

Goodbody Market Commentary Metrics



24 February 2026																			
Company	Price 1c	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA			
		2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027		
AIB Group	8.87	0.81	0.90	10.9	9.9	1.3	1.2			4.9%	6.0%	4569.1	4708.1	2193.7	2275.6				
Air France-KLM	13.14	5.98	7.52	2.2	1.7	3.2	2.9	68%	88%	0.0%	0.0%	34552.6	36037.2	2206.4	2647.0	5404.1	6076.3		
Applied Nutrition	249.00	11.41	12.82	21.8	19.4	14.9	13.0			0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0		
BAM European Value Retn	188.40	21.43	22.68	8.8	8.3	6.2	6.0	13%	13%	5.3%	5.4%	5771.2	5996.4	357.3	368.3	454.0	466.9		
Bank of Ireland	16.82	1.58	1.83	10.6	9.2	1.2	1.1			4.1%	4.5%	4200.8	4421.8	1813.1	2015.0				
Barratt Redrow	375.30	29.14	35.88	12.9	10.5	0.6	0.6	nm	10%	4.5%	5.5%	5805.3	6417.2	609.3	726.2	613.7	727.7		
Bellway	2816.00	188.09	228.21	15.0	12.3	0.9	0.8	11%	7%	2.7%	3.3%	3003.0	3216.2	332.4	388.1	335.4	388.7		
Berkeley Group	4324.00	342.80	354.08	12.6	12.2	1.1	1.1	4%	10%	2.8%	1.5%	2270.4	2331.6	452.2	459.2	441.0	447.0		
Breedon Group	361.20	29.89	35.36	12.1	10.2	6.1	5.5	8%	8%	4.4%	4.6%	1763.2	1848.1	159.6	178.8	282.8	306.8		
Bvies Technology	290.20	23.50	26.39	12.4	11.0	8.1	6.7	9%	9%	9.9%	11.2%	228.1	250.9	67.0	77.2	68.7	79.2		
C & C Group	114.20	0.11	0.11	12.4	12.1	7.6	7.9	5%	6%	4.9%	4.9%	1586.8	1525.6	71.8	71.8	107.4	107.4		
Cairn Homes	2.34	0.23	0.24	10.3	9.7	7.3	6.9	11%	8%	4.3%	4.7%	1045.0	1088.4	177.7	185.0	182.6	190.7		
Coca-Cola HBC	4850.00	2.92	3.14	19.0	17.7	11.4	10.6	4%	4%	2.3%	2.5%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6		
Compass Group	2155.00	1.46	1.58	20.0	18.4	11.4	10.7	4%	5%	2.5%	2.7%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5		
Cranwick	5410.00	297.22	315.87	18.2	17.1	9.1	8.5	3%	3%	2.0%	2.1%	2294.5	3175.4	227.9	240.1	325.1	344.0		
CBH	121.49	585.31	655.21	20.8	18.5	11.9	11.1	8%	9%	1.3%	1.3%	39902.0	41603.7	6010.9	6484.8	8197.4	8755.4		
DCC	5100.00	421.97	505.84	12.1	10.1	7.3	6.7	11%	11%	4.2%	4.5%	14964.1	15168.2	521.6	559.4	788.0	829.2		
Devolver Digital	25.00	0.18	0.67	19.2	50.7	10.6	7.7	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8		
Diageo	1858.00	1.63	1.73	15.4	14.5	12.8	12.1	6%	6%	4.1%	4.3%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4		
Dole	15.80	148.96	158.44	10.6	10.0	5.0	4.6	9%	10%	2.4%	2.5%	9311.8	9501.3	298.6	309.3	408.1	418.9		
easyJet	469.60	73.47	81.16	6.4	5.8	2.0	2.0	7%	7%	3.3%	3.6%	11209.3	11869.9	738.1	848.5	1613.7	1857.8		
Entain	563.20	64.59	77.21	8.7	7.3	6.8	6.5	10%	12%	3.7%	3.9%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7		
