Goodbody Market Commentary Metrics

Goodbody

26 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	10.54	0.85	0.93	12.4	11.3	1.6	1.5			5.1%	5.6%	4586.0	4739.1	2235.3	2331.2		
Air France-KLM	13.86	3.90	8.34	3.6	1.7	3.8	2.9	50%	83%	0.0%	0.0%	35417.6	36962.0	1490.2	2817.4	4694.3	6259.2
Applied Nutrition	309.50	11.97	13.20	25.8	23.5	18.3	15.7	1%	3%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2
B&M European Value Reta	206.80	22.22	22.93	10.2	9.0	6.5	5.8	12%	9%	4.2%	5.3%	5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	17.76	1.47	1.78	12.1	10.0	1.3	1.2			4.5%	5.3%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	294.00	29.33	24.65	10.0	11.9	0.5	0.5	nm	12%	5.6%	7.0%	5777.8	6093.5	593.6	508.7	598.0	510.8
Beauty Tech Group	349.00	21.04	24.57	16.6	14.2	8.0	6.4	7%	9%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	2014.00	182.79	156.47	11.0	12.9	0.7	0.6	3%	13%	3.7%	4.6%	3089.5	3137.6	323.4	271.9	326.4	275.0
Berkeley Group	3752.00	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	313.00	30.07	34.93	10.4	9.0	5.6	5.1	8%	8%	5.0%	5.3%	1786.3	1862.1	142.0	158.9	281.4	302.7
Bytes Technology	368.20	22.47	24.51	16.4	15.0	11.2	9.7	7%	6%	7.4%	8.2%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	95.40	0.10	0.10	16.6	11.0	9.1	7.3	0%	6%	3.4%	5.2%	1569.8	1497.8	70.5	71.2	104.3	105.0
Cairn Homes	2.48	0.23	0.25	10.9	9.7	7.7	7.2	4%	8%	4.6%	5.0%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4760.00	2.92	3.14	18.9	17.6	11.4	10.5	4%	4%	2.3%	2.5%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	32.22	1.48	1.63	21.8	19.8	12.0	11.1	4%	4%	2.3%	2.5%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5630.00	301.74	322.02	17.0	17.5	8.9	8.6	3%	3%	2.2%	2.1%	2982.5	3120.9	232.8	250.6	336.4	358.6
CRH	113.05	585.55	660.57	19.3	17.1	10.9	10.1	9%	10%	1.4%	1.4%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4
DCC	6235.00	437.42	511.23	11.0	12.2	6.3	7.4	12%	9%	4.5%	3.6%	15441.9	16336.2	494.4	563.5	778.3	807.0
Devolver Digital	17.50	0.18	0.67	131.6	34.8	5.4	4.0	9%	11%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1562.00	1.59	1.61	13.0	12.8	11.3	10.8	7%	6%	2.7%	3.1%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	13.80	133.14	142.18	10.4	9.7	4.5	4.1	10%	13%	2.4%	2.6%	9794.4	9945.2	280.4	290.0	404.0	415.9
easyJet	574.20	10.49	28.37	54.7	20.2	4.5	4.0	nm	nm	2.7%	3.0%	10701.0	11641.6	72.6	330.0	995.0	1349.6
Entain	569.60	60.21	71.83	9.5	7.9	6.6	6.1	10%	12%	3.6%	3.8%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	46.90	17.65	FALSE	2.7	FALSE	4.5	FALSE	51%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.65	1.47	1.57	11.3	10.6	1.3	1.3										
Fever-Tree Drinks	825.50	29.14	39.37	28.3	21.0	17.2	13.1	4%	6%	2.3%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	95.34	5.91	9.45	16.1	10.1	9.6	7.0	4%	9%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5
Forterra	136.80	11.51	13.18	11.9	10.4	6.4	5.6	14%	13%	5.2%	6.0%	390.7	420.3	38.1	42.0	57.6	63.0
Frontier Developments	399.50	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	730.00	47.18	52.27	13.3	14.0	7.3	8.0	7%	6%	3.4%	3.2%	397.8	413.3	40.8	48.3	74.6	77.7
Games Workshop Group	21700.00	547.81	585.95	39.6	37.0	24.6	22.8	3%	3%	2.3%	2.4%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	26.92	1.50	1.63	17.9	16.5	13.1	11.9	5%	5%	1.8%	1.9%	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	918.00	76.25	86.75	12.0	10.6	5.8	5.2	8%	7%	4.2%	4.3%	2705.7	2857.1	169.5	189.5	322.5	347.5
Greencoat Renewables	0.73	0.05	FALSE	14.3	FALSE	20.4	FALSE	18%	FALSE	9.4%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	199.70	18.43	23.22	10.8	8.6	7.7	5.6	9%	12%	1.4%	2.3%	3346.8	4085.5	178.1	240.0	326.0	428.5
