Goodbody Market Commentary Metrics

Goodbody

25 June 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	10.38	0.85	0.93	12.2	11.2	1.5	1.5			5.2%	5.7%	4586.0	4739.1	2235.3	2331.2		
Air France-KLM	13.55	3.90	8.34	3.5	1.6	3.8	2.9	52%	85%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2
Applied Nutrition	307.00	11.97	13.20	25.6	23.3	18.1	15.6	1%	3%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2
B&M European Value Reta	210.40	22.22	22.93	10.2	9.2	6.5	5.8	12%	9%	4.2%	5.2%	5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	17.74	1.47	1.78	12.1	10.0	1.3	1.2			4.5%	5.4%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	281.00	29.33	24.65	9.6	11.4	0.5	0.5	nm	12%	5.9%	7.3%	5777.8	6093.5	593.6	508.7	598.0	510.8
Beauty Tech Group	347.00	21.04	24.57	16.5	14.1	7.9	6.4	7%	9%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	1977.00	182.79	156.47	10.8	12.6	0.6	0.6	3%	13%	3.8%	4.7%	3089.5	3137.6	323.4	271.9	326.4	275.0
Berkeley Group	3734.00	334.63	290.34	11.2	12.9	1.0	1.0	3%	7%	3.2%	1.7%	2258.6	2014.5	441.3	375.1	425.6	358.4
Breedon Group	303.40	30.07	34.93	10.1	8.7	5.5	5.0	9%	8%	5.2%	5.5%	1786.3	1862.1	142.0	158.9	281.4	302.7
Bytes Technology	370.80	22.47	24.51	16.5	15.1	11.3	9.8	7%	6%	7.4%	8.1%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	96.00	0.10	0.10	16.6	11.1	9.1	7.3	0%	6%	3.4%	5.2%	1569.8	1497.8	70.5	71.2	104.3	105.0
Cairn Homes	2.43	0.23	0.25	10.7	9.5	7.5	7.0	4%	8%	4.7%	5.1%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4816.00	2.92	3.14	19.1	17.8	11.5	10.6	4%	4%	2.3%	2.5%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	32.45	1.48	1.63	22.0	19.9	12.1	11.1	4%	4%	2.3%	2.5%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5610.00	301.74	322.02	17.0	17.4	8.9	8.6	3%	3%	2.2%	2.1%	2982.5	3120.9	232.8	250.6	336.4	358.6
CRH	112.02	585.55	660.57	19.1	17.0	10.8	10.0	9%	10%	1.4%	1.4%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4
DCC	6205.00	437.42	511.23	11.0	12.1	6.3	7.3	12%	9%	4.5%	3.7%	15441.9	16336.2	494.4	563.5	778.3	807.0
Devolver Digital	17.50	0.18	0.67	131.0	34.6	5.4	3.9	9%	11%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1580.00	1.59	1.61	13.1	12.9	11.4	10.9	7%	6%	2.6%	3.1%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	14.19	133.14	142.18	10.7	10.0	4.6	4.2	10%	12%	2.3%	2.5%	9794.4	9945.2	280.4	290.0	404.0	415.9
easyJet	539.60	10.49	28.37	51.4	19.0	4.2	3.8	nm	nm	2.9%	3.2%	10701.0	11641.6	72.6	330.0	995.0	1349.6
Entain	554.40	60.21	71.83	9.2	7.7	6.5	6.0	11%	12%	3.7%	3.9%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	47.30	17.65	FALSE	2.7	FALSE	4.5	FALSE	50%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.80	1.47	1.57	11.4	10.7	1.3	1.3										
Fever-Tree Drinks	821.50	29.14	39.37	28.2	20.9	17.1	13.1	4%	6%	2.3%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	97.73	5.91	9.45	16.5	10.3	9.7	7.1	4%	9%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5
Forterra	136.40	11.51	13.18	11.8	10.3	6.4	5.6	14%	13%	5.2%	6.0%	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	718.00	47.18	52.27	13.3	13.7	7.3	7.9	7%	6%	3.4%	3.2%	397.8	413.3	40.8	48.3	74.6	77.7
Games Workshop Group	21800.00	547.81	585.95	39.8	37.2	24.7	22.9	3%	3%	2.3%	2.4%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	26.56	1.50	1.63	17.7	16.3	12.9	11.8	5%	5%	1.8%	2.0%	4107.8	4242.3	409.9	441.6	535.1	567.7
Glenveagh Properties	2.52	0.21	0.23	11.9	11.0	13.7	12.2	12%	9%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	906.60	76.25	86.75	11.9	10.5	5.7	5.1	8%	7%	4.2%	4.4%	2705.7	2857.1	169.5	189.5	322.5	347.5
Greencoat Renewables	0.74	0.05	FALSE	14.4	FALSE	20.4	FALSE	18%	FALSE	9.3%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	197.90	18.43	23.22	10.7	8.5	7.6	5.5	9%	12%	1.4%	2.3%	3346.8	4085.5	178.1	240.0	326.0	428.5
