Goodbody Market Commentary Metrics

Goodbody

22 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	9.99	0.84	0.92	11.9	10.9	1.5	1.4			5.4%	5.9%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	10.09	3.90	8.34	2.6	1.2	3.6	2.8	69%	115%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2
Applied Nutrition	216.00	11.41	12.82	18.9	16.9	12.8	11.1	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Reta	170.10	21.15	21.88	8.0	7.8	5.8	5.6	14%	14%	5.9%	6.1%	5771.2	5984.5	353.4	361.6	450.1	460.1
Bank of Ireland	17.09	1.47	1.78	11.6	9.6	1.2	1.2			4.7%	5.6%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	250.90	29.14	35.88	8.6	7.0	0.4	0.4	nm	15%	6.8%	8.2%	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	1846.00	183.78	213.85	10.0	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	3310.00	342.80	354.08	9.7	9.3	0.9	0.8	5%	13%	3.7%	1.9%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	284.80	30.07	34.93	9.5	8.2	5.3	4.8	9%	9%	5.5%	5.8%	1786.3	1862.1	142.0	158.9	281.4	302.7
Bytes Technology	345.80	22.47	24.51	15.4	14.1	10.4	9.0	7%	7%	7.9%	8.7%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	110.40	0.11	0.11	12.2	11.6	7.5	7.7	5%	6%	5.0%	5.0%	1586.8	1545.6	71.8	72.5	107.4	108.1
Cairn Homes	2.29	0.23	0.25	10.0	9.0	7.0	6.6	5%	9%	5.0%	5.5%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4284.00	2.92	3.14	17.0	15.8	10.3	9.5	4%	4%	2.6%	2.8%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	31.55	1.48	1.63	21.4	19.4	11.8	10.9	4%	4%	2.3%	2.6%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5530.00	297.22	315.87	18.6	17.5	9.3	8.7	3%	2%	1.9%	2.0%	2994.5	3175.4	227.9	240.1	325.1	344.0
CRH	101.03	585.55	660.57	17.3	15.3	9.9	9.2	10%	11%	1.5%	1.6%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4
DCC	6125.00	437.42	511.23	11.0	12.0	6.3	7.2	12%	9%	4.5%	3.7%	15441.9	16336.2	494.4	563.5	778.3	807.0
Devolver Digital	21.50	0.18	0.67	164.2	43.4	8.2	5.9	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1585.50	1.59	1.61	13.4	13.2	11.5	11.0	7%	6%	2.6%	3.0%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	14.54	135.26	144.02	10.7	10.1	4.8	4.4	11%	12%	2.3%	2.5%	9488.2	9634.5	284.2	293.4	407.7	419.3
easyJet	350.30	18.11	33.65	19.3	10.4	2.4	2.6	nm	nm	4.4%	4.9%	10928.0	11793.0	138.2	365.0	1105.1	1393.5
Entain	537.80	60.21	71.83	8.9	7.5	6.4	5.9	11%	12%	3.8%	4.0%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	34.20	17.65	FALSE	1.9	FALSE	4.4	FALSE	70%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.75	1.47	1.57	11.4	10.7	1.3	1.3										
Fever-Tree Drinks	782.00	29.14	39.37	26.8	19.9	16.2	12.4	4%	6%	2.4%	2.5%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	95.92	5.91	9.45	16.2	10.1	9.6	7.0	4%	9%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5
Forterra	138.20	11.51	13.18	12.0	10.5	6.4	5.6	14%	12%	5.2%	5.9%	390.7	420.3	38.1	42.0	57.6	63.0
Frontier Developments	399.00	849.11	0.00	0.5	nm	3.1	3.2	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	636.00	43.47	48.57	14.6	13.1	7.9	7.5	4%	5%	3.7%	4.0%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	19050.00	547.81	585.95	34.8	32.5	21.5	20.0	3%	3%	2.6%	2.8%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	23.35	1.50	1.63	15.5	14.3	11.4	10.4	5%	6%	2.0%	2.2%	4107.8	4242.3	409.9	441.6	535.1	567.7
Glenveagh Properties	2.20	0.21	0.23	10.4	9.6	12.0	10.6	14%	10%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	810.30	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	0.78	0.05	FALSE	15.3	FALSE	20.9	FALSE	17%	FALSE	8.8%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	233.60	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	1728.00	122.02	122.78	14.2	14.1	5.8	5.5	4%	6%	4.0%	4.0%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	329.20	22.65	24.70	14.5	13.3	0.8	0.8	8%	10%	5.4%	5.7%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	109.50	0.13	0.18	9.9	7.2	6.4	4.4	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	756.50	51.39	57.32	14.7	13.2	8.3	7.7	6%	6%	3.0%	3.2%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	390.70	0.64	0.74	7.1	6.1	3.6	3.4	12%	9%	2.3%	2.5%	35101.0	36582.9	4648.7	4975.7	6994.8	7540.9