Greggs	1661.00	122.02	122.78	13.6	13.5	5.7	5.4	4%	6%	4.2%	4.2%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	370.80	22.65	24.70	16.4	15.0	0.9	0.9	7%	8%	4.8%	5.1%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	110.50	0.13	0.18	10.0	7.3	6.5	4.5	12%	18%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	867.50	51.39	57.32	16.9	15.1	9.4	8.8	5%	5%	2.7%	2.8%	2501.6	2598.9	372.0	405.0	535.2	571.6
IAG	488.00	0.55	0.72	10.3	7.9	4.7	4.2	7%	8%	1.8%	2.0%	34427.4	35954.7	4086.6	4830.7	6487.1	7396.0
Ibstock	95.05	6.26	7.53	15.2	12.6	7.4	6.7	6%	9%	3.3%	4.0%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.32	0.49	0.54	12.9	11.8	7.5	6.7	4%	13%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1
IRES REIT	1.16	0.13	0.15	9.0	7.8	0.8	0.8	2%	2%	5.0%	4.9%	67.6	70.0	90.2	101.6	87.6	99.1
J D Wetherspoon	704.00	44.32	53.00	15.9	13.3	7.9	7.5	6%	7%	1.7%	1.7%	2226.2	2326.6	128.8	139.2	243.9	255.0
Jet2	1372.00	190.52	113.44	7.2	12.1	0.9	2.0	22%	nm	1.3%	1.3%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kainos Group	765.00	33.13	43.31	23.1	17.7	14.4	10.7	7%	9%	3.2%	3.3%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	80.65	5.01	5.51	16.1	14.6	12.1	11.0	5%	5%	1.9%	2.1%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4
Kingfisher	293.20	23.42	25.14	12.1	11.7	5.3	5.3	10%	9%	4.4%	4.2%	12945.0	13264.7	651.0	686.5	1327.0	1328.3
Kingspan	84.20	4.18	4.62	20.1	18.2	13.2	12.1	4%	4%	0.7%	0.8%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	9.82	1.06	1.52	9.2	6.5	8.6	6.7	15%	17%	3.2%	4.6%	42111.9	43620.3	1779.7	2631.1	3065.1	3942.6
Marston's	50.90	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	246.00	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	578.50	59.68	42.69	9.7	13.6	7.5	10.6	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9
Mondi	719.40	0.45	0.72	18.7	11.6	7.6	6.3	3%	4%	3.0%	4.3%	8180.1	8523.7	399.5	578.5	917.9	1092.9
NCC Group	121.20	4.20	4.73	28.8	25.6	9.5	8.9	4%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.25	0.54	0.57	7.8	7.5	5.0	4.8	6%	11%	4.3%	4.5%	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	1128.50	86.62	92.96	13.0	12.1	1.0	0.9	nm	5%	3.5%	3.8%	3865.0	4106.3	429.3	458.7	453.3	485.8
Playtech	297.40	0.22	0.29	15.5	11.7	0.6	0.5	4%	7%	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	27.40	2.12	1.91	11.9	14.4	6.5	7.7	6%	5%	1.7%	1.7%	15544.3	16056.6	2459.2	2214.7	3832.6	3636.6
Smurfit Westrock	46.84	2.17	2.83	21.6	16.5	7.3	6.7	6%	7%	3.9%	4.2%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8
SSP Group	192.40	13.90	16.67	13.8	11.5	6.8	6.4	5%	6%	2.6%	3.0%	3825.4	3979.6	297.7	330.3	635.0	677.9
Tate & Lyle	554.00	40.50	36.60	11.2	15.1	7.4	8.5	8%	7%	4.4%	3.6%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	84.58	5.27	6.09	16.0	13.9	0.8	0.7	2%	13%	7.1%	8.3%	3767.5	3993.3	287.3	325.9	293.6	333.4
Everplay Group	230.50	27.01	29.27	8.5	7.9	3.0	2.5	8%	9%	0.0%	0.0%	175.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	581.50	60.01	FALSE	9.7	FALSE	5.2	FALSE	8%	FALSE	4.8%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	236.80	0.04	0.06	78.2	55.8	26.8	18.8	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.60	0.26	0.28	17.7	16.4	10.1	7.3	nm	9%	0.4%	0.4%	3210.0	3357.8	107.1	115.9	147.7	165.8
Vistry Group	274.20	43.67	61.44	6.3	4.5	3.0	2.0	31%	5%	0.0%	0.0%	4301.4	4532.5	290.8	356.6	356.9	446.5
WH Smith	397.40	39.76	37.96	10.0	10.5	5.5	5.3	nm	4%	0.0%	0.0%	1589.6	1610.8	111.4	115.5	164.7	168.6
Whitbread	2527.00																
Wickes Group	187.00	21.94	26.33	8.5	7.1	4.9	4.3	5%	11%	6.4%	7.5%	1706.5	1794.8	84.1	95.5	207.7	226.6
Wizz Air	1233.00	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: *25/06/2026*