

Goodbody Market Commentary Metrics



27 February 2026																	
Company	Price 1c	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
		2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	8.74	0.81	0.90	10.7	9.7	1.2	1.2			5.0%	6.1%	4569.1	4708.1	2193.7	2275.6		
Air France-KLM	12.87	5.98	7.52	2.2	1.7	3.2	2.9	69%	90%	0.0%	0.0%	34552.6	36037.2	2206.4	2647.0	5404.1	6076.3
Applied Nutrition	253.00	11.41	12.82	22.2	19.7	15.2	13.2	2%	3%	0.0%	0.0%	141.1	157.0	38.2	42.4	39.7	44.0
B&M European Value Retn	190.40	21.43	22.68	8.9	8.4	6.2	6.0	13%	13%	5.3%	5.4%	5771.2	5996.4	357.3	368.3	454.0	466.9
Bank of Ireland	16.47	1.58	1.83	10.4	9.0	1.2	1.1			4.2%	4.6%	4200.8	4421.8	1813.1	2015.0		
Barratt Redrow	369.30	29.14	35.88	12.7	10.3	0.6	0.6	nm	10%	4.6%	5.6%	5805.3	6417.2	609.3	726.2	613.7	727.7
Bellway	2794.00	188.09	228.21	14.9	12.2	0.9	0.8	11%	7%	2.7%	3.3%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	4326.00	342.80	354.08	12.6	12.2	1.1	1.1	4%	10%	2.8%	1.5%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	356.00	29.89	35.36	11.9	10.1	6.1	5.5	8%	8%	4.5%	4.7%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bvies Technology	288.00	23.50	26.39	12.3	10.9	8.0	6.7	9%	10%	10.0%	11.3%	228.1	250.9	67.0	77.2	68.7	79.2
C & C Group	115.00	0.11	0.11	12.6	12.2	7.7	7.9	5%	6%	4.8%	4.8%	1586.8	1525.6	71.8	71.8	107.4	107.4
Cairn Homes	2.30	0.23	0.24	10.2	9.5	7.1	6.8	12%	8%	4.4%	4.8%	1045.0	1088.4	177.7	185.0	182.6	190.7
Coca-Cola HBC	4810.00	2.92	3.14	18.9	17.6	11.4	10.5	4%	4%	2.3%	2.5%	12421.2	13147.5	1475.8	1593.6	1911.5	2041.6
Compass Group	2225.00	1.46	1.58	20.7	19.0	11.7	11.0	4%	4%	2.4%	2.6%	50575.5	53950.6	3692.9	3966.0	5070.3	5362.5
Cranwick	5390.00	297.22	315.87	18.1	17.1	9.1	8.5	3%	3%	2.0%	2.1%	2294.5	3175.4	227.9	240.1	325.1	344.0
CBH	121.14	583.63	654.68	20.8	18.5	11.7	10.8	8%	9%	1.3%	1.4%	39691.5	41342.5	5944.7	6418.7	8233.2	8789.6
DCC	5150.00	421.97	505.84	12.2	10.2	7.3	6.8	11%	11%	4.2%	4.4%	14964.1	15168.2	521.6	549.4	788.0	829.2
Devolver Digital	25.00	0.18	0.67	19.7	50.9	10.7	7.7	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1636.00	1.63	1.73	13.6	12.8	11.8	11.2	6%	7%	4.7%	4.9%	20054.3	20791.9	5809.0	6110.5	6398.9	6697.4
Dole	15.71	148.96	158.44	10.5	9.9	4.9	4.6	9%	10%	2.4%	2.5%	9311.8	9501.3	298.6	309.3	408.1	418.9
easyJet	462.30	73.47	81.16	6.3	5.7	2.0	2.0	8%	7%	3.4%	3.7%	11209.3	11869.9	738.1	848.5	1613.7	1857.8
Entain	570.40	64.59	77.21	8.8	7.4	6.8	6.6	10%	12%	3.6%	3.8%	5617.7	5877.7	839.1	1303.8	1117.2	1146.7
