

Goodbody Market Commentary Metrics



January 2026																				
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA				
Company	1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	
AIB Group	9.29	0.82	0.90	11.4	10.3	1.3	1.2					4.7%	5.7%	4563.4	4702.4	2188.1	2269.9			
Air France-KLM	11.04	5.23	5.66	2.1	1.9	3.3	3.0	53%	81%	0.0%	0.0%	34235.8	35682.0	2000.2	2117.3	5017.9	5256.6			
Applied Nutrition	241.50	10.87	12.23	22.2	19.8	15.2	13.2	2%	2%	3%	0.0%	0.0%	134.8	150.5	36.4	40.4	37.9	42.0		
B&M European Value Ret	174.10	24.04	26.87	7.2	6.5	5.4	5.1	16%	14%	6.0%	6.9%	5812.2	6077.1	392.9	419.7	490.2	519.6			
Bank of Ireland	16.86	1.56	1.81	10.8	9.3	1.2	1.1			4.1%	4.4%	4181.7	4414.4	1794.1	2007.6					
Barratt Redrow	382.40	29.14	35.88	13.1	10.7	0.7	0.6	nm	10%	4.4%	5.4%	5805.3	6417.2	609.3	726.2	613.7	727.7			
Bellway	2720.00	188.09	228.21	14.5	11.9	0.9	0.8	12%	7%	2.8%	3.4%	3003.0	3216.2	332.4	388.1	335.4	388.7			
Berkeley Group	4032.00	342.80	354.08	11.8	11.4	1.1	1.0	4%	11%	3.0%	1.6%	2270.4	2331.6	452.2	459.2	441.0	447.0			
Breedon Group	342.60	29.89	35.36	11.5	9.7	5.9	5.3	8%	9%	4.7%	4.9%	1763.2	1848.1	159.6	178.8	282.8	306.8			
Bytes Technology	332.80	23.50	26.39	14.2	12.6	9.6	8.0	8%	8%	8.6%	9.8%	228.1	250.9	67.0	77.2	68.7	79.2			
C & C Group	128.60	0.12	0.14	12.2	10.8	7.6	7.4	5%	7%	4.3%	4.6%	1602.7	1597.1	79.7	84.9	115.3	120.5			
Cairn Homes	2.17	0.23	0.24	9.6	9.0	6.7	6.4	12%	8%	4.6%	5.1%	1045.0	1088.4	177.7	185.0	182.6	190.7			
Coca-Cola HBC	3908.00	2.89	3.13	15.5	14.3	9.5	8.8	4%	5%	2.8%	3.1%	12315.3	13029.4	1465.0	1580.5	1894.4	2021.9			
Compass Group	2255.00	1.44	1.56	21.1	19.5	11.9	11.2	4%	4%	2.4%	2.6%	50221.3	53448.4	3654.2	3916.5	5022.0	5300.0			
Cranswick	5030.00	297.22	315.87	16.9	15.9	8.5	8.0	3%	3%	2.1%	2.2%	2994.5	3175.4	227.9	240.1	325.1	344.0			
CRH	124.49	585.33	655.23	21.3	19.0	12.2	11.4	7%	8%	1.2%	1.3%	39902.0	41603.7	6011.0	6485.0	8197.6	8755.5			
DCC	4570.00	421.97	505.84	10.8	9.0	6.6	6.1	12%	13%	4.7%	5.0%	14964.1	15168.2	521.6	559.4	788.0	829.2			
Devolver Digital	22.50	0.18	0.67	172.7	45.6	9.0	6.5	7%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8			
Diageo	1695.00	1.63	1.73	14.0	13.2	12.0	11.4	6%	6%	4.5%	4.8%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4			
Dole	15.31	148.86	158.22	10.3	9.7	4.8	4.4	9%	10%	9085.1	9270.0	298.4	309.0	408.0	418.5					
easyJet	496.70	72.79	80.15	6.8	6.2	2.2	2.2	6%	4%	3.1%	3.4%	11136.1	11799.0	727.3	834.1	1617.4	1847.2			
Entain	677.40	64.59	77.21	10.5	8.8	7.4	7.2	9%	10%	3.1%	3.2%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7			
Evoke	30.20	17.65	FALSE	1.7	FALSE	4.3	FALSE	79%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE			
FBD Holdings	16.90																			
Fever-Tree Drinks	899.00	28.99	37.75	31.0	23.8	18.9	14.9	3%	5%	2.1%	2.2%	411.5	451.3	35.2	47.5	50.2	63.6			
Flutter Entertainment	179.94	12.07	15.76	14.9	11.4	9.7	7.9	7%	9%	0.0%	0.0%	19780.1	21813.4	3522.1	4277.1	4234.2	5062.4			
Forterra	176.40	14.50	18.85	12.2	9.4	6.0	4.7	12%	14%	3.9%	5.1%	413.7	448.9	49.9	62.1	74.3	87.3			
Frontier Developments	473.50	849.11	0.00	0.6	nm	3.7	3.9	4%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3			
Fuller, Smith & Turner	722.00	43.47	48.57	16.6	14.9	8.5	8.2	4%	5%	3.3%	3.5%	396.2	413.5	43.2	47.6	73.3	76.9			
