

Goodbody Market Commentary Metrics



24 July 2026																			
Company	Price		EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA		
	1c		2026	2027	2026	2027	2026	2027	2026		2026	2027	2026	2027	2026	2027	2026	2027	
AIB Group	10.64		0.85	0.93	12.5	11.5	1.6	1.5			5.1%	5.5%	4586.0	4739.1	2235.3	2331.2			
Air France-KLM	11.24		4.12	5.25	2.7	2.1	3.5	3.4	64%	74%	0.0%	0.0%	35376.7	35669.4	1557.1	1872.3	4760.9	5235.7	
Applied Nutrition	334.50		11.97	13.20	27.9	25.4	19.7	17.0	1%	2%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2	
B&M European Value Ret	212.20		22.22	22.93	10.2	9.3	6.5	5.9	12%	9%	4.2%	5.2%	5775.0	5999.3	359.0	371.6	458.0	470.3	
Bank of Ireland	18.21		1.49	1.81	12.3	10.1	1.3	1.2			4.4%	5.2%	4260.6	4526.2	1859.7	2061.6			
Barratt Redrow	290.50		29.61	24.94	9.8	11.6	0.5	0.5	9%	7%	5.7%	0.3%	6074.1	6319.0	588.5	474.5	604.8	492.8	
Beauty Tech Group	354.00		24.23	27.79	14.6	12.7	7.2	5.8	8%	10%	0.0%	0.0%	170.9	190.1	32.8	37.4	45.4	50.9	
Bellway	1940.00		182.79	156.47	10.6	12.4	0.6	0.6	3%	13%	3.9%	4.8%	3089.5	3137.6	323.4	271.9	326.4	275.0	
Berkeley Group	3370.00		334.63	290.34	10.1	11.6	0.9	0.9	4%	8%	3.6%	1.9%	2258.6	2014.5	441.3	375.1	425.6	358.4	
Breedon Group	304.60		29.54	33.09	10.3	9.2	5.8	5.2	10%	11%	5.2%	5.4%	1792.6	1869.8	142.0	154.8	282.1	299.4	
Bytes Technology	416.60		22.47	24.51	18.5	17.0	12.9	11.3	6%	6%	6.6%	7.2%	224.8	243.9	63.7	71.2	65.5	73.2	
C & C Group	101.00		0.10	0.10	16.6	11.8	9.1	7.6	0%	6%	3.4%	4.9%	1569.8	1497.8	70.5	71.2	104.3	105.0	
Cairn Homes	2.46		0.23	0.25	10.8	9.7	7.6	7.1	4%	8%	4.7%	5.1%	1065.6	1204.2	181.7	200.5	183.8	203.1	
Coca-Cola HBC	4816.00		2.93	3.16	19.3	17.8	11.4	10.5	4%	4%	2.3%	2.5%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2	
Compass Group	30.46		1.48	1.63	20.6	18.7	11.4	10.5	4%	4%	2.4%	2.7%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9	
Cranswick	5450.00		301.74	322.02	17.0	16.9	8.9	8.3	3%	3%	2.2%	2.2%	2982.5	3120.9	232.8	250.6	336.4	358.6	
CRH	98.02		585.55	660.57	16.7	14.8	9.7	8.9	10%	11%	1.6%	1.7%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4	
DCC	6290.00		437.42	511.23	11.0	12.3	6.3	7.4	12%	9%	4.5%	3.6%	15441.9	16336.2	494.4	563.5	778.3	807.0	
Devolver Digital	17.00		0.18	0.67	128.9	34.0	5.2	3.8	9%	11%	0.0%	0.0%	109.6	118.6	1.1	4.2	8.7	8.8	
Diageo	1540.50		1.59	1.56	12.9	13.2	11.3	11.0	7%	6%	2.7%	2.9%	19670.7	18899.7	5723.5	5422.8	6298.0	5955.5	
Dole	14.05		133.14	142.18	10.6	9.9	4.6	4.2	10%	13%	2.4%	2.5%	9794.4	9945.2	280.4	290.0	404.0	415.9	
easyJet	601.00		8.17	18.19	73.6	33.0	5.1	4.6	nm	nm	2.6%	2.8%	10599.5	11668.6	60.3	235.6	919.7	1255.2	
Entain	548.00		60.21	71.83	9.1	7.6	6.5	6.0	11%	12%	3.8%	4.0%	5574.3	5794.4	869.4	980.2	1162.3	1237.4	
Evoke	43.30		17.65	FALSE	2.5	FALSE	4.5	FALSE	55%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE	
FBD Holdings	17.40		1.47	1.57	11.8	11.1	1.3	1.3											
Fever-Tree Drinks	829.00		29.14	39.37	28.4	21.1	17.2	13.2	4%	6%	2.2%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7	
Flutter Entertainment	99.50		5.91	9.45	16.8	10.5	9.8	7.2	4%	9%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5	
Forterra	133.00		11.51	13.18	11.6	10.1	6.3	5.5	15%	13%	5.4%	6.2%	390.7	420.3	38.1	42.0	57.6	63.0	
Frontier Developments	403.00		849.11	0.00	0.5	nm	3.1	3.2	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3	
Fuller, Smith & Turner	750.00		47.18	52.27	13.3	14.3	7.3	8.2	7%	6%	3.4%	3.1%	397.8	413.3	40.8	48.3	74.6	77.7	
