

Goodbody Market Commentary Metrics



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	7.58	0.80	0.79	9.5	9.6	1.1	1.1			5.2%	5.4%	4428.2	4479.6	2087.0	2104.3			
Air France-KLM	11.75	6.15	5.36	1.9	2.2	3.4	3.2	52%	79%	0.0%	0.0%	33124.4	34426.2	1901.7	2009.3	4698.6	4901.8	
Applied Nutrition	185.80	9.12	10.12	20.4	18.4	14.4	12.5	3%	4%	0.0%	0.0%	107.0		29.8	33.2	30.9	34.3	
B&M European Value Ret	179.60	34.42	27.26	11.9	6.6	8.2	5.1	7%	17%	3.7%	7.5%	5571.0	5812.2	527.0	435.5	619.0	532.8	
Bank of Ireland	13.35	1.44	1.57	9.3	8.5	1.0	0.9			4.8%	5.2%	4120.3	4181.7	1708.5	1794.1			
Bakkavor Group	221.50																	
Barclay Redrow	405.90	35.48	29.14		11.4	13.9	0.7	0.7	nm	5%	3.9%	4.2%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2726.00	172.35	192.69	15.8	13.8	0.9	0.9	0.9	4%	8%	2.6%	2.9%	2780.5	2999.9	299.1	337.6	305.2	327.2
Berkley Group	4180.00	370.16	317.54	11.9	13.2	1.3	1.2	4%	1%	5%	1.6%	2.9%	2486.5	2374.4	514.7	440.0	503.8	435.0
Bredon Group	345.40	30.51	33.50	11.2	10.3	6.1	5.6	5%	9%	4.4%	4.6%	1748.8	1832.9	162.1	126.9	284.3	304.4	
Budes Technology	371.60	22.88	23.50	21.3	15.8	15.8	11.0	4%	7%	2.3%	7.7%	212.7	228.1	66.4	67.0	67.9	68.7	
C & C Group	140.60	0.12	0.12	15.9	13.2	8.9	8.2	3%	5%	3%	4%	0%	1665.5	1652.6	77.2	79.7	112.0	115.3
Clarn Homes	1.93	0.20	0.23	9.5	8.6	6.0	6.7	0%	18%	4%	4.7%	5.0%	946.3	1045.0	162.6	177.7	167.1	182.6
Coca-Cola HBC	3474.00	2.67	2.86	14.9	14.0	9.4	8.7	4%	5%	2.9%	3.2%	11535.2	12191.1	1341.2	1447.1	1749.8	1872.2	
Compass Group	2622.00	1.31	1.43	26.7	24.5	15.6	14.6	3%	3%	1.9%	2.0%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9	
Cranwick	5120.00	273.41	292.01	17.3	17.5	9.2	8.8	3%	3%	2.1%	2.1%	2723.3	2942.6	190.8	220.0	293.2	315.2	
CRH	116.98	544.93	605.90	21.5	19.3	12.4	11.6	7%	8%	1.3%	1.3%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5	
Dalata Hotel Group	6.43																	
DEC	4894.00	401.60	433.35	13.4	11.3	8.1	6.9	8%	12%	3.8%	4.4%	18011.1	14959.5	439.6	521.4	784.0	787.9	
Devolver Digital	25.50	0.14	0.70	237.7	48.6	11.0	7.4	8%	7%	0.0%	0.0%	109.6		0.6	4.4	5.2	9.0	
Diageo	1851.00	1.66	1.70	18.0	14.6	12.1	11.6	6%	6%	3.5%	4.2%	20245.0	20474.4	5897.0	6066.3	7422.0	6673.0	
Dole	13.08	129.83	141.67	10.1	9.2	4.8	4.2	8%	13%	2.6%	2.7%	8885.2	8802.1	283.7	296.5	393.1	408.0	
easyJet	493.30	69.60	78.55	7.1	6.3	2.3	2.0	20%	17%	10%	2.9%	3.1%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	824.00	57.75	73.60	14.3	11.2	8.2	7.6	3%	7%	2.4%	2.5%	5351.6	5594.6	808.2	922.0	1139.2	1212.2	
