Goodbody Market Commentary Metrics

Goodbody

24 April 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	9.41	0.84	0.92	11.2	10.2	1.4	1.3			5.7%	6.3%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	9.58	3.85	5.51	2.5	1.7	3.6	3.3	74%	99%	0.0%	0.0%	34825.2	36319.9	1556.1	2033.0	4755.8	5466.2
Applied Nutrition	223.50	11.41	12.82	19.6	17.4	13.3	11.6	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Reta	174.00	21.43	22.68	8.1	7.7	5.8	5.7	14%	14%	5.7%	5.9%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	16.02	1.47	1.78	10.9	9.0	1.1	1.1			5.0%	5.9%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	262.00	29.14	35.88	9.0	7.3	0.4	0.4	nm	14%	6.5%	7.8%	5805.3	6417.2	609.3	726.2	613.7	727.7
Beauty Tech Group	314.00	21.04	24.57	14.9	12.8	7.0	5.6	8%	10%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	1973.00	183.78	213.85	10.7	9.2	0.6	0.6	4%	14%	3.8%	4.7%	3049.1	3233.9	325.0	364.3	328.1	367.3
Berkeley Group	3364.00	342.80	354.08	9.8	9.5	0.9	0.8	5%	13%	3.6%	1.9%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	314.80	30.07	34.93	10.5	9.0	5.7	5.2	8%	8%	5.0%	5.3%	1786.3	1862.1	142.0	158.9	281.4	302.7
Bytes Technology	308.40	22.47	24.51	13.7	12.6	9.0	7.8	8%	8%	8.9%	9.8%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	122.80	0.11	0.11	13.5	13.1	8.0	8.2	4%	5%	4.5%	4.5%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.15	0.23	0.25	9.4	8.4	6.5	6.2	5%	10%	5.4%	5.8%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4180.00	2.92	3.14	16.5	15.3	10.0	9.3	4%	4%	2.7%	2.9%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	29.79	1.46	1.58	20.5	18.8	11.6	10.9	4%	4%	2.4%	2.7%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranswick	5350.00	297.22	315.87	18.0	16.9	9.0	8.5	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0
CRH	117.16	583.63	654.68	20.1	17.9	11.4	10.5	9%	9%	1.3%	1.4%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	5180.00	421.97	505.84	12.3	10.2	7.4	6.8	11%	11%	4.2%	4.4%	14964.1	15168.2	521.6	559.4	788.0	829.2
Devolver Digital	21.50	0.18	0.67	165.4	43.7	8.3	6.0	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1475.60	1.59	1.61	12.6	12.4	11.1	10.6	7%	7%	2.8%	3.2%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	15.14	135.26	144.02	11.2	10.5	4.9	4.5	11%	12%	2.2%	2.4%	9488.2	9634.5	284.2	293.4	407.7	419.3
easyJet	367.60	53.51	60.02	6.9	6.1	1.9	2.0	3%	1%	4.2%	4.6%	11134.7	11814.8	540.1	649.6	1415.8	1658.9
Entain	591.80	60.21	71.83	9.8	8.2	6.7	6.2	10%	11%	3.5%	3.7%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	41.50	17.65	FALSE	2.4	FALSE	4.5	FALSE	57%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.60	1.47	1.57	11.3	10.6	1.3	1.3										
Fever-Tree Drinks	841.50	29.14	39.37	28.9	21.4	17.5	13.4	4%	6%	2.2%	2.3%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	106.68	9.08	13.27	11.8	8.0	8.3	6.2	9%	13%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	158.60	13.41	15.15	11.8	10.5	6.4	5.7	14%	12%	5.3%	5.9%	403.4	434.0	43.6	47.6	63.8	69.3
Frontier Developments	355.50	849.11	0.00	0.4	nm	2.8	2.8	6%	8%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	644.00	43.47	48.57	14.8	13.3	7.9	7.6	4%	5%	3.6%	4.0%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	19325.00	547.81	585.95	35.3	33.0	21.8	20.3	3%	3%	2.5%	2.7%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	20.48	1.47	1.60	13.9	12.8	10.4	9.4	6%	7%	2.7%	3.0%	3962.9	4096.6	400.1	431.8	525.8	558.4
Glenveagh Properties	2.02	0.21	0.22	9.7	9.0	10.9	9.5	15%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	915.30	74.77	80.43	12.2	11.4	6.0	5.5	7%	7%	4.4%	4.6%	2623.2	2724.0	168.3	183.3	321.3	341.3
Greencoat Renewables	0.73	0.05	FALSE	14.4	FALSE	20.4	FALSE	18%	FALSE	9.4%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	253.80	18.17	22.96	14.0	11.1	8.8	6.3	6%	9%	1.1%	1.8%	3498.9	4334.8	225.8	317.8	331.2	447.1