Games Workshop Group	19860.00		547.81	585.95	36.3	33.9	22.5	20.9	3%	3%	2.5%	2.6%	625.0	671.8	238.5	254.4	281.9	305.1	
Glanbia	25.43		1.50	1.63	16.9	15.6	12.4	11.2	5%	6%	1.9%	2.0%	4106.8	4250.4	409.8	442.8	535.0	568.8	
Glenveagh Properties	2.36		0.21	0.23	11.2	10.3	12.8	11.4	13%	9%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9	
Grafton Group	941.70		76.63	84.53	12.3	11.1	5.9	5.4	8%	7%	4.1%	4.2%	2685.0	2822.0	169.5	182.1	322.5	340.1	
Greencoast Renewables	0.77		0.05	FALSE	15.0	FALSE	20.8	FALSE	17%	FALSE	9.0%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE	
Greencore	243.40		20.07	24.02	12.1	10.1	7.8	5.8	9%	11%	1.2%	2.0%	3374.4	4091.1	193.2	248.5	336.3	429.9	
Greggs	1560.00		122.24	122.97	12.8	12.7	5.4	5.1	5%	7%	4.4%	4.4%	2288.8	2415.5	190.0	191.5	372.7	390.5	
Hammerson	365.40		22.44	24.20	16.3	15.1	0.9	0.8	6%	8%	4.8%	5.2%	214.4	230.6	176.6	189.6	176.5	189.5	
Hostelworld Group	105.00		0.13	0.18	9.6	7.0	6.2	4.2	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9	
Howden Joinery	770.50		52.18	56.75	14.8	13.6	8.7	8.0	6%	6%	3.0%	3.1%	2576.4	2737.9	390.3	426.0	553.5	596.1	
IAG	422.40		0.59	0.76	8.3	6.5	4.0	3.5	11%	12%	2.1%	2.2%	34714.5	36409.9	4372.5	5043.3	6773.0	7608.5	
Ibstock	93.15		5.69	7.33	16.4	12.7	7.8	6.8	5%	9%	3.1%	3.9%	390.5	420.2	33.1	41.6	67.8	75.3	
ICG	6.30		0.49	0.54	12.9	11.7	7.5	6.7	4%	13%	2.7%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1	
IRIS REIT	11.12		0.13	0.15	8.8	7.6	0.8	0.8	2%	2%	5.1%	5.1%	67.6	70.0	90.2	101.6	87.6	99.1	
J D Wetherspoon	698.50		39.18	48.69	17.8	14.3	7.9	7.5	13%	8%	1.7%	1.7%	2222.7	2324.0	120.9	131.3	235.9	246.8	
Jet2	1444.00		190.52	113.44	7.6	12.7	1.1	2.2	21%	nm	1.2%	1.2%	7618.1	8026.6	437.5	226.8	777.1	618.5	
Kainos Group	802.50		33.13	43.31	24.2	18.5	15.2	11.3	7%	8%	3.1%	3.1%	430.3	499.9	45.9	61.9	53.8	70.8	
Kerry Group	80.20		5.09	5.66	15.8	14.2	11.9	10.8	5%	5%	1.9%	2.1%	6830.3	7117.6	943.0	1030.3	1247.3	1336.4	
Kingfisher	296.70		23.42	25.14	12.1	11.8	5.3	5.3	10%	9%	4.4%	4.2%	12945.0	13264.7	651.0	686.5	1327.0	1328.3	
Kingspan	74.95		4.14	4.52	18.1	16.6	11.7	10.6	5%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6	
Lufthansa	8.45		1.09	1.27	7.7	6.7	7.6	7.0	18%	17%	3.9%	4.5%	42361.2	42819.1	1828.5	2237.6	3208.2	3539.7	
Marston's	49.60		8.78	9.99	5.7	5.0	7.0	6.6	16%	16%	0.0%	4.0%	900.3	916.6	164.6	170.4	210.0	215.8	
Mitchells & Butlers	261.00		31.43	33.14	8.3	7.9	5.9	5.6	5%	6%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3	
Molten Ventures	594.50		59.68	42.69	10.0	13.9	7.7	10.9	4%	3%	0.0%	0.0%	168.7	128.0	138.4	96.8	138.5	96.9	
Mondi	726.60		0.45	0.72	19.1	11.8	7.7	6.4	3%	3%	2.9%	4.2%	8180.1	8523.7	399.5	578.5	917.9	1092.9	
NCC Group	141.80		4.20	4.73	33.7	30.0	10.9	10.2	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3	
Origin Enterprises	4.36		0.54	0.55	8.1	7.9	5.6	5.1	nm	12%	4.2%	4.4%	2166.0	2268.3	86.3	87.5	118.2	121.3	
Permanent TSB	3.02		0.23	0.27	13.4	11.1	0.7	0.7			2.3%	4.0%	708.5	762.2	191.4	219.9			
Persimmon	1079.00		94.20	101.01	11.5	10.7	0.9	0.9	nm	6%	3.7%	3.9%	3905.9	4149.7	463.6	495.1	487.7	522.3	
Playtech	360.00		0.22	0.29	18.9	14.3	0.7	0.7	3%	6%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2	
Rank Group	93.30		9.81	10.33	9.5	9.0	4.8	4.5	4%	8%	3.2%	3.5%	852.6	919.9	67.6	71.2	123.4	129.6	
Ryanair	23.32		2.12	1.76	11.9	13.2	6.5	6.5	6%	5%	1.7%	2.0%	15544.3	15973.6	2459.2	2013.4	3832.6	3632.9	
Smurfit Westrock	43.71		2.17	2.83	20.1	15.2	7.0	6.4	7%	7%	4.2%								