Evolve	42.15	11.35	17.65	3.7	2.4	5.3	4.5	40%	57%	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	FALSE	FALSE	8.8%	FALSE	422.9	FALSE	56.6	FALSE			
Fever-Tree Drinks	877.00	24.15	29.72	36.3	29.5	20.2	17.7	4%	4%	2.0%	2.1%	374.5	412.0	30.9	37.0	44.9	52.0	
Flutter Entertainment	252.22	8.04	12.13	31.4	20.8	16.7	12.7	3%	5%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7	
Forterra	179.80	13.07	14.50	13.8	12.4	7.7	6.1	7%	12%	3.2%	3.8%	380.9	413.7	41.4	49.9	62.4	74.3	
Frontier Developments	469.00	587.49	849.11	0.8	0.6	4.7	4.3	4%	4%	0.0%	0.0%	90.6	96.6	5.7	9.1	36.0	38.4	
Fuller, Smith & Turner	606.00	34.22	40.26	19.2	15.1	8.6	8.0	nm	5%	3.0%	3.6%	376.3	394.6	47.2	42.4	67.6	70.1	
Games Workshop Group	15210.00	525.16	561.13	29.0	27.1	18.1	16.8	3%	4%	3.0%	3.2%	586.6	630.0	229.1	244.3	270.3	289.8	
Glanbia	17.28	1.33	1.45	13.0	11.9	10.3	9.3	7%	8%	2.6%	2.9%	3871.8	3820.0	353.2	383.8	502.6	532.7	
Glenveagh 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	955.50	70.31	75.86	13.6	12.6	6.7	6.2	4%	6%	4.0%	4.2%	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	248.00																	
Greqq	1708.00	129.34	132.76	13.2	12.9	6.2	5.8	nm	4%	3.8%	3.9%	2171.5	2354.7	190.6	199.2	354.9	384.5	
Hammerston	303.60																	
Hostelworld Group	125.00	0.11	0.15	12.8	9.9	8.2	6.0	9%	11%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0	
Howden Joinery	863.50	46.32	50.52	18.6	17.1	10.1	9.6	4%	5%	2.8%	3.2%	2418.6	2512.5	340.3	365.0	498.8	528.4	
IAG	102.60	0.66	0.75	7.0	6.2	3.0	2.6	15%	19%	2.6%	3.2%	33522.1	34437.3	4950.0	5227.8	7569.5	8103.3	
Ibstock	137.80	6.24	11.12	22.1	12.4	10.3	7.2	0%	10%	2.5%	4.1%	382.4	426.6	38.1	61.0	72.5	99.0	
ICG	5.80	0.40	0.44	14.5	13.2	7.6	7.0	11%	4%	2.8%	3.0%	633.6	664.4	74.1	79.3	143.1	148.3	
IRIS REIT	0.94	0.06	0.13	15.7	7.1	0.7	0.0	2%	3%	5.0%	5.4%	65.7	67.6	54.7	92.0	52.0	89.4	
J D Wetherspoon	659.50	48.06	53.97	13.9	12.2	7.2	7.5	8%	6%	1.8%	1.8%	2127.5	2223.5	146.4	151.2	259.7	264.7	
Jet2	1327.00	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	955.00	30.80	33.66	29.6	28.4	19.9	17.5	5%	4%	36.7%	2.6%	367.2	395.6	41.8	51.9	49.6	59.8	
Kerry Group	79.30	4.88	5.41	16.2	14.7	12.2	11.1	4%	5%	1.8%	1.9%	6907.3	7110.7	933.8	1017.4	1236.4	1321.9	
Kingfisher	307.50	20.41	19.97	12.9	15.4	5.5	5.9	10%	8%	4.7%	4.0%	12784.0	12842.4	628.0	608.8	1299.0	1272.8	
Kingspan	69.60	3.83	4.15	18.2	16.8	12.2	11.4	4%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1	