Greggs	1608.50	122.02	122.78	13.2	13.1	5.5	5.2	4%	6%	4.3%	4.3%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	334.80	22.65	24.70	14.8	13.6	0.8	0.8	8%	9%	5.3%	5.6%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	113.00	0.13	0.18	10.2	7.4	6.6	4.6	12%	18%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	828.50	51.39	57.32	16.1	14.5	9.0	8.4	6%	5%	2.8%	2.9%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	382.50	0.68	0.78	6.5	5.7	3.4	3.2	12%	10%	2.4%	2.5%	34336.2	35530.4	4925.0	5172.7	7271.1	7737.9
Ibstock	106.40	6.26	7.53	17.0	14.1	8.1	7.3	5%	8%	3.0%	3.5%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.42	0.49	0.54	13.1	11.9	7.6	6.8	4%	12%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.04	0.13	0.15	8.1	7.0	0.7	0.7	2%	3%	5.5%	5.5%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	605.50	46.03	51.49	13.2	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	1135.00	187.33	168.11	6.1	6.8	0.7	1.1	11%	8%	1.6%	1.6%	7602.9	8161.4	431.6	361.9	771.2	777.8
Kainos Group	834.00	33.13	43.31	25.2	19.3	15.9	11.8	7%	8%	3.0%	3.0%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	67.60	5.01	5.51	13.5	12.3	10.4	9.5	6%	6%	2.3%	2.5%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4
Kingfisher	292.10	22.02	23.73	13.3	12.3	5.5	5.1	6%	11%	4.2%	4.2%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	79.00	4.18	4.62	18.9	17.1	12.5	11.4	4%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	7.45	1.08	1.33	6.9	5.6	7.9	6.6	18%	24%	4.3%	5.4%	41488.5	43955.2	1801.9	2341.3	2985.7	3607.3
Marston's	50.20	9.02	10.21	5.6	4.9	6.9	6.5	17%	17%	0.0%	4.0%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	261.00	31.57	33.42	8.3	7.8	5.8	5.4	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	536.50	33.24	46.11	16.1	11.6	13.3	9.6	1%	3%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8
Mondi	841.80	0.53	0.94	18.3	10.3	7.9	6.1	3%	5%	3.0%	4.8%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	118.00	4.20	4.73	28.1	24.9	9.3	8.6	4%	6%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.50	0.54	0.57	8.3	7.9	5.2	5.0	5%	10%	4.0%	4.2%	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	1121.00	102.91	113.64	10.9	9.9	1.0	0.9	nm	7%	3.6%	3.8%	4017.7	4280.1	502.4	550.8	526.6	578.2
Playtech	401.80	0.22	0.29	20.8	15.8	0.7	0.7	3%	5%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	101.60	9.81	10.33	10.4	9.8	5.1	4.8	4%	7%	2.9%	3.3%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	23.48	2.06	2.16	11.4	10.9	6.4	5.9	10%	7%	1.8%	2.0%	15481.8	16340.1	2416.6	2463.7	3754.1	3849.4
Smurfit Westrock	3019.00	2.39	3.21	17.0	12.7	6.5	5.8	7%	8%	4.5%	4.8%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	181.70	13.90	16.80	13.1	10.8	6.5	6.3	6%	6%	2.7%	3.2%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	355.20	40.87	43.21	8.7	8.2	6.0	5.6	7%	12%	5.7%	6.0%	2014.2	2013.8	287.5	292.1	417.9	422.2
Taylor Wimpey	84.42	7.69	9.29	11.0	9.1	0.7	0.7	7%	9%	11.8%	12.4%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	254.50	27.01	29.27	9.4	8.7	3.5	2.9	7%	8%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	559.00	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	251.20	0.04	0.06	84.8	60.6	29.2	20.6	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.08	0.26	0.28	15.7	14.6	9.2	6.4	nm	10%	0.5%	0.5%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	340.60	22.97	31.92	14.8	10.7	2.4	2.2	32%	10%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1
WH Smith	571.00	53.43	60.06	10.7	9.5	6.2	5.6	0%	6%	3.8%	4.3%	1607.2	1683.6	136.1	148.7	189.9	204.2
Whitbread	2429.00																
Wickes Group	207.50	21.94	26.33	9.5	7.9	5.1	4.5	4%	10%	5.8%	6.7%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	905.00	-0.54	-1.95	nm	nm	9.1	5.8	41%	65%	0.0%	0.0%	5804.3	6899.2	28.2	-118.9	1168.3	1190.9

Closing prices as of: *23/04/2026*