

Goodbody Market Commentary Metrics



December 2025																	
	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	9.22	0.82	0.90	11.3	10.2	1.3	1.2			4.7%	5.8%	4563.4	4702.4	2188.1	2269.9		
Air France-KLM	11.34	5.23	5.66	2.2	2.0	3.3	3.0	52%	79%	0.0%	0.0%	34235.8	35682.0	2000.2	2117.3	5017.9	5256.6
Applied Nutrition	250.50	10.87	12.23	23.0	20.5	15.8	13.8	2%	3%	0.0%	0.0%	134.8	150.5	36.4	40.4	37.9	42.0
B&M European Value Ret	162.25	24.04	26.87	6.7	6.0	5.1	4.9	17%	15%	6.5%	7.5%	5812.2	6077.1	392.9	419.7	490.2	519.6
Bank of Ireland	16.33	1.56	1.81	10.4	9.0	1.2	1.1			4.2%	4.6%	4181.7	4414.4	1794.1	2007.6		
Bakkavor Group	238.00																
Barratt Redrow	372.00	29.14	36.44	12.8	10.2	0.7	0.7	6%	8%	4.6%	5.5%	5859.2	6478.5	600.5	739.6	609.1	745.9
Bellway	2676.00	188.09	228.21	14.2	11.7	0.9	0.8	12%	8%	2.8%	3.5%	3003.0	3216.2	332.4	388.1	335.4	388.7
Berkeley Group	3882.00	342.80	354.08	11.3	11.0	1.0	1.0	4%	11%	3.1%	1.7%	2270.4	2331.6	452.2	459.2	441.0	447.0
Breedon Group	330.00	29.86	35.16	11.1	9.4	5.7	5.1	9%	9%	4.8%	5.1%	1763.2	1848.1	159.6	178.8	282.8	306.8
Bytes Technology	363.00	23.50	26.39	15.5	13.8	10.7	8.9	7%	8%	7.9%	9.0%	228.1	250.9	67.0	77.2	68.7	79.2
C & C Group	133.60	0.12	0.14	12.6	11.2	7.8	7.6	5%	7%	4.2%	4.5%	1602.7	1597.1	79.7	84.9	115.3	120.5
Cairn Homes	2.04	0.23	0.24	9.0	8.5	6.5	6.6	17%	14%	4.9%	5.4%	1045.0	1088.4	177.7	185.0	182.6	190.7
Coca-Cola HBC	3836.00	2.86	3.10	15.4	14.2	9.4	8.7	4%	5%	2.9%	3.1%	12191.1	12895.9	1447.1	1561.2	1872.2	1998.0
Compass Group	2384.00	1.44	1.56	22.3	20.6	12.5	11.8	4%	4%	2.2%	2.4%	50221.3	53448.4	3654.2	3916.5	5022.0	5300.0
Cranswick	5010.00	291.57	310.55	17.2	16.1	8.6	8.1	3%	3%	2.1%	2.2%	2942.6	3119.6	219.7	231.7	316.0	333.7
CRH	126.60	585.33	655.23	21.6	19.3	12.4	11.6	7%	8%	1.2%	1.3%	39902.0	41603.7	6011.0	6485.0	8197.6	8755.5
DCC	4736.00	433.35	498.02	10.9	9.5	6.7	6.2	12%	13%	4.6%	4.8%	14959.5	15055.9	521.4	549.3	787.9	819.1
Devolver Digital	24.50	0.18	0.67	188.1	49.7	10.3	7.4	6%	8%	0.0%	0.0%	109.6	118.6	1.1	4.2	5.7	8.8
Diageo	1588.00	1.67	1.78	12.8	12.1	11.3	10.7	7%	7%	4.8%	5.1%	20139.3	20870.6	5929.4	6253.1	6522.6	6843.1
Dole	15.05	148.86	158.22	10.1	9.5	4.7	4.4	9%	10%	2.5%	2.6%	9085.1	9270.0	298.4	309.0	408.0	418.5
easyJet	506.80	72.79	80.15	7.0	6.3	2.2	2.3	6%	4%	3.1%	3.4%	11136.1	11799.0	727.3	834.1	1617.4	1847.2
Entain	745.20	75.64	92.76	9.9	8.0	7.2	6.6	9%	11%	2.8%	2.9%	5602.0	5859.9	934.9	1441.9	1213.0	1291.8
Evolve	21.45	17.65	FALSE	1.2	FALSE	4.2	FALSE	111%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FRD Holdings	15.70																
Fever-Tree Drinks	810.00	28.99	37.75	27.9	21.5	16.9	13.3	4%	5%	2.3%	2.4%	411.5	451.3	35.2	47.5	50.2	63.6
Flutter Entertainment	217.15	12.07	15.76	18.0	13.8	11.3	9.2	5%	8%	0.0%	0.0%	19780.1	21813.4	3522.1	4277.1	4234.2	5062.4
Forterra	183.40	14.50	18.85	12.6	9.7	6.2	4.9	12%	14%	3.7%	4.9%	413.7	448.9	49.9	62.1	74.3	87.3
Frontier Developments	432.50	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	720.00	43.47	48.57	16.6	14.8	8.5	8.1	4%	5%	3.3%	3.5%	396.2	413.5	43.2	47.6	73.3	76.9
Games Workshop Group	19160.00	547.81	585.95	35.0	32.7	21.7	20.1	3%	3%	2.6%	2.7%	625.0	671.8	238.5	254.4	283.9	305.1