Evoke	28.90	17.65	FALSE	1.6	FALSE	4.3	FALSE	82%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	16.30																
Fever-Tree Drinks	951.00	29.23	39.36	32.5	24.2	20.1	15.5	3%	5%	2.0%	2.1%	405.4	444.5	35.8	50.5	50.1	65.1
Flutter Entertainment	120.43	9.08	13.27	13.3	9.1	9.0	6.7	8%	12%	0.0%	0.0%	19384.9	21747.0	2743.4	3651.6	3441.3	4434.5
Forterra	186.60	14.50	18.85	12.9	9.9	6.3	5.0	11%	13%	4.1%	4.8%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	390.00	849.11	0.00	0.5	nm	3.0	3.1	5%	7%	0.0%	0.0%	96.6	96.6	9.1	6.9	43.0	40.3
Fuller, Smith & Turner	744.00	43.47	48.57	17.1	15.3	8.7	8.3	4%	5%	3.2%	3.4%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	17430.00	547.81	585.95	31.8	29.7	19.7	18.3	3%	3%	2.8%	3.0%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	20.27	1.45	1.58	14.0	12.8	9.9	8.9	7%	7%	2.4%	2.7%	389.9	404.9	382.4	417.4	530.1	566.4
Glenveagh Properties	2.16	0.21	0.22	10.2	9.8	11.7	10.7	13%	8%	0.0%	0.0%	1015.6	1133.3	142.7	146.1	146.7	150.6
Grafton Group	970.70	74.77	80.43	13.0	12.1	6.3	5.8	6%	7%	26.3%	4.1%	2623.2	1873.0	168.3	183.3	321.3	341.3
Greencoast Renewables	0.66	0.05	FALSE	12.9	FALSE	19.5	FALSE	20%	FALSE	10.4%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	267.00	16.21	23.18	16.5	11.5	9.2	6.6	5%	9%	1.8%	2.6%	3504.5	4372.9	224.8	318.0	330.1	447.2
Greggs	1596.00	124.39	132.84	12.8	12.0	5.5	5.0	3%	7%	3.9%	4.2%	2305.8	2459.0	189.7	201.4	372.0	401.3
Hammerston	370.80	22.46	26.19	16.5	14.2	1.0	0.9	10%	16%	6.8%	6.8%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	108.00	0.13	0.18	9.7	7.0	6.2	4.3	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	856.00	50.27	53.10	17.0	16.1	9.6	9.2	5%	5%	3.2%	3.4%	2495.9	2592.7	363.2	375.5	526.6	543.1
IAG	446.10	0.78	0.87	6.5	5.9	2.8	2.5	17%	19%	2.0%	2.1%	34358.9	35651.9	5414.3	5569.3	8289.9	8602.6
Ibstock	129.80	7.48	9.52	17.4	13.6	8.9	7.7	7%	8%	2.9%	3.1%	408.3	436.2	41.1	51.7	77.4	86.6
ICG	6.72	0.49	0.54	13.8	12.5	7.9	7.1	4%	12%	2.5%	2.7%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	1.09	0.14	0.15	8.0	7.1	0.8	0.7	2%	3%	4.8%	5.2%	67.6	102.4	93.9	102.4	90.4	98.9
J.D. Wetherspoon	727.50	48.97	53.22	14.9	13.7	7.8	7.5	5%	6%	1.6%	1.6%	2243.1	2356.2	141.1	146.1	256.5	262.2
Jet2	1250.00	190.10	189.04	6.6	6.6	1.0	1.0	9%	13%	1.4%	1.4%	7605.5	8182.1	439.5	414.8	777.4	783.6
Kainos Group	704.50	32.66	38.15	20.9	18.5	12.3	10.7	6%	8%	3.5%	3.5%	395.6	413.9	51.9	58.9	59.8	67.8
Kerry Group	72.60	5.01	5.52	14.5	13.2	11.1	10.1	5%	6%	2.1%	2.3%	6666.6	6909.1	929.2	1006.9	1233.4	1312.8
