.6	63.7	72.4	116.5	128.2
Ryanair	25.70	1.45	2.07	12.5	12.4	6.7	6.9	10%	10%	2.2%	1.6%	13948.5	15392.3	1558.0	2415.2	2772.4	3732.4
Smurfit Westrock	33.91	2.72	2.88	12.5	11.8	6.2	5.8	4%	7%	5.3%	4.7%	31050.4	31816.5	2281.3	2602.6	4982.7	5281.6
SSP Group	138.60	11.51	13.48	12.0	10.3	6.8	6.2	3%	4%	2.9%	3.4%	3644.8	3812.8	260.4	287.3	553.2	633.3