Ibstock	99.75	6.26	7.53	15.9	13.3	7.7	7.0	5%	8%	3.2%	3.8%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.40	0.49	0.54	13.1	11.9	7.6	6.8	4%	13%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.07	0.13	0.15	8.4	7.3	0.8	0.7	2%	2%	5.4%	5.3%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	610.00	46.03	51.49	13.3	11.8	7.4	7.1	6%	6%	2.0%	2.0%	2222.8	2319.4	132.0	139.1	247.3	255.0
Jet2	1103.00	190.52	113.44	5.8	9.7	0.2	1.1	27%	nm	1.6%	1.6%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	846.00	33.13	43.31	25.5	19.5	16.2	12.0	7%	8%	2.9%	2.9%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	74.55	5.01	5.51	14.9	13.5	11.3	10.3	6%	5%	2.1%	2.3%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4
Kingfisher	293.40	23.42	25.12	12.1	11.7	5.3	5.3	10%	10%	4.4%	4.2%	12945.0	13234.4	651.0	685.9	1327.0	1326.8
Kingspan	73.40	4.18	4.62	17.5	15.9	11.8	10.7	5%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	7.81	1.06	1.52	7.3	5.1	7.8	6.1	19%	22%	4.1%	5.8%	42111.9	43620.3	1779.7	2631.1	3065.1	3942.6
Marston's	48.05	9.02	10.21	5.3	4.7	6.9	6.4	18%	18%	0.0%	4.2%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	235.00	31.57	33.42	7.4	7.0	5.5	5.1	7%	8%	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	731.20	0.45	0.72	19.0	11.7	7.7	6.4	3%	4%	2.9%	4.3%	8180.1	8523.7	399.5	578.5	917.9	1092.9
NCC Group	140.20	4.20	4.73	33.4	29.6	10.8	10.1	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.64	0.54	0.57	8.5	8.1	5.4	5.1	5%	10%	3.9%	4.1%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.91	0.23	0.27	12.9	10.7	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9		
Persimmon	1062.50	102.91	113.64	10.3	9.3	0.9	0.9	nm	8%	3.8%	4.0%	4017.7	4280.1	502.4	550.8	526.6	578.2
Playtech	351.00	0.22	0.29	18.2	13.8	0.7	0.6	4%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	96.20	9.81	10.33	9.8	9.3	4.9	4.6	4%	8%	3.1%	3.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	23.46	2.12	1.85	11.9	12.7	6.5	6.6	6%	6%	1.7%	2.0%	15544.3	16091.1	2459.2	2148.1	3832.6	3570.1
Smurfit Westrock	2764.00	2.17	2.83	17.1	13.1	6.3	5.8	8%	8%	4.9%	5.3%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	162.10	13.90	16.67	11.7	9.7	6.4	6.1	5%	7%	3.1%	3.6%	3825.4	3979.6	297.7	330.3	635.0	677.9
Tate & Lyle	508.00	40.87	43.21	12.4	11.8	7.5	7.1	5%	9%	4.0%	4.2%	2014.2	2013.8	287.5	292.1	417.9	422.2
Taylor Wimpey	78.54	7.69	9.29	10.2	8.5	0.7	0.7	8%	9%	12.7%	13.4%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	271.00	27.01	29.27	10.0	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	525.00	60.01	FALSE	8.7	FALSE	4.9	FALSE	9%	FALSE	5.3%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	237.00	0.04	0.06	79.5	56.8	27.2	19.2	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.55	0.26	0.28	17.5	16.2	10.0	7.2	nm	9%	0.4%	0.4%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	267.80	7.51	30.45	35.7	8.8	2.9	1.8	35%	11%	0.0%	0.0%	4301.4	4532.5	290.8	396.1	356.9	486.0
WH Smith	502.50	48.12	50.21	10.4	10.0	6.0	5.8	nm	3%	0.0%	2.5%	1597.7	1620.9	124.8	129.6	178.3	183.1
Whitbread	2367.00																
Wickes Group	175.60	21.94	26.33	8.0	6.7	4.7	4.2	5%	11%	6.8%	8.0%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	948.00	-0.54	-1.95	nm	nm	9.1	5.9	39%	62%	0.0%	0.0%	5804.3	6899.2	28.2	-118.9	1168.3	1190.9

Closing prices as of: *21/05/2026*