Kingfisher	365.20	22.02	23.73	16.6	15.4	6.5	6.0	5%	8%	3.4%	3.4%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	82.05	4.25	4.81	19.3	17.1	13.1	11.8	4%	5%	0.8%	0.8%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5
Lufthansa	9.18	1.24	1.54	7.4	6.0	7.2	6.4	16%	19%	4.0%	5.0%	41784.6	43685.5	2152.9	2614.6	3493.5	3976.2
Manston's	59.70	9.02	10.21	6.6	5.8	7.2	6.7	15%	15%	0.0%	3.4%	908.6	930.0	166.0	174.5	211.6	220.0
Mitchells & Butlers	295.00	31.57	33.42	9.3	8.8	6.2	5.9	5%	6%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	468.00	33.24	46.11	14.1	10.1	11.7	8.5	1%	4%	0.0%	0.0%	111.2	140.9	72.7	105.7	77.8	105.8
Mondi	882.00	0.53	0.94	19.1	10.8	8.1	6.3	3%	3%	2.9%	4.6%	8105.0	8518.2	447.6	703.3	961.2	1217.3
NCC Group	131.80	4.20	4.73	31.4	27.9	10.2	9.6	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Origin Enterprises	4.20	0.54	0.57	7.7	7.4	5.0	4.8	6%	11%	4.3%	4.3%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	3.20	0.21	0.29	15.5	11.2	0.8	0.7			2.2%	3.7%	698.1	766.6	171.7	221.2		
Persimmon	1522.00	103.14	116.00	14.8	13.1	1.3	1.2	3%	7%	2.6%	2.8%	3861.4	4154.5	494.9	548.6	520.6	577.3
Playtech	355.50	0.20	0.28	20.4	14.6	0.7	0.6	3%	5%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	94.50	9.81	10.33	9.6	9.2	4.8	4.5	4%	8%	3.1%	3.5%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	27.48	2.09	2.33	13.1	11.8	7.5	6.7	8%	7%	1.5%	1.7%	15448.0	16196.0	2449.7	2663.1	3787.2	4048.8
Smurfit Westrock	45.10	2.39	3.21	18.8	14.1	7.0	6.2	7%	8%	4.1%	4.3%	32624.8	34149.8	2454.4	2945.7	5274.7	5805.7
SSP Group	202.20	13.90	16.80	14.5	12.0	6.7	6.5	5%	6%	2.5%	2.9%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle	399.20	41.43	45.31	9.6	8.8	7.5	7.0	6%	11%	5.1%	5.3%	2037.7	2077.5	290.8	304.2	421.3	434.3
Taylor Wimpey	113.35	7.69	9.29	14.7	12.2	1.0	1.0	5%	6%	8.8%	9.3%	3941.4	4240.8	413.6	494.0	420.5	502.0
Everplay Group	297.00	28.01	29.78	10.6	10.0	4.1	3.6	7%	7%	0.0%	0.0%	181.2	186.9	38.9	42.3	72.2	72.3
Travis Perkins	690.00	60.01	FALSE	11.5	FALSE	5.8	FALSE	7%	FALSE	4.1%	FALSE	4874.0	FALSE	196.2	FALSE	391.5	FALSE
Trustpilot Group	138.30	0.04	0.06	46.8	33.4	15.4	10.6	5%	7%	0.0%	0.0%	301.2	360.1	33.2	49.3	43.4	59.9
Unigipar	4.08	0.24	0.27	16.7	15.4	9.1	6.3	7%	11%	0.5%	0.5%	3040.7	3113.4	107.4	111.6	145.5	161.6
Vistry Group	714.40	46.20	55.16	15.5	13.0	5.0	4.1	16%	16%	0.0%	0.0%	4249.6	4647.3	371.9	426.5	484.0	558.5
WH Smith	670.00	56.72	61.98	11.8	10.8	9.1	8.5	1%	6%	3.4%	3.8%	1615.2	1697.8	142.5	152.2	196.6	208.3
Whitbread	2609.00																
Wickes Group	252.50	21.84	26.24	11.6	9.6	5.4	4.7	6%	9%	4.8%	4.8%	1710.3	1779.7	81.7	93.0	206.0	222.8
Wizz Air	1294.00	-0.12	0														