

Goodbody Market Commentary Metrics



21 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	10.85	0.88	0.96	12.3	11.3	1.6	1.6			5.0%	5.4%	4660.1	4797.3	2307.3	2381.2		
Air France-KLM	11.38	4.51	5.24	2.5	2.2	3.4	3.4	64%	74%	0.0%	0.0%	35272.5	36004.9	1676.9	1861.4	4879.9	5226.5
Aquiline Nutrition	319.00	11.97	13.26	26.6	24.2	18.8	16.3	1%	3%	0.0%	0.0%	149.2	186.3	49.3	44.0	41.6	47.2
B&M European Value	233.80	22.22	22.93	10.2	10.2	6.5	6.3	4.7%	12%	8%		5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	18.86	1.63	1.89	11.6	10.0	1.4	1.3			4.2%	5.0%	4419.1	4631.9	1888.5	2098.4		
Barrett Redrow	309.10	29.61	24.94	10.4	12.4	0.5	0.5	5.3%	8%	6%	5.3%	6074.1	6319.0	588.5	474.5	604.8	492.8
Beauty Tech Group	346.00	24.23	27.79	14.3	12.4	7.0	5.6	8%	10%	0.0%	0.0%	170.8	190.1	32.8	37.4	45.4	50.9
Belway	2112.00	182.79	156.47	11.6	13.5	0.7	0.6	3%	12%	3.6%	4.4%	3089.5	3137.6	323.4	271.9	326.4	275.0
Berkeley Group	3524.00	334.63	290.34	10.5	12.1	1.0	0.9	3%	7%	3.4%	1.8%	2258.6	2014.5	441.3	375.1	425.6	358.4
Breedon Group	354.00	29.54	33.09	12.0	10.7	6.4	5.8	8%	9%	4.4%	4.7%	1792.6	1869.8	142.0	154.8	282.1	299.4
Bytes Technology	412.40	22.47	24.51	18.4	16.8	12.8	11.2	6%	6%	6.6%	7.3%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	90.40	0.10	0.10	16.6	10.5	9.1	7.1	20%	8%	3.4%	5.5%	1509.8	1497.8	70.5	71.2	104.4	105.0
Carm Home	2.49	0.23	0.25	10.9	9.8	7.7	7.2	4%	8%	4.4%	5.0%	1095.6	1204.2	183.7	200.5	183.6	202.1
Coca-Cola HBC	4442.00	2.93	3.16	17.7	16.4	10.6	9.7	4%	4%	2.5%	2.7%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2
Compass Group	30.80	1.48	1.63	20.9	18.9	11.5	10.6	4%	4%	2.4%	2.6%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranwick	5350.00	301.24	322.29	17.0	16.6	8.9	8.2	3%	3%	2.2%	2.2%	2982.5	3129.0	232.8	250.8	316.4	358.8
CSH	93.09	578.26	632.33	16.1	14.7	9.5	8.7	9%	11%	1.7%	1.7%	39995.1	41932.3	5984.2	6484.6	8248.4	8864.3
DOC	6375.00	437.42	511.23	11.0	12.5	6.3	7.5	12%	9%	4.5%	3.6%	15441.9	16336.2	494.4	563.5	778.3	807.0
Devolver Digital	7.75	0.18	0.67	60.2	15.9	nm	nm	20%	24%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1723.50	1.65	1.68	13.9	14.0	11.3	11.1	8%	6%	2.2%	2.5%	19643.0	18729.9	5901.0	5851.2	6674.0	6334.0
Dole	13.37	129.66	139.84	10.3	9.6	5.4	4.9	9%	13%	2.4%	2.6%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	679.80	0.17	0.19	82.1	36.9	5.7	5.0	nm	nm	2.3%	2.5%	10599.5	11688.8	46.1	225.6	919.7	1255.2
Eden	536.80	56.57	69.91	9.5	7.7	7.5	7.0	8%	7%	1.1%	3.8%	5196.7	5307.3	675.8	779.2	957.4	1015.1
Evo	44.90	17.65	FALSE	2.5	FALSE	4.5	FALSE	53%	FALSE		FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	18.50	1.47	1.57	12.6	11.8	1.4	1.4										
Fever-Tree Drinks	843.50	29.14	39.37	28.9	21.4	17.6	13.4	4%	6%	2.2%	2.3%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	99.57	5.76	9.36	17.3	10.6	10.0	7.2	4%	8%	0.0%	0.0%	18338.1	20586.5	2043.9	2887.9	2777.4	3711.3
Forrester	143.80	11.51	13.18	12.5	10.9	6.7	5.8	14%	12%	5.0%	5.7%	390.7	420.3	38.1	42.0	57.6	63.0
Frontier Development	450.50	849.11	0.00	0.5	nm	3.5	3.7	4%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	46.3
Fulcr. Smith & Turner	756.00	47.18	52.27	13.3	14.5	7.3	8.2	7%	6%	3.4%	3.0%	397.8	413.3	40.8	48.3	74.6	77.7
Games Workshop Group	18750.00	547.81	585.95	34.2	32.0	21.2	19.7	3%	3%	2.6%	2.8%	625.0	671.8	238.5	254.4	283.9	305.1
Glaxo	25.84	1.64	1.79	16.0	14.7	11.7	10.6	5%	4%	1.8%	2.0%	4232.7	4434.4	436.7	472.8	553.9	596.2
