

Goodbody Market Commentary Metrics



29 April 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	9.61	0.84	0.92	11.4	10.5	1.4	1.4			5.6%	6.1%	4566.0	4699.2	2215.3	2291.2		
Air France-KLM	8.93	3.85	5.51	2.3	1.6	3.5	3.2	79%	106%	0.0%	0.0%	34825.2	36319.9	1556.1	2033.0	4755.8	5466.2
Applied Nutrition	215.00	11.41	12.82	18.8	16.8	12.8	11.1	2%	4%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	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	16.33	1.47	1.78	11.1	9.2	1.2	1.1			4.9%	5.8%	4238.5	4481.1	1837.5	2016.4		
Barratt Redrow	252.00	29.14	35.88	8.6	7.0	0.4	0.4	nm	15%	6.7%	8.1%	5805.3	6417.2	609.3	726.2	613.7	727.7
Beauty Tech Group	311.00	21.04	24.57	14.8	12.7	7.0	5.5	8%	10%	0.0%	0.0%	160.8	180.9	28.2	32.8	40.5	46.0
Bellway	1916.00	183.78	213.85	10.4	9.0	0.6	0.6	4%	14%	3.9%	4.8%	3049.1	3233.9	325.0	364.3	328.1	367.3
Berkeley Group	3236.00	342.80	354.08	9.4	9.1	0.9	0.8	5%	13%	3.7%	2.0%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	306.00	30.07	34.93	10.2	8.8	5.6	5.1	9%	8%	5.1%	5.4%	1786.3	1862.1	142.0	158.9	281.4	302.7
Bvets Technology	301.80	22.47	24.51	13.4	12.3	8.8	7.6	8%	8%	9.1%	10.0%	224.8	243.9	63.7	71.2	65.5	73.2
C & C Group	116.20	0.11	0.11	12.8	12.4	7.7	8.0	5%	6%	4.8%	4.8%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.18	0.23	0.25	9.6	8.5	6.6	6.3	5%	9%	1065.6	1204.2	181.7	200.5	183.8	203.1		
Coca-Cola HBC	4225.00	2.92	3.14	16.7	15.5	10.1	9.3	4%	4%	2.7%	2.9%	12324.3	13014.1	1477.7	1595.1	1910.0	2038.5
Compass Group	28.52	1.46	1.58	19.6	18.0	11.2	10.5	4%	5%	2.6%	2.8%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranswick	5340.00	297.22	315.87	18.0	16.9	9.0	8.4	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0
CRH	114.44	586.63	664.39	19.5	17.2	11.1	10.3	9%	10%	1.3%	1.4%	39691.5	41441.0	5944.7	6452.7	8233.2	8829.5
DCC	5380.00	421.97	505.84	12.7	10.6	7.6	7.0	11%	11%	4.0%	4.2%	14964.1	15168.2	521.6	559.4	788.0	829.2
Devolver Digital	21.50	0.18	0.67	165.2	43.6	8.3	6.0	7%	9%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1464.60	1.59	1.61	12.4	12.2	11.0	10.5	7%	7%	2.8%	3.3%	19708.7	19203.1	5717.1	5546.1	6293.1	6090.2
Dole	14.93	135.26	144.02	11.0	10.4	4.8	4.4	11%	12%	9488.2	9634.5	284.2	293.4	407.7	419.3		
easyJet	350.80	18.11	33.65	19.4	10.4	2.4	2.6	nm	nm	4.4%	4.8%	10928.0	11793.0	138.2	365.0	1105.1	1393.5
Entain	560.20	60.21	71.83	9.3	7.8	6.6	6.0	10%	12%	3.7%	3.9%	5574.3	5794.4	869.4	980.2	1162.3	1237.4
Evoke	41.00	17.65	FALSE	2.3	FALSE	4.5	FALSE	58%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.35	1.47	1.57	11.1	10.4	1.3	1.3										
Fever-Tree Drinks	830.00	29.14	39.37	28.5	21.1	17.3	13.2	4%	6%	2.2%	2.4%	407.8	447.3	36.6	50.8	50.1	64.7
Flutter Entertainment	108.19	9.08	13.27	11.9	8.2	8.4	6.3	9%	13%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	157.60	13.41	15.15	11.7	10.4	6.4	5.6	14%	12%	5.3%	6.0%	403.4	434.0	43.6	47.6	63.8	69.3
Frontier Developments	321.50	849.11	0.00	0.4	nm	2.5	2.5	6%	9%	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	19450.00	547.81	585.95	35.5	33.2	22.0	20.4	3%	3%	2.5%	2.7%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	20.50	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	2.06	0.21	0.22	9.9	9.2	11.1	9.7	15%	11%	1074.4	1132.6	141.5	149.0	143.6	153.2		
Grafton Group	889.70	74.77	80.43	11.9	11.1	5.8	5.3	7%	7%	4.5%	4.7%	2623.2	2724.0	168.3	183.3	321.3	341.3
Greencoast Renewables	0.76	0.05	FALSE	14.8	FALSE	20.6	FALSE	18%	FALSE	9.1%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	252.60	18.17	22.96	13.9	11.0	8.7	6.2	6%	9%	1.1%	1.8%	3498.9	4334.8	225.8	317.8	331.2	447.1
