

Goodbody Market Commentary Metrics



30 January 2026																		
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA		
Company	1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	
AIB Group	9.16	0.82	0.90	11.2	10.1	1.3	1.2			4.7%	5.8%	4553.4	4702.4	2188.1	2269.9			
Air France-KLM	10.59	5.23	5.66	2.0	1.9	3.3	3.0	55%	84%	0.0%	0.0%	34235.8	35682.0	2000.2	2117.3	5017.9	5256.6	
Applied Nutrition	233.50	10.87	12.23	21.5	19.1	14.7	12.7	2%	2%	0.0%	0.0%	134.8	150.5	36.4	40.4	37.9	42.0	
B&M European Value Ret	177.90	21.43	22.68	8.3	7.8	5.9	5.7	14%	13%	5.6%	5.7%	5771.2	5996.4	357.3	368.3	454.0	466.9	
Bank of Ireland	16.83	1.56	1.81	10.8	9.3	1.2	1.1			4.1%	4.5%	4181.7	4414.4	1794.1	2007.6			
Barratt Redrow	393.20	29.14	35.88	13.5	11.0	0.7	0.6	nm	10%	4.3%	5.2%	5805.3	6417.2	609.3	726.2	613.7	727.7	
Bellway	2740.00	188.09	228.21	14.6	12.0	0.9	0.8	12%	7%	2.7%	3.4%	3003.0	3216.2	332.4	388.1	335.4	388.7	
Berkeley Group	4110.00	342.80	354.08	12.0	11.6	1.1	1.0	4%	10%	2.9%	1.6%	2270.4	2331.6	452.2	459.2	441.0	447.0	
Breedon Group	337.00	29.89	35.36	11.3	9.5	5.9	5.2	8%	9%	4.7%	5.0%	1763.2	1848.1	159.6	178.8	282.8	306.8	
Bytes Technology	333.60	23.50	26.39	14.2	12.6	9.6	8.0	8%	8%	8.6%	9.8%	228.1	250.9	67.0	77.2	68.7	79.2	
C & C Group	109.40	0.11	0.11	12.0	11.6	7.5	7.7	5%	6%	5.1%	5.1%	1586.8	1525.6	71.8	71.8	107.4	107.4	
Cairn Homes	2.12	0.23	0.24	9.4	8.8	6.5	6.2	13%	8%	4.7%	5.2%	1045.0	1088.4	177.7	185.0	182.6	190.7	
Coca-Cola HBC	3960.00	2.89	3.13	15.8	14.6	9.7	8.9	4%	4%	2.8%	3.0%	12315.3	13029.4	1465.0	1580.5	1894.4	2021.9	
Compass Group	2172.00	1.44	1.56	20.8	19.2	11.7	11.0	4%	4%	2.4%	2.6%	50221.3	53448.4	3654.2	3916.5	5022.0	5300.0	
Cranswick	5250.00	297.22	315.87	17.7	16.6	8.8	8.3	3%	3%	2.0%	2.1%	2994.5	3175.4	227.9	240.1	325.1	344.0	
CRH	123.68	585.33	655.23	21.1	18.9	12.2	11.3	8%	8%	1.2%	1.3%	39902.0	41603.7	6011.0	6485.0	8197.6	8755.5	
DCC	4670.00	421.97	505.84	11.1	9.2	6.7	6.2	12%	13%	4.6%	4.9%	14964.1	15168.2	521.6	559.4	788.0	829.2	
Devolver Digital	25.30	0.18	0.67	198.3	52.4	11.1	8.0	6%	7%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8	
Diageo	1638.00	1.63	1.73	13.9	13.0	11.9	11.3	6%	7%	4.6%	4.8%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4	
Dole	15.86	148.86	158.22	10.7	10.0	4.9	4.5	9%	10%	2.3%	2.5%	9085.1	9270.0	298.4	309.0	408.0	418.5	
easyJet	473.20	72.79	80.15	6.5	5.9	2.0	2.1	6%	4%	3.3%	3.6%	11136.1	11799.0	727.3	834.1	1617.4	1847.2	
Entain	619.00	64.59	77.21	9.6	8.0	7.1	6.8	9%	11%	3.3%	3.5%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7	
Evoke	24.55	17.65	FALSE	1.4	FALSE	4.3	FALSE	97%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE	
FRD Holdings	16.10																	
Fever-Tree Drinks	860.00	28.99	37.75	29.7	22.8	18.0	14.2	4%	5%	2.2%	2.3%	411.5	451.3	35.2	47.5	50.2	63.6	
Flutter Entertainment	167.93	12.07	15.76	13.9	10.7	9.2	7.5	7%	10%	0.0%	0.0%	19780.1	21813.4	3522.1	4277.1	4234.2	5062.4	
Forterra	178.60	14.50	18.85	12.3	9.5	6.0	4.8	12%	14%	3.8%	5.0%	413.7	448.9	49.9	62.1	74.3	87.3	
Frontier Developments	473.00	849.11	0.00	0.6	nm	3.7	3.9	4%	6%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3	
Fuller, Smith & Turner	690.00	43.47	48.57	15.9	14.2	8.3	7.9	4%	5%	3.4%	3.7%	396.2	413.5	43.2	47.6	73.3	76.9	
Games Workshop Group	17240.00	547.81	585.95	31.5	29.4	19.4	18.1	3%	3%	2.8%	3.0%	625.0	671.8	238.5	254.4	283.9	305.1	
