

Goodbody Market Commentary Metrics



28 July 2026																			
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA			
	1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027		
AIB Group	10.92	0.85	0.93	12.9	11.8	1.6	1.6			4.9%	5.4%	4586.0	4739.1	2235.3	2331.2				
Air France-KLM	11.89	4.12	5.25	2.9	2.3	3.6	3.4	60%	69%	0.0%	0.0%	35376.7	35669.4	1557.1	1872.3	4760.9	5235.7		
Applied Nutrition	332.00	11.97	13.20	27.7	25.2	19.6	16.9	1%	3%	0.0%	0.0%	148.2	186.3	40.2	44.0	41.8	47.2		
B&M European Value Ret	219.00	22.22	22.93	10.2	9.6	6.5	6.0	12%	9%	4.2%	5.0%	5775.0	5999.3	359.0	371.6	458.0	470.3		
Bank of Ireland	18.40	1.49	1.81	12.4	10.2	1.3	1.3			4.3%	5.2%	4260.6	4526.2	1859.7	2061.6				
Barratt Redrow	293.30	29.61	24.94	9.9	11.8	0.5	0.5	9%	7%	5.6%	0.3%	6074.1	6319.0	588.5	474.5	604.8	492.8		
Beauty Tech Group	360.00	24.23	27.79	14.9	13.0	7.3	5.9	8%	10%	0.0%	0.0%	170.9	190.1	32.8	37.4	45.4	50.9		
Bellway	1975.00	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	3456.00	334.63	290.34	10.3	11.9	0.9	0.9	4%	7%	3.5%	1.9%	2258.6	2014.5	441.3	375.1	425.6	358.4		
Breedon Group	320.60	29.54	33.09	10.9	9.7	6.0	5.4	9%	10%	4.9%	5.2%	1792.6	1869.8	142.0	154.8	282.1	299.4		
Bytes Technology	404.00	22.47	24.51	18.0	16.5	12.5	10.9	6%	6%	6.8%	7.5%	224.8	243.9	63.7	71.2	65.5	73.2		
C & C Group	103.40	0.10	0.10	16.6	12.0	9.1	7.7	0%	6%	3.4%	4.8%	1569.8	1497.8	70.5	71.2	104.3	105.0		
Cairn Homes	2.51	0.23	0.25	11.0	9.8	7.8	7.3	4%	8%	4.6%	5.0%	1065.6	1204.2	181.7	200.5	183.8	203.1		
Coca-Cola HBC	4918.00	2.93	3.16	19.7	18.2	11.6	10.7	4%	4%	2.3%	2.4%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2		
Compass Group	31.02	1.48	1.63	21.0	19.1	11.6	10.7	4%	4%	2.4%	2.6%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9		
Cranswick	5440.00	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	102.86	585.55	660.57	17.6	15.6	10.1	9.3	10%	11%	1.6%	1.6%	39968.4	41903.2	5940.1	6435.8	8246.1	8841.4		
DCC	6340.00	437.42	511.23	11.0	12.4	6.3	7.5	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	128.8	34.0	5.2	3.8	9%	11%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8		
Diageo	1591.00	1.59	1.56	13.3	13.6	11.5	11.3	7%	6%	2.6%	2.8%	19670.7	18889.7	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	620.00	8.17	18.19	75.9	34.1	5.3	4.7	nm	nm	2.5%	2.7%	10599.5	11668.6	60.3	235.6	919.7	1255.2		
Entain	574.40	60.21	71.83	9.5	8.0	6.1	6.1	10%	12%	3.6%	3.8%	5574.3	5794.4	869.4	980.2	1162.3	1237.4		
Evolve	45.30	17.65	FALSE	2.6	FALSE	4.5	FALSE	53%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE		
FBD Holdings	17.00	1.47	1.57	11.5	10.8	1.3	1.3												
Fever-Tree Drinks	819.50	29.14	39.37	28.1	20.8	17.0	13.0	4%	6%	2.3%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7		
Flutter Entertainment	107.58	5.91	9.45	18.2	11.4	10.3	7.5	4%	8%	0.0%	0.0%	18331.4	20507.4	2079.6	2909.2	2812.8	3729.5		
Forterra	136.00	11.51	13.18	11.8	10.3	6.4	5.6	15%	13%	5.3%	6.0%	390.7	420.3	38.1	42.0	57.6	63.0		
Frontier Developments	430.00	849.11	0.00	0.5	nm	3.4	3.5	5%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3		
Fuller, Smith & Turner	760.00	47.18	52.27	13.3	14.5	7.3	8.3	7%	6%	3.4%	3.0%	397.8	413.3	40.8	48.3	74.6	77.7		
Games Workshop Group	20220.00	547.81	585.95	36.9	34.5	22.9	21.2	3%	3%	2.4%	2.6%	625.0	671.8	238.5	254.4	281.9	305.1		
