

Goodbody Market Commentary Metrics



24 March 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	9.12	0.84	0.92	10.8	9.9	1.3	1.3			5.9%	6.5%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	9.27	5.98	7.52	1.6	1.2	3.1	2.8	96%	125%	0.0%	0.0%	34552.6	36037.2	2206.4	2647.0	5404.1	6076.3
Applied Nutrition	205.00	11.41	12.82	18.0	16.0	12.2	10.5	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	163.50	21.43	22.68	7.6	7.2	5.6	5.4	15%	15%	6.1%	6.2%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	15.58	1.47	1.78	10.6	8.8	1.1	1.1			5.1%	6.1%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	267.10	29.14	35.88	9.2	7.4	0.5	0.4	nm	14%	6.4%	7.7%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2138.00	188.09	228.21	11.4	9.4	0.7	0.6	15%	9%	3.5%	4.3%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	3484.00	342.80	354.08	10.2	9.8	0.9	0.9	5%	12%	3.5%	1.9%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	319.00	29.89	35.36	10.7	9.0	5.6	5.0	9%	9%	5.0%	5.3%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bvies Technology	299.60	22.47	24.51	13.3	12.2	8.7	7.5	8%	8%	9.2%	10.1%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	103.80	0.11	0.11	11.4	11.1	7.2	7.5	5%	5%	6%	5.3%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.12	0.23	0.25	9.3	8.3	6.4	6.1	5%	10%	5.4%	5.9%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4190.00	2.92	3.14	16.6	15.4	10.1	9.3	4%	4%	2.7%	2.9%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6
Compass Group	2109.00	1.46	1.58	19.4	17.8	11.1	10.4	4%	5%	2.6%	2.8%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranwick	5080.00	297.22	315.87	17.1	16.1	8.6	8.1	3%	3%	2.1%	2.2%	2994.5	3175.4	227.9	240.1	325.1	344.0
CBH	104.42	583.63	654.68	17.9	15.9	10.3	9.6	10%	13%	1.5%	1.6%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	4524.00	421.97	505.84	10.7	8.9	6.5	6.0	13%	13%	4.8%	5.0%	14964.1	15168.2	521.6	549.4	788.0	829.2
Devolver Digital	23.50	0.18	0.67	179.1	47.3	9.5	6.9	7%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1378.50	1.59	1.59	11.6	11.6	10.7	10.4	8%	7%	3.0%	3.5%	19668.2	19214.0	5720.2	5573.1	6294.6	6098.5
Dole	14.43	148.96	158.44	9.7	9.1	4.7	4.3	9%	11%	2.6%	2.7%	9311.8	9501.3	298.6	309.3	408.1	418.9
easyJet	362.20	53.51	60.02	6.8	6.0	1.8	2.0	3%	3%	4.3%	4.7%	11134.7	11814.8	540.1	649.6	1415.8	1658.9
Entain	588.80	64.59	77.21	9.1	7.6	6.9	6.7	10%	12%	3.5%	3.7%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	30.10	17.65	FALSE	1.7	FALSE	4.3	FALSE	79%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FRD Holdings	16.50																
Fever-Tree Drinks	754.00	29.23	39.36	25.8	19.2	15.5	11.9	4%	6%	2.5%	2.7%	405.4	444.5	35.8	50.5	50.1	65.1
Flutter Entertainment	109.71	9.08	13.27	12.1	8.3	8.5	6.3	9%	13%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	159.60	13.41	15.15	11.9	10.5	6.5	5.7	14%	12%	5.2%	5.3%	403.4	434.0	43.6	47.6	63.8	69.3
Frontier Developments	346.50	849.11	0.00	0.4	nm	2.7	2.7	6%	8%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	650.00	43.47	48.57	15.0	13.4	8.0	7.6	4%	5%	3.6%	4.1%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	17710.00	547.81	585.95	32.3	30.2	20.0	18.6	3%	3%	2.8%	3.0%	625.9	671.8	238.5	254.4	283.9	305.1
Glanbia	19.26	1.47	1.60	13.1	12.1	9.8	8.9	6%	7%	2.9%	3.2%	3962.9	4096.6	400.1	431.8	525.8	558.4
Glenveagh Properties	1.94	0.21	0.22	9.2	8.8	10.5	9.6	14%	9%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6
Grafton Group	921.40	74.77	80.43	12.3	11.5	6.0	5.5	7%	7%	4.3%	4.6%	2623.2	2824.0	168.3	183.3	321.3	341.3