Games Workshop Group	17940.00	547.81	585.95	32.7	30.6	20.2	18.8	3%	3%	2.7%	2.9%	625.0	671.8	238.5	254.4	283.9	305.1			
Glanbia	18.66	1.45	1.58	12.9	11.8	9.2	8.2	8%	8%	2.7%	2.9%	389.9	404.9	382.4	417.4	530.1	566.4			
Glenveagh Properties	2.01	0.21	0.22	9.5	9.2	10.9	10.0	14%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6			
Grafton Group	935.60	74.77	80.43	12.5	11.6	6.1	5.6	6%	7%	4.3%	4.5%	2623.2	2724.0	168.3	183.3	321.3	341.3			
Greencoat Renewables	0.70	0.14	FALSE	4.8	FALSE	14.7	FALSE	20%	FALSE	10.7%	FALSE	215.4	FALSE	187.9	FALSE	187.9	FALSE			
Greencore	269.50	16.21	23.18	16.6	11.6	9.2	6.6	5%	9%	1.8%	2.6%	3504.5	4372.9	224.8	318.0	330.1	447.2			
Greggs	1660.00	124.39	132.84	13.3	12.5	5.6	5.1	3%	7%	3.7%	4.0%	2305.8	2459.0	189.7	201.4	372.0	401.3			
Hammerson	336.40	22.46	26.19	15.0	12.8	0.9	0.8	11%	18%	7.5%	7.5%	215.0	242.6	178.0	203.8	177.0	201.8			
Hopeworld Group	117.50	0.15	FALSE	9.3	FALSE	5.6	FALSE	12%	FALSE	0.0%	FALSE	107.8	FALSE	12.1	FALSE	24.0	FALSE			
Howden Joinery	862.50	50.52	53.31	17.1	16.2	9.6	9.2	5%	5%	3.2%	3.4%	2512.5	2609.6	365.0	376.9	528.4	544.6			
IAG	430.30	0.75	0.83	6.6	6.0	2.8	2.5	16%	19%	2.1%	2.2%	34276.4	35566.3	5195.8	5288.9	8071.3	8322.2			
Ibstock	132.00	7.48	9.52	17.7	13.9	9.0	7.8	7%	8%	2.9%	3.6%	408.3	436.2	41.1	51.7	77.4	86.6			
ICG	6.32	0.49	0.54	12.9	11.8	7.5	6.7	4%	13%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1			
IRIS REIT	0.95	0.14	0.15	7.0	6.2	0.7	0.6	3%	3%	5.5%	5.9%	67.6	69.9	93.9	102.4	90.4	98.9			
J D Wetherspoon	688.50	48.97	53.22	14.1	12.9	7.6	7.4	6%	6%	1.7%	1.7%	2243.1	2356.2	141.1	146.1	256.5	262.3			
Jet2	1296.00	187.52	199.17	6.9	6.5	1.5	1.2	9%	15%	1.4%	1.4%	7595.5	8223.8	432.0	440.2	770.2	810.0			
Kamos Group	953.50	33.66	38.15	28.3	25.0	17.4	15.2	4%	6%	2.6%	2.6%	395.6	413.9	51.9	58.9	59.8	67.8			
Kerry Group	73.50	5.35	5.89	13.8	12.5	10.3	9.3	5%	6%	2.1%	2.3%	7072.9	7358.0	1007.1	1101.6	1399.5	1406.0			
Kingsfisher	323.60	22.02	23.73	14.7	13.6	6.0	5.5	6%	10%	3.8%	3.8%	12956.6	13317.9	658.7	673.6	1328.9	1359.4			
Kingspan	72.30	4.25	4.81	17.0	15.0	11.7	10.6	5%	5%	0.9%	0.9%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5			
Lufthansa	8.97	1.24	1.54	7.2	5.8	6.9	6.0	16%	19%	4.1%	5.1%	41656.1	43551.9	2156.2	2615.4	3554.4	4067.9			
Manston's	67.70	9.02	10.21	7.5	6.6	7.5	7.0	13%	13%	0.0%	3.0%	908.6	930.0	166.0	174.5	211.6	220.0			
Mitchells & Butlers	266.50	31.57	33.42	8.4	8.0	5.9	5.5	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1			
Molten Ventures	512.50	33.24	46.11	15.4	11.1	12.7	9.2	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8			
Mondi	877.60	0.89	1.10	11.3	9.1	6.9	6.2	3%	6%	6.1%	6.5%	7951.4	8356.1	651.6	765.8	1120.7	1233.8			
NCC Group	135.00	4.20	4.73	32.1	28.5	10.5	9.8	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3			
Origin Enterprises	4.19	0.54	0.57	7.7	7.3	5.0	4.7	6%	11%	4.3%	4.6%	2129.2	2173.2	86.3	89.1	120.8	125.4			
Permanent TSB	3.05	0.21	0.29	14.8	10.7	0.7	0.7			2.3%	3.9%	698.1	766.6	171.7	221.2					
Persimmon	1411.50	103.14	116.00	13.7	12.2	1.2	1.1	4%	7%	2.8%	3.0%	3861.4	4154.5	494.9	548.6	520.6	577.3			
Playtech	273.50	0.20	0.28	15.7	11.2	0.5	0.5	4%	6%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6			
Rank Group	98.40	10.62	13.56	9.3	7.3	4.7	3.9	5%	11%	3.2%	4.4%	852.6	919.9	72.4	90.4	128.2	148.8			
Ryanair	29.41	2.09	2.35	14.0	12.5	7.9	6.9	9%	9%	1.4%	1.6%	15461.8	162							