Glenworth Properties	2.44	0.21	0.23	11.4	10.5	8.5	7.3	15%	10%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	1025.20	76.63	84.53	13.4	12.1	6.4	5.8	8%	7%	3.8%	3.9%	2685.0	2822.0	169.5	182.1	322.5	340.1
Greencoat Renewable	0.78	0.05	FALSE	15.3	FALSE	20.9	FALSE	17%	FALSE	8.8%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greenore	263.60	26.07	24.02	13.1	11.0	8.3	6.2	8%	10%	1.1%	1.8%	3374.4	4091.1	193.2	248.5	336.3	429.9
Griggs	1811.00	126.55	127.20	14.3	14.2	6.0	5.6	5%	6%	3.8%	3.8%	2283.1	2407.4	197.7	198.6	377.1	399.9
Hammerson	375.00	23.21	25.54	16.2	14.7	1.0	0.9	3%	4%	4.7%	5.0%	227.4	247.5	190.0	203.2	188.6	203.1
Hostelworld Group	111.00	0.13	0.18	10.1	7.3	6.5	4.5	12%	18%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	796.00	52.56	56.26	15.1	14.1	9.0	8.3	6%	6%	2.8%	3.0%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	418.70	0.61	0.77	8.1	6.4	3.9	3.5	12%	10%	2.1%	2.3%	33801.5	35574.1	4244.1	4993.0	6855.6	7655.9
Iluback	84.90	5.68	7.33	14.9	11.6	7.3	6.4	5%	9%	3.4%	4.3%	390.5	420.2	33.1	41.6	67.8	75.3
ICG	7.00																
IRIS REIT	1.09	0.13	0.15	8.5	7.4	0.7	0.7	2%	2%	5.3%	5.3%	68.1	70.4	90.6	102.0	88.0	99.5
J D Wetherspoon	824.50	39.18	48.69	21.0	16.9	8.5	8.0	11%	7%	1.5%	1.5%	2222.7	2324.0	129.9	131.3	235.9	246.8
Jet2	1516.00	190.52	113.44	8.0	13.4	1.2	2.4	20%	nm	1.2%	1.2%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	1266.00	33.13	43.31	38.2	25.1	18.9	5%	5%	1.9%	2.0%	430.3	499.9	45.9	61.9	53.8	70.8	
Kerry Group	82.80	5.13	5.71	16.1	14.5	12.1	11.0	5%	9%	1.9%	2.0%	6861.7	7165.4	952.5	1039.5	1165.9	1357.0
Kingfisher	320.40	23.42	25.14	12.1	12.7	5.3	5.6	10%	9%	4.4%	3.9%	12945.0	13264.7	651.0	686.5	1327.0	1328.3
Kingspan	100.70	4.40	5.73	22.9	17.6	15.0	11.7	3%	4%	0.6%	0.7%	10411.9	12311.4	1092.1	1356.0	1419.1	1780.0
LidlHansa	7.62	0.97	1.07	7.8	7.1	7.9	7.5	23%	17%	3.8%	4.2%	42165.6	42688.5	1649.1	1942.4	2981.2	3188.2
Manitex	51.70	8.78	9.98	5.8	5.2	7.1	6.7	14%	15%	0.0%	3.8%	900.8	916.6	164.6	170.4	210.8	215.8
Mitchells & Butlers	279.00	31.43	33.14	8.9	8.4	6.1	5.8	4%	5%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3
Moten Ventures	678.50	59.68	42.69	11.4	15.9	8.8	12.4	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9
Mondi	857.80	0.51	0.63	19.8	15.8	9.1	7.5	nm	2%	1.8%	3.2%	8493.7	8758.3	369.9	542.3	860.1	1044.3
NCC Group	136.80	4.20	4.73	32.5	28.9	10.6	9.9	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.50	0.54	0.55	8.4	8.2	5.7	5.2	nm	12%	4.0%	4.2%	2166.6	2268.3	86.3	87.5	118.2	121.3
Permanent TSB	2.94	0.23	0.27	13.0	10.8	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9		
Periniem	1143.50	94.20	101.01	12.1	11.3	1.0	0.9	nm	6%	3.5%	3.7%	3905.9	4149.7	461.6	495.1	487.7	522.3
Playtech	391.60	0.22	0.29	20.5	15.6	0.7	0.7	3%	5%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	109.80	9.81	10.33	11.2	10.6	5.4	5.0	4%	7%	2.7%	3.0%	852.4	919.9	67.6	71.2	123.4	129.6
Ruanor	22.80	2.02	1.76	11.8	12.9	6.5	6.3	6%	6%	1.7%	2.0%	15544.3	15973.6	2459.2	2013.4	3832.4	3632.9
Saurfil Westrock	48.19	2.17	2.83	22.2	17.0	7.5	6.9	6%	6%	3.8%	4.1%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	203.00	13.90	16.67	14.6	12.2	6.9	6.5	4%	6%	2.5%	2.9%	3825.4	3979.6	297.7	330.3	635.0	677.9
Tate & Lyle	44.50	36.60	11.2	15.1	7.4	8.5	8%	7%	2.0%	4.4%	3.6%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	82.																