Greggs	1664.00	122.02	122.78	13.6	13.6	5.7	5.4	4%	6%	4.1%	4.1%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	368.60	22.65	24.70	16.3	14.9	0.9	0.9	7%	9%	4.8%	5.1%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	109.50	0.13	0.18	9.9	7.2	6.4	4.4	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	846.50	51.39	57.32	16.5	14.8	9.2	8.6	6%	5%	2.7%	2.8%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	480.90	0.55	0.72	10.2	7.7	4.7	4.1	7%	8%	1.9%	2.0%	34427.4	35954.7	4086.6	4830.7	6487.1	7396.0
Ibstock	94.80	6.26	7.53	15.2	12.6	7.4	6.7	6%	9%	3.4%	4.0%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.20	0.49	0.54	12.7	11.5	7.4	6.6	4%	13%	2.8%	2.9%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.14	0.13	0.15	8.9	7.7	0.8	0.8	2%	2%	5.1%	5.0%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	699.50	44.32	53.00	15.8	13.2	7.9	7.5	6%	7%	1.7%	1.7%	2226.2	2326.6	128.8	139.2	243.9	255.0
Jet2	1334.00	190.52	113.44	7.0	11.8	0.8	1.9	22%	nm	1.3%	1.3%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	780.00	33.13	43.31	23.5	18.0	14.7	10.9	7%	8%	3.2%	3.2%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	80.90	5.01	5.51	16.1	14.7	12.1	11.1	5%	5%	1.9%	2.1%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4
Kingfisher	288.40	23.42	25.14	12.1	11.5	5.3	5.2	10%	10%	4.4%	4.3%	12945.0	13264.7	651.0	686.5	1327.0	1328.3
Kingspan	83.90	4.18	4.62	20.1	18.1	13.2	12.1	4%	4%	0.7%	0.8%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	9.60	1.06	1.52	9.0	6.3	8.5	6.6	15%	18%	3.3%	4.8%	42111.9	43620.3	1779.7	2631.1	3065.1	3942.6
Marston's	51.20	8.78	9.99	5.8	5.1	7.1	6.7	16%	15%	0.0%	3.9%	900.3	916.6	164.6	170.4	210.0	215.8
Mitchells & Butlers	245.50	31.43	33.14	7.8	7.4	5.7	5.4	5%	6%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3
Molten Ventures	575.00	59.68	42.69	9.6	13.5	7.5	10.5	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9
Mondi	707.20	0.45	0.72	18.4	11.4	7.5	6.3	3%	4%	3.0%	4.4%	8180.1	8523.7	399.5	578.5	917.9	1092.9
NCC Group	122.40	4.20	4.73	29.1	25.9	9.6	8.9	4%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.10	0.54	0.57	7.5	7.2	4.9	4.7	6%	11%	4.4%	4.7%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.97	0.23	0.27	13.2	10.9	0.7	0.7			2.4%	4.0%	708.5	762.2	191.4	219.9		
Persimmon	1092.50	86.62	92.96	12.6	11.8	0.9	0.9	nm	5%	3.7%	3.9%	3865.0	4106.3	429.3	458.7	453.3	485.8
Playtech	301.20	0.22	0.29	15.6	11.9	0.6	0.5	4%	7%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	97.50	9.81	10.33	9.9	9.4	4.9	4.6	4%	8%	3.0%	3.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	27.08	2.12	1.85	11.9	14.6	6.5	7.7	6%	5%	1.7%	1.7%	15544.3	16091.1	2459.2	2148.1	3832.6	3570.1
Smurfit Westrock	46.56	2.17	2.83	21.4	16.4	7.3	6.7	6%	7%	3.9%	4.2%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	190.50	13.90	16.67	13.7	11.4	6.7	6.4	5%	6%	2.6%	3.1%	3825.4	3979.6	297.7	330.3	635.0	677.9
Tate & Lyle	556.50	40.50	36.60	11.2	15.2	7.4	8.5	8%	7%	4.4%	3.6%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	82.90	5.27	6.09	15.7	13.6	0.7	0.7	2%	14%	7.2%	8.4%	3767.5	3993.3	287.3	325.9	293.6	333.4
Everplay Group	229.50	27.01	29.27	8.5	7.8	3.0	2.5	8%	9%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	566.00	60.01	FALSE	9.4	FALSE	5.2	FALSE	8%	FALSE	4.9%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	236.00	0.04	0.06	77.6	55.4	26.5	18.7	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.57	0.26	0.28	17.6	16.3	10.1	7.2	nm	9%	0.4%	0.4%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	256.80	43.67	61.44	5.9	4.2	2.8	1.9	33%	6%	0.0%	0.0%	4301.4	4532.5	290.8	356.6	356.9	446.5
WH Smith	396.60	39.76	37.96	10.0	10.4	5.5	5.3	nm	4%	0.0%	0.0%	1589.6	1610.8	111.4	115.5	164.7	168.6
Whitbread	2550.00																
Wickes Group	182.60	21.94	26.33	8.3	6.9	4.8	4.2	5%	11%	6.6%	7.7%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	1238.00	0.01	-2.58	1426.2	nm	8.0	6.5	47%	31%	0.0%	0.0%	5691.4	6581.2	139.7	-210.0	1318.3	1085.0

Closing prices as of: *24/06/2026*