

Goodbody Market Commentary Metrics



20 October 2025																	
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
	1c	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
AIB Group	7.38	0.80	0.79	9.3	9.4	1.1	1.0			5.4%	5.5%	4428.2	4479.6	2087.0	2104.3		
Air France-KLM	11.79	6.15	5.26	1.9	2.2	3.5	3.2	51%	79%	0.0%	0.0%	33123.4	34426.2	1901.7	2009.3	4698.6	4901.8
Applied Nutrition	179.40	9.12	10.12	19.7	17.7	13.9	12.1	3%	4%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3
B&M European Value Retail	217.10	34.42	27.26	11.9	8.0	8.2	5.8	7%	14%	3.7%	6.2%	5571.0	5812.2	527.0	435.5	619.0	532.8
Bank of Ireland	12.99	1.44	1.57	9.0	8.3	1.0	0.9			4.9%	5.3%	4120.3	4181.7	1708.5	1794.1		
Bakkavor Group	216.00																
Barratt Redrow	385.10	35.48	29.14	10.9	13.2	0.7	0.7	nm	6%	4.2%	4.4%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2562.00	172.35	197.69	14.9	13.0	0.8	0.8	4%	9%	2.7%	3.1%	2780.5	2999.9	299.1	337.6	305.2	337.7
Berkeley Group	4002.00	370.16	317.54	11.9	12.6	1.3	1.1	4%	6%	1.6%	3.0%	2486.5	2374.4	514.7	444.0	503.8	435.0
Breedon Group	330.80	30.91	33.50	10.7	9.9	6.0	5.4	5%	10%	4.6%	4.8%	1748.8	1837.9	162.1	176.9	284.3	304.4
Bytes Technology	360.00	22.88	23.50	21.3	15.3	15.8	10.6	4%	7%	7.3%	8.0%	217.1	228.1	66.4	67.0	67.9	68.7
C & C Group	137.60	0.12	0.12	15.9	13.3	8.9	8.1	3%	5%	3.3%	4.1%	1665.5	1652.6	77.2	79.7	112.0	115.3
Cairn Homes	1.90	0.20	0.23	9.3	8.4	5.8	6.0	0%	18%	4.7%	5.3%	946.3	1045.0	162.6	177.7	167.1	182.6
Coca-Cola HBC	3556.00	2.67	2.86	15.3	14.2	9.7	8.9	4%	5%	2.8%	3.1%	11581.4	12241.7	1339.3	1445.6	1749.6	1872.4
Compass Group	2537.00	1.31	1.43	26.0	23.8	15.1	14.2	3%	3%	1.9%	2.1%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
Cranswick	5020.00	273.41	292.01	17.3	17.2	9.2	8.7	3%	3%	2.1%	2.1%	2723.3	2942.6	190.8	220.0	293.2	315.2
CRH	117.46	544.93	605.90	21.6	19.4	12.4	11.7	7%	8%	1.3%	1.3%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5
Dalata Hotel Group	6.42																
DCC	4674.00	401.60	433.35	13.4	10.8	8.1	6.7	8%	12%	3.8%	4.6%	18011.1	14959.5	439.6	521.4	784.0	787.9
Devolver Digital	24.50	0.14	0.70	229.0	46.8	10.3	7.0	8%	7%	0.0%	0.0%	109.6	118.9	0.6	4.4	5.2	9.0
Diageo	1826.50	1.66	1.70	18.0	14.4	12.1	11.5	6%	6%	3.5%	4.2%	20245.0	20474.4	5897.0	6066.3	7422.0	6673.0
Dole	13.20	129.83	141.67	10.2	9.3	4.8	4.3	8%	13%	2.6%	2.7%	8685.2	8802.1	283.7	296.5	393.1	408.0
easyJet	487.90	69.60	78.55	7.0	6.2	2.3	2.0	17%	10%	2.9%	3.2%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	818.60	57.75	73.60	14.2	11.1	8.2	7.6	3%	7%	2.4%	2.5%	5351.6	5594.6	808.2	922.0	1139.2	1212.2