Glanbia	25.59	1.50	1.63	17.0	15.7	12.5	11.3	5%	6%	1.8%	2.0%	4106.8	4250.4	409.8	442.8	535.0	568.8		
Glenveagh Properties	2.44	0.21	0.23	11.5	10.6	13.2	11.8	13%	9%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9		
Grafton Group	952.30	76.63	84.53	12.4	11.3	6.0	5.4	8%	7%	4.0%	4.1%	2685.0	2822.0	169.5	182.1	322.5	340.1		
Greencoast Renewables	0.79	0.05	FALSE	15.5	FALSE	21.0	FALSE	17%	FALSE	8.7%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE		
Greencore	246.00	20.07	24.02	12.3	10.2	7.9	5.9	9%	11%	1.2%	2.0%	3374.4	4091.1	193.2	248.5	336.3	429.9		
Greggs	1635.00	122.24	122.97	13.4	13.3	5.6	5.3	4%	6%	4.2%	4.2%	2288.8	2415.5	190.0	191.5	372.7	390.5		
Hammerson	370.20	22.44	24.20	16.5	15.3	0.9	0.9	6%	8%	4.8%	5.1%	214.4	230.6	176.6	189.6	176.5	189.5		
Hostelworld Group	104.00	0.13	0.18	9.5	6.9	6.1	4.2	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9		
Howden Joinery	770.50	52.56	56.26	14.7	13.7	8.8	8.0	6%	7%	2.9%	3.1%	2574.3	2735.8	390.3	423.3	553.2	598.3		
JAG	440.70	0.59	0.76	8.7	6.8	4.1	3.6	11%	11%	2.0%	2.2%	34714.5	36409.9	4372.5	5043.3	6773.0	7608.5		
Just Eat	94.30	5.69	7.33	16.6	12.9	7.9	6.9	5%	8%	3.1%	3.9%	390.5	420.2	33.1	41.6	67.8	75.3		
KCC	7.90	0.00	0.00	nm	nm	nm	nm	0%	0%	0.0%	0.0%	0.0	0.0	0.0	0.0	0.0	0.0		
IRIS REIT	0.13	0.15	0.15	8.7	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	731.50	39.18	48.69	18.7	15.0	8.1	7.6	12%	8%	1.6%	1.6%	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	849.00	33.13	43.31	25.6	19.6	16.2	12.0	7%	8%	2.9%	2.9%	430.3	499.9	45.9	61.9	53.8	70.8		
Kerry Group	83.10	5.09	5.66	16.3	14.7	12.3	11.2	5%	5%	1.9%	2.0%	6830.3	7117.6	943.0	1030.3	1247.3	1336.4		
Kingfisher	304.00	23.42	25.14	12.1	12.1	5.3	5.4	10%	9%	4.4%	4.1%	12945.0	13264.7	651.0	686.5	1327.0	1328.3		
Kingspan	75.60	4.14	4.52	18.3	16.7	11.8	10.7	5%	5%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6		
Lufthansa	8.93	1.09	1.27	8.2	7.1	7.8	7.2	18%	16%	3.7%	4.3%	42361.2	42819.1	1828.5	2237.6	3208.2	3539.7		
Marston's	51.90	8.78	9.99	5.9	5.2	7.1	6.7	16%	15%	0.0%	3.9%	900.3	916.6	164.6	170.4	210.0	215.8		
Mitchells & Butlers	266.50	31.43	33.14	8.5	8.0	6.0	5.6	5%	6%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3		
Molten Ventures	615.00	59.68	42.69	10.3	14.4	8.0	11.2	4%	3%	0.0%	0.0%	168.7	128.9	138.4	96.8	138.5	96.9		
Mondi	752.80	0.45	0.72	19.7	12.2	7.8	6.5	2%	3%	2.8%	4.1%	8180.1	8523.7	399.5	578.5	917.9	1092.9		
NCC Group	143.00	4.20	4.73	34.0	30.2	11.0	10.3	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3		
Origin Enterprises	4.43	0.54	0.55	8.3	8.0	5.6	5.2	nm	12%	4.1%	4.3%	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	1112.50	94.20	101.01	11.8	11.0	1.0	0.9	nm	6%	3.6%	3.8%	3905.9	4149.7	463.6	495.1	487.7	522.3		
Playtech	390.20	0.22	0.29	20.4	15.5	0.7	0.7	3%	5%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2		
Rank Group	99.10	9.81	10.33	10.1	9.6	5.0	4.7	4%	7%	3.0%	3.3%	852.6	919.9	67.6	71.2	123.4	129.6		
Ryanair	24.57	2.12	1.76	11.9	14.0	6.5	6.8	6%	5%	1.7%	1.9%	15544.3	15973.6	2459.2	2013.4	3832.6	3632.9		
Smurfit Westrock	50.09	2.17	2.83	23.0	17.7	7.7	7.7	6%	6%	3.7%	3.9%	32582.9	33911.5	2261.2	2690.5	5141.2	5548.8		
SSP Group	194.50	13.90	16.67	14.0	11.7	6.8	6.4	4%	6%	2.6%	3.0%	3825.4	3979.6	297.7	330.3	635.0	677.9		
Tate & Lyle	555.50</																		