Greencoat Renewables	0.78	0.05	FALSE	15.2	FALSE	20.9	FALSE	17%	FALSE	8.8%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	240.00	16.21	23.18	14.8	10.4	8.5	6.1	5%	10%	2.0%	2.9%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1506.00	122.02	122.78	12.3	12.3	5.2	4.9	5%	7%	4.6%	4.6%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerston	316.20	22.46	26.19	14.1	12.1	0.8	0.8	12%	19%	8.0%	8.0%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	102.00	0.13	0.18	9.2	6.7	5.8	4.0	13%	20%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	797.50	51.39	57.32	15.5	13.9	8.7	8.1	6%	6%	2.9%	3.0%	2501.6	2598.8	372.0	405.0	535.2	571.6
IAG	361.30	0.68	0.78	6.1	5.4	3.3	3.1	12%	11%	2.5%	2.7%	34336.2	35530.4	4925.0	5127.7	7271.1	7737.9
Ibstock	103.00	6.26	7.53	16.5	13.7	7.9	7.1	5%	8%	3.1%	3.7%	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
IRIS REIT	0.98	0.14	0.15	7.1	6.4	0.7	0.7	3%	3%	5.4%	5.7%	67.6	69.9	93.9	102.4	90.4	98.9
J.D. Wetherspoon	568.00	46.02	51.49	12.3	11.0	7.2	6.9	6%	7%	2.1%	2.1%	2222.8	2319.4	132.0	139.1	247.2	255.0
Jet2	1113.00	190.10	189.04	5.9	5.9	0.7	0.6	6%	14%	1.6%	1.6%	7605.5	8182.1	429.5	414.8	777.4	783.6
Kainos Group	732.50	32.66	38.15	21.8	19.2	12.9	11.2	6%	7%	3.4%	3.4%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	64.75	5.01	5.52	12.9	11.7	10.1	9.2	6%	6%	2.4%	2.6%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingfisher	296.40	22.02	23.73	13.5	12.5	5.6	5.1	6%	10%	4.2%	4.2%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	71.30	4.18	4.62	17.0	15.4	11.5	10.5	5%	5%	0.9%	1.0%	8994.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	7.59	1.14	1.46	6.6	5.2	7.7	6.4	4%	18%	4.5%	5.8%	41422.2	43345.4	1903.2	2543.7	3086.8	3746.1
Manston's	53.10	9.02	10.21	5.9	5.2	7.0	6.6	16%	16%	0.0%	3.8%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	255.00	31.57	33.42	8.1	7.6	5.7	5.4	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	456.80	33.24	46.11	13.7	9.9	11.4	8.3	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	820.00	0.53	0.94	17.9	10.1	7.8	6.1	3%	3%	3.1%	5.0%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	116.20	4.20	4.73	27.6	24.6	9.1	8.5	4%	6%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.11	0.54	0.57	7.5	7.2	4.9	4.7	6%	11%	4.4%	4.6%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.94	0.21	0.29	14.2	10.3	0.7	0.7			2.4%	4.1%	698.1	766.6	171.7	221.2		
Persimmon	1142.50	103.14	116.00	11.1	9.8	0.9	0.9	5%	9%	3.5%	3.7%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	359.00	0.20	0.28	20.7	14.8	0.7	0.7	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	91.40	9.81	10.33	9.3	8.9	4.7	4.4	5%	8%	3.2%	3.6%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	24.50	2.08	2.18	11.8	11.2	6.6	6.1	9%	7%	1.7%	1.9%	15454.2	16224.6	2429.8	2484.4	3767.3	3870.1
Smurfit Westrock	38.19	2.39	3.21	16.0	11.9	6.3	5.6	8%	9%	4.8%	5.1%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	176.80	13.90	16.80	12.7	10.5	6.4	6.2	6%	6%	2.8%	3.3%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	329.80	41.43	45.31	8.0	7.3	6.8	6.4	7%	13%	6.1%	6.4%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	88.62	7.69	9.29	11.5	9.5	0.8	0.8	7%	8%	11.3%	11.8%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	259.00	27.01	29.27	9.6	8.8	3.5	3.0	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	560.00	60.01	FALSE	9.3	FALSE	5.1	FALSE	8%	FALSE	5.0%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	235.80	0.04	0.06	78.9	56.4	27.0	19.0	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unigipar	3.82	0.24	0.27	15.6	14.4	8.6	5.9	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	343.80	22.97	31.92	15.0	10.8	2.5	2.2	32%	32%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1
WH Smith	553.50	56.72	61.98	9.8	8.9	8.3	7.8	1%	7%	4.2%	4.5%	1615.2	1697.8	142.5	152.2	196.6	208.3
Whitbread	2330.00																
Wickes Group	210.50	21.84	26.24	9.6	8.0	4.9	4.3	7%	11%	5.7%	5.7%	1710.3	1779.7	81.7	93.0	206.0	222.8
Wizz Air	894.50	-0.54	-1.95	nm	nm	9.											