Evoke	43.25	11.35	17.65	3.8	2.5	5.3	4.5	39%	55%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	14.20	1.66	FALSE	8.6	FALSE	1.2	FALSE			8.8%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	871.00	24.15	29.72	36.1	29.3	20.1	17.5	4%	4%	2.0%	2.1%	374.5	412.0	30.9	37.0	44.9	52.0
Flutter Entertainment	251.57	8.04	12.13	31.3	20.7	16.7	12.7	3%	5%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	170.00	13.07	14.50	13.0	11.7	7.3	5.8	7%	13%	3.4%	4.0%	380.9	413.7	41.4	49.9	62.4	74.3
Frontier Developments	423.00	587.49	849.11	0.7	0.5	4.2	3.9	5%	2%	0.0%	0.0%	90.6	96.6	5.7	9.1	36.0	38.4
Fuller, Smith & Turner	600.00	34.22	40.26	19.2	14.9	8.6	7.9	nm	5%	3.0%	3.6%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop Group	14680.00	525.16	561.13	28.0	26.2	17.4	16.2	4%	4%	3.1%	3.3%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	17.06	1.33	1.45	12.9	11.8	10.1	9.1	7%	8%	2.6%	2.9%	3871.8	3820.0	353.2	383.8	502.6	532.7
Glenveagh Properties	1.82	0.20	0.21	9.3	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	911.90	70.31	75.86	13.0	12.0	6.4	5.9	4%	7%	4.2%	4.4%	2525.1	2640.5	157.0	171.0	306.0	324.0
Greencoat Renewables	0.71	0.14	0.14	4.9	4.9	13.5	14.8	20%	20%	10.0%	10.5%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	243.00																
Greggs	1658.00	129.34	132.76	12.8	12.5	6.0	5.6	nm	4%	3.9%	4.0%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerson	297.00																
Hostelworld Group	126.50	0.11	0.15	13.0	10.0	8.3	6.1	9%	11%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	804.50	46.32	50.52	17.4	15.9	9.5	9.0	4%	5%	3.0%	3.4%	2418.6	2512.5	340.3	365.0	498.8	528.4
IAG	391.20	0.66	0.75	6.8	6.0	2.9	2.5	16%	19%	2.7%	3.3%	33522.1	34437.3	4950.0	5227.8	7569.5	8103.3
Ilstock	124.20	6.24	11.12	19.9	11.2	9.5	6.6	0%	11%	2.8%	4.5%	382.4	426.6	38.1	61.0	72.5	99.0
ICG	5.90	0.40	0.44	14.8	13.4	7.7	7.1	11%	4%	2.8%	2.9%	633.6	664.4	74.1	79.3	143.1	148.3
IRES REIT	0.92	0.06	0.13	15.4	6.9	0.7	0.0	2%	3%	5.0%	5.5%	65.7	67.6	54.7	92.0	52.0	89.4
J D Wetherspoon	626.50	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
Jet2	1332.00	217.83	194.54	6.6	6.8	1.5	1.2	23%	14%	1.1%	1.4%	7173.5	7565.2	446.5	450.6	728.6	782.8
Kainos Group	931.50	30.80	33.66	29.6	27.7	19.9	17.0	5%	4%	2.7%	2.6%	367.2	395.6	41.8	51.9	49.6	59.8
Kerry Group	77.45	4.88	5.41	15.9	14.3	12.0	10.9	4%	5%	1.8%	2.0%	6907.3	7110.7	933.8	1017.4	1236.4	1321.9
Kingfisher	303.70	20.41	19.97	12.9	15.2	5.5	5.9	10%	8%	4.7%	4.1%	12784.0	12842.4	628.0	608.8	1299.0	1272.8