Glanbia	19.48	1.45	1.58	13.4	12.3	9.6	8.6	7%	7%	2.5%	2.8%	3890.9	4044.9	382.4	417.4	530.1	566.4	
Glenveagh Properties	1.97	0.21	0.22	9.3	9.0	10.7	9.8	14%	8%	0.0%	0.0%	1051.6	1133.3	142.7	146.1	146.1	150.6	
Grafton Group	930.90	74.77	80.43	12.5	11.6	6.1	5.5	6%	7%	4.3%	4.5%	2623.2	2724.0	168.3	183.3	321.3	341.3	
Greencoat Renewables	0.68	0.14	FALSE	4.7	FALSE	14.6	FALSE	21%	FALSE	11.0%	FALSE	215.4	FALSE	187.9	FALSE	187.9	FALSE	
Greencore	285.00	16.21	23.18	17.6	12.3	9.6	6.9	5%	8%	1.7%	2.4%	3504.5	4372.9	224.8	318.0	330.1	447.2	
Greggs	1625.00	124.39	132.84	13.1	12.2	5.5	5.0	3%	7%	3.8%	4.1%	2305.8	2459.0	189.7	201.4	372.0	401.3	
Hammerston	358.60	22.46	26.19	16.0	13.7	0.9	0.9	11%	17%	7.1%	7.0%	215.0	242.6	178.0	203.8	177.0	201.8	
Hopeworld Group	118.00	0.15	FALSE	9.4	FALSE	5.7	FALSE	12%	FALSE	0.0%	FALSE	107.8	FALSE	12.1	FALSE	24.0	FALSE	
Howden Joinery	837.50	50.52	53.31	16.6	15.7	9.3	9.0	5%	5%	3.3%	3.5%	2512.5	2609.6	365.0	376.9	528.4	544.6	
IAG	409.80	0.75	0.83	6.3	5.7	2.7	2.4	17%	20%	2.2%	2.3%	34276.4	35566.3	5195.8	5288.9	8071.3	8322.2	
Ibstock	128.00	7.48	9.52	17.1	13.4	8.8	7.7	7%	9%	2.9%	3.7%	408.3	436.2	41.1	51.7	77.4	86.6	
ICG	6.34	0.49	0.54	13.0	11.8	7.5	6.7	4%	13%	2.7%	2.8%	675.3	693.4	83.5	88.1	150.5	155.1	
IRIS REIT	1.02	0.14	0.15	7.5	6.6	0.7	0.7	3%	3%	5.1%	5.5%	67.6	69.9	93.9	102.4	90.4	98.9	
J D Wetherspoon	668.50	48.97	53.22	13.7	12.6	7.5	7.3	6%	6%	1.8%	1.8%	2243.1	2356.2	141.1	146.1	256.5	262.3	
Jet2	1219.00	187.52	199.17	6.5	6.1	1.3	1.0	9%	16%	1.4%	1.5%	7595.5	8223.8	432.0	440.2	770.2	810.0	
Kainos Group	901.50	33.66	38.15	26.8	23.6	16.4	14.2	5%	6%	2.7%	2.8%	395.6	413.9	51.9	58.9	59.8	67.8	
Kerry Group	73.45	5.35	5.89	13.7	12.5	10.3	9.3	5%	6%	2.1%	2.3%	7072.9	7358.0	1007.1	1101.6	1309.5	1406.0	
Kingsfisher	331.50	22.02	23.73	15.1	14.0	6.1	5.6	6%	9%	3.7%	3.7%	12956.6	13317.9	658.7	673.6	1328.9	1359.4	
Kingspan	73.75	4.25	4.81	17.4	15.3	11.9	10.7	5%	5%	0.8%	0.9%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5	
Lufthansa	8.64	1.24	1.54	7.0	5.6	6.8	5.9	17%	20%	4.3%	5.3%	41656.1	43551.9	2156.2	2615.4	3554.4	4067.9	
Manston's	60.50	9.02	10.21	6.7	5.9	7.3	6.8	14%	14%	0.0%	3.3%	908.6	930.0	166.0	174.5	211.6	220.0	
Mitchells & Butlers	264.00	31.57	33.42	8.4	7.9	5.9	5.5	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1	
Molten Ventures	511.00	33.24	46.11	15.4	11.1	12.7	9.2	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8	
Mondi	877.60	0.89	1.10	11.3	9.2	6.9	6.2	3%	6%	6.0%	6.4%	7951.4	8356.1	651.6	765.8	1120.7	1233.8	
NCC Group	140.60	4.20	4.73	33.4	29.7	10.9	10.2	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3	
Origin Enterprises	4.18	0.54	0.57	7.7	7.3	4.9	4.7	6%	11%	4.3%	4.6%	2129.2	2173.2	86.3	89.1	120.8	125.4	
Permanent TSB	3.06	0.21	0.29	14.8	10.7	0.7	0.7			2.3%	3.9%	698.1	766.6	171.7	221.2			
Persimmon	1434.50	103.14	116.00	13.9	12.4	1.2	1.1	4%	7%	2.8%	3.0%	3861.4	4154.5	494.9	548.6	520.6	577.3	
Playtech	298.00	0.20	0.28	17.2	12.3	0.6	0.5	3%	6%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6	
Rank Group	89.20	9.81	10.33	9.1	8.6	4.6	4.3	5%	8%	3.3%	3.7%	852.6	919.9	67.6	71.2	123.4	129.6	
Ryanair	28.23	2.10	2.32	13.4	12.2	7.5	6.7	11%	7%	1.5%	1.6%	15448.0	16196.0	2451.5	2639.1	3789.1	4024.8	
Smurfit Westrock	41.79	2.84	3.88	14.7	10.8	6.5	5.7	6%	8%	3.8%	4.6%	32397.6	34040.7	2587.4	3228.4	5312.1	5959.1	</