Lufthansa	7.12	1.07	1.22	6.6	5.8	6.9	6.3	18%	20%	4.5%	5.2%	39170.1	41082.1	1900.5	2134.9	3216.4	3527.8	
Marston's	45.10	7.80	8.74	5.8	5.2	7.4	7.0	14%	15%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2	
Mitchells & Butlers	252.50	28.97	30.05	8.7	8.4	6.2	5.9	8%	6%	0.0%	0.0%	2712.1	2822.2	325.8	330.1	458.5	466.9	
Molten Ventures	411.80	-0.43	33.24	nm	12.4	63.1	10.4	8%	1%	0.0%	0.0%	43.6	111.2	10.0	77.7	10.3	77.8	
Mondi	834.60	0.70	0.90	13.7	10.7	7.2	6.6	nm	4%	4.8%	6.4%	7553.0	8072.4	550.6	658.6	1047.5	1134.8	
NCC Group	157.80	5.53	7.09	28.5	22.3	10.5	9.2	4%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9	
Origin Enterprises	3.65	0.52	0.54	7.1	6.8	6.0	5.7	nm	7%	4.7%	4.9%	2177.5	2256.2	79.6	83.8	111.3	117.1	
Permanent TSB	2.30	0.07	0.21	32.3	10.7	0.6	0.5	0.0%	0.0%	0.9%	3.0%	650.5	694.0	125.5	172.6			
Persimmon	1253.00	93.59	104.31	13.4	12.0	1.1	1.0	nm	4%	3.2%	3.2%	3523.6	3758.4	444.9	489.6	467.4	514.9	
Playtech	284.00	0.14	0.20	21.6	16.3	0.5	0.5	2%	3%	0.0%	0.0%	797.8	831.6	73.9	89.4	175.2	193.7	
Rank Group	126.40	8.88	10.62	9.9	11.9	4.7	5.7	4%	5%	2.2%	2.5%	795.4	852.6	63.7	72.4	116.5	128.2	
Ryanair	25.60	1.45	2.05	12.5	12.5	6.2	7.2	10%	9%	2.2%	1.6%	13948.5	15245.3	1558.0	2339.5	2722.4	361.8	
Soufflt Westrock	42.83	2.95	3.28	14.5	13.1	7.0	7.3	5%	8%	4.0%	4.3%	31378.3	32808.0	2453.2	2905.7	5120.3	5664.4	
SSP Group	165.00	11.51	13.48	14.3	12.2	7.2	6.5	2%	3%	2.4%	2.9%	3644.8	3812.8	260.4	287.3	553.2	633.3	
Tate & Lyle	386.60	50.26	38.68	13.1	10.0	10.1	7.4	7%	8%	3.0%	5.2%	1736.4	2039.7	287.6	282.6	380.6	420.7	
Taylor Wimpey	108.45	8.00	9.30	13.6	11.7	0.9	0.9	3%	9%	8.6%	9.2%	3767.6	4015.1	428.1	490.5	435.6	497.2	
Everplay Group	402.00	26.38	28.01	15.2	14.3	6.6	6.0	4%	5%	0.0%	0.0%	175.9	181.2	35.8	38.9	69.7	72.2	
Travis Perkins	649.50	49.14	60.01	13.2	10.8	6.2	5.6	6%	7%	3.5%	4.3%	4697.5	4874.0	161.4	196.2	354.3	391.5	
Trustpilot Group	199.90	0.03	0.05	88.0	58.8	33.8	25.7	4%	4%	0.0%	0.0%	249.2	285.1	17.6	25.7	29.6	37.7	
Uniphar	4.00	0.22	0.24	18.2	16.9	9.8	9.0	6%	7%	0.5%	0.5%	2890.7	2981.4	97.1	107.0	133.0	143.3	
Vistry Group	682.60	38.61	49.00	17.7	13.9	6.5	5.4	7%	7%	0.0%	0.0%	4293.3	4536.5	404.2	442.6	353.4	400.5	
WH Smith	682.00	61.56	65.61	11.1	10.4	9.8	9.7	5%	6%	5.0%	4.1%	1530.1	1618.5	139.7	148.4	200.9	200.2	
Whitbread	3154.00																	
Wickes Group	224.50	17.68	22.15	12.7	10.1	5.7	5.0	4%	8%	4.8%	5.3%	1606.9	1685.2	72.5	82.5	191.4	205.8	
Wizz Air	1130.00	1.67	0.03	11.8	375.6	9.6	8.1	25%	31%	0.0%	0.0%	5267.6	60					

Closing prices as of: 22/10/2025