Kingspan	68.80	3.83	4.15	18.0	16.6	12.1	11.3	5%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	7.23	1.07	1.22	6.7	5.9	6.9	6.3	18%	20%	4.4%	5.1%	39170.1	41082.1	1900.5	2134.9	3216.4	3527.8
Marston's	42.95	7.80	8.74	5.5	4.9	7.4	6.9	15%	15%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	247.00	28.97	30.05	8.5	8.2	6.1	5.8	8%	6%	0.0%	0.0%	2712.1	2822.2	325.8	330.1	458.5	466.9
Molten Ventures	398.80	-0.43	33.24	nm	12.0	63.1	10.0	8%	1%	0.0%	0.0%	43.6	111.2	10.0	77.7	10.3	77.8
Mondi	825.40	0.70	0.90	13.6	10.5	7.2	6.5	nm	4%	4.9%	6.4%	7553.0	8072.4	550.6	658.6	1047.5	1134.8
NCC Group	143.60	5.53	7.09	26.0	20.3	9.6	8.4	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.75	0.52	0.54	7.3	7.0	6.1	5.8	nm	6%	4.6%	4.8%	2177.5	2256.2	79.6	83.8	111.3	117.1
Permanent TSB	2.29	0.07	0.21	32.2	10.7	0.6	0.5			0.9%	3.1%	650.5	694.0	125.5	172.6		
Persimmon	1173.50	93.59	104.31	12.5	11.3	1.0	1.0	nm	5%	3.4%	3.4%	3523.6	3758.4	444.9	489.6	467.4	514.9
Playtech	336.00	0.14	0.20	27.9	19.3	0.6	0.6	1%	3%	0.0%	0.0%	797.8	831.6	73.9	89.4	175.2	193.7
Rank Group	125.80	8.88	10.62	9.9	11.8	4.7	5.7	7%	4%	2.2%	2.5%	795.4	852.6	63.7	72.4	116.5	128.2
Ryanair	25.15	1.45	2.05	12.5	12.3	6.7	7.1	10%	9%	2.2%	1.7%	13948.5	15245.3	1558.0	2339.5	2772.4	3613.8
Smurfit Westrock	41.38	2.95	3.28	14.0	12.6	6.9	6.1	5%	8%	4.2%	4.4%	31378.3	32808.0	2453.2	2905.7	5120.3	5664.4
SSP Group	159.00	11.51	13.48	13.8	11.8	7.1	6.5	3%	3%	2.5%	3.0%	3644.8	3812.8	260.4	287.3	553.2	633.3
Tate & Lyle	382.60	50.26	38.68	13.1	9.9	10.1	7.4	7%	8%	3.0%	5.3%	1736.4	2039.7	287.6	282.6	380.6	420.7
Taylor Wimpey	103.65	8.00	9.30	13.0	11.1	0.9	0.9	3%	10%	9.0%	9.6%	3767.6	4015.1	428.1	490.5	435.6	497.2
Everplay Group	391.00	26.38	28.01	14.8	14.0	6.4	5.8	4%	5%	0.0%	0.0%	175.9	181.2	35.8	38.9	69.7	72.2
Travis Perkins	605.00	49.14	60.01	12.3	10.1	6.0	5.4	7%	8%	3.8%	4.6%	4697.5	4874.0	161.4	196.2	354.3	391.5
Trustpilot Group	202.40	0.03	0.05	89.3	59.7	34.3	26.1	4%	4%	0.0%	0.0%	249.2	285.1	17.6	25.7	29.6	37.7
Uniphar	3.84	0.22	0.24	17.4	16.2	9.5	8.7	7%	7%	0.5%	0.5%	2890.7	2981.4	97.1	107.0	133.0	143.3
Vistry Group	637.40	38.61	49.00	16.5	13.0	6.1	5.1	8%	9%	0.0%	0.0%	4293.3	4536.5	404.2	442.6	353.4	400.5
WH Smith	642.50	61.56	65.61	10.4	9.8	9.6	9.4	5%	6%	5.3%	4.4%	1530.1	1618.5	139.7	148.4	200.9	200.2
Whitbread	2902.00																
Wickes Group	217.50	17.68	22.15	12.3	9.8	5.6	4.9	4%	8%	5.0%	5.5%	1606.9	1685.2	72.5	82.5	191.4	205.8
Wizz Air	1168.00	1.67	0.03	11.8	387.4	9.6	8.1	25%	30%	0.0%	0.0%	5267.6	6050.6	167.5	191.0	1134.3	

Closing prices as of: 19/10/2025