Glanbia	17.04	1.45	1.58	11.8	10.8	8.4	7.5	8%	9%	2.9%	3.2%	3890.9	4044.9	382.4	417.4	530.1	566.4
Glanveagh Properties	1.91	0.21	0.21	9.1	9.1	9.8	9.1	15%	11%	0.0%	0.0%	1072.3	1061.8	146.5	146.2	149.9	149.6
Grafton Group	933.00	74.93	81.31	12.5	11.5	6.1	5.5	6%	7%	4.3%	4.5%	2634.4	2734.3	168.7	185.4	321.7	343.4
Greencoast Renewables	0.69	0.14	FALSE	4.8	FALSE	14.7	FALSE	21%	FALSE	10.8%	FALSE	215.4	FALSE	187.9	FALSE	187.9	FALSE
Greencore	253.00																
Greggs	1676.00	132.76	143.97	12.6	11.6	5.7	5.1	4%	8%	4.0%	4.3%	2354.7	2568.2	199.2	215.2	384.5	419.0
Hammerson	322.00	22.46	26.19	14.3	12.3	0.9	0.8	12%	19%	7.9%	7.8%	215.0	242.6	178.0	203.8	177.0	201.8
Hostelworld Group	119.00	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	828.50	50.52	53.31	16.4	15.5	9.2	8.9	5%	5%	3.3%	3.5%	2512.5	2609.6	365.0	376.9	528.4	544.6
IAG	418.70	0.75	0.83	6.4	5.8	2.7	2.5	17%	19%	2.1%	2.3%	34276.4	35566.3	5195.8	5288.9	8071.3	8322.2
Ibstock	139.00	9.48	11.75	14.7	11.8	8.2	7.1	8%	9%	3.4%	4.2%	407.3	437.0	51.8	63.7	88.1	98.6
ICG	6.06	0.47	0.52	12.9	11.7	7.3	6.5	4%	13%	2.8%	3.0%	675.3	693.4	83.5	88.1	150.5	155.1
IRIS REIT	0.94	0.13	0.15	7.0	6.2	0.7	0.6	3%	3%	5.4%	5.7%	67.6	69.9	92.0	100.6	89.4	98.0
J.D. Wetherspoon	727.50	53.97	61.14	13.5	11.9	7.8	7.4	5%	6%	1.6%	1.7%	2223.5	2329.3	151.2	160.8	264.7	275.1
Jet2	1403.00	194.54	225.28	7.2	6.2	1.4	0.9	13%	17%	1.4%	1.5%	7565.2	8341.1	450.6	511.9	782.8	887.0
Kainos Group	1013.00	33.66	38.15	30.1	26.6	18.6	16.2	4%	5%	2.4%	2.5%	395.6	413.9	51.9	58.9	59.8	67.8
Kierru Group	76.40	5.41	5.96	14.1	12.8	10.8	9.7	5%	5%	2.0%	2.2%	7110.7	7397.2	1017.4	1112.5	1321.9	1419.1
Kingsfisher	310.90	22.02	23.73	14.1	13.1	5.8	5.3	6%	10%	4.0%	4.0%	12956.6	13317.9	658.7	673.6	1328.9	1359.4
Kingspan	74.30	4.25	4.81	17.5	15.5	12.0	10.8	5%	5%	0.8%	0.9%	9655.7	10379.1	971.5	1069.5	1321.5	1436.5
Lufthansa	8.42	1.24	1.54	6.8	5.5	6.7	5.8	18%	21%	4.4%	5.5%	41656.1	43551.9	2156.2	2615.4	3554.4	4067.2
Manston's	59.00	9.02	10.21	6.5	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	262.00	31.57	33.42	8.3	7.8	5.8	5.5	6%	7%	0.0%	0.0%	2816.5	2920.1	331.9	341.8	471.1	485.1
Molten Ventures	492.80	33.24	46.11	14.8	10.7	12.3	8.9	1%	4%	0.0%	0.0%	111.2	140.9	77.7	105.7	77.8	105.8
Mondi	890.00	0.90	1.18	11.3	8.7	6.8	5.9	3%	7%	6.0%	6.4%	8072.4	8651.9	658.6	810.1	1134.8	1294.6
NCC Group	141.40	4.20	4.73	33.6	29.9	10.9	10.2	3%	5%	0.1%	0.1%	322.7	329.4	23.2	25.3	44.0	46.3
Orion Enterprises	4.20	0.54	0.57	7.7	7.4	5.0	4.8	6%	11%	4.3%	4.5%	2129.2	2173.2	86.3	89.1	120.8	125.4
Permanent TSB	2.88	0.21	0.29	13.9	10.1	0.7	0.7			2.4%	4.2%	698.1	766.6	171.7	221.2		
Persimmon	1322.50	104.31	122.04	12.7	10.8	1.1	1.1	4%	8%	3.0%	3.2%	3758.4	4062.8	489.6	568.8	514.9	597.1
Playtech	283.50	0.20	0.28	16.2	11.6	0.5	0.5	3%	6%	0.0%	0.0%	831.6	890.8	89.4	121.3	193.7	228.6
Rank Group	100.60	10.62	13.56	9.5	7.4	4.8	4.0	5%	11%	3.2%	4.3%	852.6	919.9	72.4	90.4	128.2	148.8
Ryanair	29.45	2.07	2.29	14.2	12.9	8.0	7.1	9%	8%	1.4%	1.6%	15392.3	16131.4	2415.2	2571.2	3732.4	3938.7
Smurfit Westrock	37.96	2.88	3.89	13.2	9.8	6.2	5.3	6%	9%	4.2%	5.1%	31816.5	33792.7	2602.6	3236.2	5281.6	6049.3
SSP Group	205.40	13.90	16.80	14.8	12.2	6.8	6.5	5%	5%	2.4%	2.9%	3815.7	4005.7	304.0	331.4	650.8	681.4
Tate & Lyle																	