Evoke	29.25	17.65	FALSE	1.7	FALSE	4.3	FALSE	81%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE		
FBD Holdings	16.55																		
Fever-Tree Drinks	948.00	29.23	39.36	32.4	24.1	20.1	15.4	3%	5%	2.0%	2.1%	405.4	444.5	35.8	50.5	50.1	65.1		
Flutter Entertainment	116.33	9.08	13.27	12.8	8.8	8.8	6.6	8%	12%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5		
Forterra	191.60	14.50	18.85	13.2	10.2	6.4	5.1	11%	13%	4.1%	4.7%	413.7	448.9	49.9	62.1	74.3	87.3		
Frontier Developments	408.50	849.11	0.00	0.5	nm	3.2	3.3	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3		
Fuller, Smith & Turner	728.00	43.47	48.57	16.7	15.0	8.6	8.2	4%	4%	3.2%	4.1%	396.2	413.5	43.2	47.6	73.3	76.9		
Games Workshop Group	17430.00	547.81	585.95	31.8	29.7	19.7	18.3	3%	3%	2.8%	3.0%	629.0	671.8	238.5	254.4	283.9	305.1		
Glanbia	19.33	1.45	1.58	13.3	12.2	9.5	8.5	7%	8%	2.6%	2.8%	3850.9	4044.9	382.4	417.4	530.1	566.4		
Glenveagh Properties	2.20	0.21	0.22	10.4	10.0	11.9	11.0	12%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6		
Grafton Group	972.20	74.77	80.43	13.0	12.1	6.3	5.8	6%	7%	4.1%	4.3%	2623.2	2724.0	168.3	183.3	321.3	341.3		
Greencoat Renewables	0.67	0.05	FALSE	13.0	FALSE	19.6	FALSE	20%	FALSE	10.3%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE		
Greencore	267.00	16.21	23.18	16.5	11.5	9.2	6.6	5%	9%	1.8%	2.6%	3504.5	4372.9	224.8	318.0	330.1	447.2		
Greggs	1581.00	124.39	132.84	12.7	11.9	5.4	4.9	3%	8%	3.9%	4.2%	2305.8	2459.0	189.7	201.4	372.0	401.3		
Hammsom	358.40	22.46	26.19	16.0	13.7	0.9	0.9	11%	17%	7.1%	7.0%	215.0	242.6	178.0	203.8	177.0	201.8		
Hostelworld Group	108.00	0.13	0.18	9.6	7.0	6.2	4.3	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9		
Howden Joinery	851.50	50.27	53.10	16.9	16.0	9.5	9.2	5%	5%	3.2%	3.4%	2495.9	2592.7	363.2	375.5	526.6	543.1		
IAG	429.90	0.78	0.87	6.3	5.6	2.7	2.4	17%	20%	2.1%	2.2%	34358.9	35651.9	5414.3	5569.3	8289.9	8602.6		
Ibstock	131.60	7.48	9.52	17.6	13.8	9.0	7.8	7%	8%	2.9%	3.6%	408.3	436.2	41.1	51.7	77.4	86.6		
ICG	6.58	0.49	0.54	13.5	12.2	7.7	7.0	4%	12%	2.6%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1		
IRIS REIT	1.08	0.14	0.15	7.9	7.0	0.8	0.7	3%	3%	4.9%	5.2%	67.6	69.9	93.9	102.4	90.4	98.9		
J.D. Wetherspoon	734.00	48.97	53.22	15.0	13.8	7.8	7.6	5%	6%	1.6%	1.6%	2243.1	2356.2	141.1	146.1	256.5	262.2		
Jet2	1299.00	187.52	199.17	6.9	6.5	1.5	1.3	9%	15%	1.3%	1.4%	7595.5	8223.8	432.0	440.2	770.2	810.0		
Kainos Group	703.00	32.66	38.15	20.9	18.4	12.3	10.6	6%	8%	2.5%	3.5%	395.6	413.9	51.9	58.9	59.8	67.8		
Kerry Group	72.55	5.01	5.52	14.5	13.2	11.1	10.1	5%	6%	2.1%	2.3%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8		
Kingfisher	358.90	22.02	23.73	16.3	15.1	6.4	5.9	5%	9%	3.5%	3.5%	12956.6	13317.9	658.7	673.6	1328.9	1399.4		