Grosgos	1595.00	122.02	122.78	13.1	13.0	5.5	5.2	4%	4%	6.3%	4.3%	2279.9	2406.4	189.7	191.2	372.4	390.2
Hammerson	336.40	22.65	24.70	14.9	13.6	0.8	0.8	8%	9%	5.2%	5.6%	215.9	232.2	177.7	192.3	177.7	192.2
Hostelworld Group	108.50	0.13	0.18	9.8	7.1	6.3	4.3	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Joinery Joinery	799.00	51.39	57.32	15.5	13.9	8.7	8.1	6%	6%	2.9%	3.0%	2501.6	2598.9	372.0	405.0	535.2	571.6
JAG	371.60	0.64	0.74	6.7	5.8	3.5	3.3	12%	10%	2.4%	2.6%	35101.0	36582.9	4648.7	4925.7	6994.8	7540.9
Ibstock	104.40	6.26	7.53	16.7	13.9	7.9	7.2	5%	8%	3.0%	3.6%	399.2	429.6	36.3	42.9	71.8	77.3
ICG	6.54	0.49	0.54	13.4	12.2	7.7	6.9	4%	12%	2.5%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.04	0.17	0.15	6.1	7.0	0.8	0.7	2%	3%	5.5%	5.5%	67.6	70.0	80.2	101.6	87.6	99.1
J.D. Wetherspoon	592.00	46.07	51.49	12.9	11.5	7.3	7.0	6%	7%	2.0%	2.0%	2222.8	2319.4	132.0	139.1	247.3	255.0
Jet2	1070.00	187.33	168.11	5.7	6.4	0.5	0.9	12%	9%	1.6%	1.7%	7602.9	8161.4	431.6	361.9	771.2	777.8
Kaines Group	839.00	33.13	43.31	25.3	19.4	16.0	11.9	7%	8%	2.9%	3.0%	430.3	499.9	45.9	61.9	53.8	70.8
Kerry Group	68.95	5.01	5.51	13.8	12.5	10.6	9.6	6%	6%	2.2%	2.5%	6755.0	6991.4	929.3	1006.4	1233.6	1312.4
Kingsfisher	286.70	23.42	25.12	12.1	11.4	5.3	5.2	10%	10%	4.4%	4.3%	12945.0	13234.4	651.0	685.9	1327.0	1326.8
Kingspan	78.00	4.18	4.62	18.6	16.9	12.4	11.3	4%	4%	0.8%	0.9%	9894.3	10482.7	992.9	1071.6	1342.9	1438.6
Lufthansa	7.15	1.08	1.33	6.6	5.4	7.8	6.5	19%	25%	4.5%	5.6%	41488.5	43955.2	1801.9	2341.3	2985.7	3607.3
Marston's	50.30	9.02	10.21	5.6	4.9	7.0	6.5	17%	17%	0.0%	0.0%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	257.00	31.57	33.42	8.1	7.7	5.8	5.4	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	558.50	33.24	46.11	16.8	12.1	13.8	10.0	1%	3%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	736.80	0.45	0.72	19.0	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	118.40	4.20	4.73	28.2	25.0	9.3	8.7	4%	6%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Orion Enterprises	4.46	0.54	0.57	8.2	7.8	5.2	5.0	5%	10%	4.1%	4.3%	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	1074.00	102.91	113.64	10.4	9.5	0.9	0.9	nm	8%	3.7%	4.0%	4017.7	4280.1	502.4	550.8	526.6	578.2
Playtech	391.00	0.22	0.29	20.2	15.3	0.7	0.7	3%	5%	0.0%	0.0%	807.8	867.6	100.2	128.9	204.5	236.2
Rank Group	99.70	9.81	10.33	10.2	9.7	5.0	4.7	4%	7%	3.0%	3.3%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	22.06	2.06	2.16	10.7	10.2	5.9	5.5	10%	8%	1.9%	2.1%	15481.8	16340.1	2416.6	2463.7	3754.1	3849.4
Smurfit Westrock	2892.00	2.39	3.21	16.3	12.2	6.4	5.7	8%	9%	4.7%	5.0%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	167.00	13.90	16.80	12.0	9.9	6.3	6.1	6%	7%	3.8%	3.5%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	355.80	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	79.00	7.69	9.29	10.3	8.5	0.7	0.7	8%	9%	12.7%	13.3%	3944.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	261.00	27.01	29.27	9.7	8.9	3.6	3.1	7%	8%	0.0%	0.0%	176.6	181.2	37.0	41.3	70.2	71.3
Travis Perkins	524.00	60.01	FALSE	8.7	FALSE	4.9	FALSE	9%	FALSE	5.3%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	256.80	0.04	0.06	86.6	61.9	29.8	21.1	3%	4%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Uniphar	4.11	0.26	0.28	15.8	14.7	9.2	6.5	nm	10%	0.5%	0.5%	3210.0	3357.8	107.1	115.0	147.7	165.8
Vistry Group	326.40	22.97	31.92	14.2	10.2	2.3	2.1	34%	10%	0.0%	0.0%	4451.2	4631.0	371.1	406.4	437.8	496.1
WH Smith	544.50	53.43	60.06	10.2	9.1	6.0	5.5	0%	7%	4.0%	4.5%	1607.2	1683.6	136.1	148.7	189.9	204.2
Whitbread	2410.00																
Wickes Group	205.50	21.94	26.33														