Kingspan	83.80	4.25	4.81	19.7	17.4	13.3	12.0	4%	4%	0.7%	0.8%	9653.7	10379.1	971.5	1069.5	1321.5	1436.5		
Lufthansa	9.18	1.24	1.54	7.4	6.0	7.2	6.4	16%	19%	4.0%	5.0%	41784.6	43685.5	2152.9	2614.6	3493.5	3976.2		
Manston's	59.00	9.02	10.21	6.5	5.8	7.2	6.7	15%	15%	0.0%	3.4%	908.6	930.0	166.0	174.5	211.6	220.0		
Mitchells & Butlers	291.50	31.57	33.42	9.2	8.7	6.2	5.8	5%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1		
Molten Ventures	456.00	33.24	46.11	13.7	9.9	11.4	8.2	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8		
Mondi	887.00	0.53	0.94	19.1	10.8	8.1	6.3	3%	3%	2.9%	4.6%	8105.0	8518.2	447.6	703.3	961.2	1217.3		
NCC Group	128.40	4.20	4.73	30.5	27.1	10.0	9.3	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3		
Origin Enterprises	4.20	0.54	0.57	7.7	7.4	5.0	4.8	6%	11%	4.3%	4.3%	2129.2	2173.2	86.3	89.1	120.8	125.4		
Permanent TSB	3.15	0.21	0.29	15.2	11.0	0.8	0.7			2.2%	3.8%	698.1	766.6	171.7	221.2				
Persimmon	1523.00	103.14	116.00	14.8	13.1	1.3	1.2	3%	7%	2.6%	2.8%	3861.4	4154.5	494.9	548.6	520.6	577.3		
Playtech	343.00	0.20	0.28	19.6	14.0	0.6	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6		
Rank Group	92.40	9.81	10.33	9.4	8.9	4.7	4.4	4%	4%	3.2%	3.6%	852.6	919.9	67.6	71.2	123.4	129.6		
Ryanair	26.58	2.09	2.33	12.7	11.4	7.2	6.4	8%	7%	1.6%	1.7%	15448.0	16196.0	2449.7	2663.1	3787.2	4048.8		
Smurfit Westrock	44.98	2.39	3.21	18.8	14.0	6.9	6.2	7%	8%	4.1%	4.4%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7		
SSP Group	198.60	13.90	16.80	14.3	11.8	6.7	6.4	5%	6%	2.5%	3.0%	3815.7	4005.7	304.0	331.4	650.8	681.4		
Tate & Lyle	398.00	41.43	45.31	9.6	8.8	7.5	7.0	6%	11%	5.1%	5.3%	2037.7	2077.5	290.8	304.2	421.3	434.3		
Taylor Wimpey	114.70	7.69	9.29	14.9	12.4	1.0	1.0	5%	6%	8.7%	9.2%	3941.4	4240.8	413.6	494.0	420.5	502.0		
Everplay Group	295.00	28.01	29.78	10.5	9.9	4.0	3.6	7%	7%	0.0%	0.0%	181.2	186.9	38.9	42.3	72.2	72.3		
Travis Perkins	698.00	60.01	FALSE	11.6	FALSE	5.9	FALSE	7%	FALSE	4.0%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE		
Trustpilot Group	135.20	0.04	0.06	45.6	32.6	15.0	10.3	5%	7%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9		
Unigipar	4.00	0.24	0.27	16.3	15.1	8.9	6.2	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6		
Vistry Group	715.60	46.20	55.16	15.5	13.0	5.0	4.1	16%	16%	0.0%	0.0%	4249.6	4647.3	371.9	426.5	484.0	558.5		
WH Smith	670.50	56.72	61.98	11.8	10.8	9.1	8.5	1%	6%	3.4%	3.8%	1615.2	1697.8	142.5	152.2	196.6	208.3		
Whitbread	2621.00																		
Wickes Group	247.50	21.84	26.24	11.3	9.4	5.3	4.7	6%	9%	4.8%	4.8%	1710.3	1779.7	81.7	93.0	206.0	222.8		
Wizz Air	1290.00	-0.12	0.05																