

Goodbody Market Commentary Metrics



29 September 2025																	
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
	1c	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
AIB Group	7.70	0.80	0.77	9.6	10.1	1.1	1.1			5.1%	5.3%	4428.2	4411.5	2087.0	2036.3		
Air France-KLM	11.67	6.42	5.79	1.8	2.0	3.4	3.0	54%	84%	0.0%	0.0%	33220.1	34529.6	1983.6	2172.4	4781.2	5066.2
Applied Nutrition	163.00	9.12	10.12	17.9	16.1	12.6	10.9	4%	4%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3
B&M European Value Ret	263.30	34.42	33.20	11.9	7.9	8.2	6.0	7%	12%	3.7%	5.7%	5571.0	5855.6	527.0	518.3	619.0	614.6
Bank of Ireland	13.90	1.20	1.42	11.6	9.8	1.0	1.0			4.6%	5.0%	4099.0	4148.1	1687.2	1777.2		
Bakkavor Group	209.50																
Barratt Redrow	379.20	35.48	29.14	10.7	13.0	0.7	0.7	nm	6%	4.2%	4.5%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2386.00	172.35	197.69	13.8	12.1	0.8	0.8	4%	9%	2.9%	3.4%	2780.5	2999.9	299.1	337.6	305.2	337.7
Berkeley Group	3682.00	370.16	317.54	11.9	11.6	1.3	1.0	4%	6%	1.6%	3.3%	2486.5	2374.4	514.7	444.0	503.8	435.0
Breedon Group	347.00	30.91	33.50	11.2	10.4	6.2	5.6	5%	9%	4.4%	4.6%	1748.8	1837.9	162.1	176.9	284.3	304.4
Bytes Technology	393.80	25.75	27.00	15.3	14.6	11.1	9.5	7%	8%	7.9%	8.9%	222.1	248.3	72.7	81.7	74.2	83.4
C & C Group	138.00	0.12	0.12	15.9	13.3	8.9	8.1	3%	6%	3.3%	4.1%	1665.5	1713.6	77.2	79.6	112.0	115.2
Cairn Homes	1.92	0.20	0.23	9.4	8.5	5.9	6.1	0%	18%	4.7%	5.2%	946.3	1045.0	162.6	177.7	167.1	182.6
Coca-Cola HBC	3618.00	2.66	2.86	15.6	14.5	9.8	9.1	4%	5%	2.8%	3.0%	11597.4	12264.7	1337.9	1444.4	1748.7	1872.1
Compass Group	2523.00	1.31	1.43	25.8	23.6	15.1	14.1	3%	3%	1.9%	2.1%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
Cranswick	4970.00	273.41	292.01	17.3	17.0	9.2	8.6	3%	3%	2.1%	2.1%	2723.3	2942.6	190.8	220.0	293.2	315.2
CRH	113.67	544.93	605.90	20.9	18.8	12.1	11.4	7%	8%	1.3%	1.4%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5
Dalata Hotel Group	6.41																
DCC	4736.00	401.60	433.35	13.4	10.9	8.1	6.7	8%	12%	3.8%	4.6%	18011.1	14959.5	439.6	521.4	784.0	787.9
Devolver Digital	27.00	0.14	0.70	252.5	51.7	12.1	8.1	7%	6%	0.0%	0.0%	109.6	118.9	0.6	4.4	5.2	9.0
Diageo	1749.00	1.66	1.72	18.0	13.7	12.1	11.1	6%	6%	3.5%	4.4%	20245.0	20581.4	5897.0	6124.6	7422.0	6735.5
Dole	13.15	129.83	141.67	10.1	9.3	4.8	4.3	8%	13%	2.6%	2.7%	8685.2	8802.1	283.7	296.5	393.1	408.0
easyJet	455.30	69.60	78.55	6.5	5.8	2.1	1.8	19%	11%	3.1%	3.4%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	901.40	45.45	66.86	19.8	13.5	8.9	8.3	5%	6%	2.2%	2.3%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	52.60	11.35	17.65	4.6	3.0	5.4	4.6	32%	45%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	14.10	1.66	FALSE	8.5	FALSE	1.2	FALSE			8.9%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	864.00	24.15	29.72	35.8	29.1	19.9	17.4	4%	4%	2.1%	2.2%	374.5	412.0	30.9	37.0	44.9	52.0
Flutter Entertainment	278.35	8.04	12.13	34.6	22.9	18.2	13.8	3%	4%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	183.60	13.07	14.50	14.1	12.7	7.8	6.2	7%	12%	3.1%	3.7%	380.9	413.7	41.4	49.9	62.4	74.3
Frontier Developments	426.00	587.49	849.11	0.7	0.5	4.3	3.9	5%	2%	0.0%	0.0%	90.6	96.6	5.7	9.1	36.0	38.4
Fuller, Smith & Turner	562.00	34.22	40.26	19.2	14.0	8.6	7.6	nm	5%	3.0%	3.9%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop Group	14560.00	525.16	561.13	27.7	25.9	17.3	16.1	4%	4%	3.2%	3.4%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	16.51	1.32	1.42	12.5	11.6	9.8	8.7	7%	8%	2.7%	3.0%	3871.8	3900.0	353.2	387.3	502.6	536.3
Glenveagh Properties	1.88	0.20	0.21	9.6	8.9	11.1	9.7	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9
Grafton Group	906.90	70.31	75.86	12.9	12.0	6.4	5.9	4%	7%	4.2%	4.4%	2525.1	2640.5	157.0	171.0	306.0	324.0
Greencoat Renewables	0.72	0.14	0.14	5.0	5.0	13.6	14.9	19%	20%	9.8%	10.3%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	224.50																
Greggs	1596.00	129.34	132.76	12.3	12.0	5.9	5.5	nm	4%	4.1%	4.2%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerson	285.80																
Heidelberg Materials	195.45	10.42	FALSE	18.8	FALSE	10.2	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	115.00	0.11	0.15	11.8	9.1	7.4	5.4	10%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	831.50	46.32	50.52	18.0	16.5	9.8	9.3	4%	5%	2.9%	3.3%	2418.6	2512.5	340.3	365.0	498.8	528.4
IAG	381.70	0.66	0.75	6.6	5.8	2.9	2.5	16%	20%	2.7%	3.4%	33522.1	34437.3	4950.0	5227.8	7569.5	8103.3
Ibstock	135.80	7.29	12.30	18.6	11.0	9.2	6.5	2%	11%	2.9%	4.6%	389.0	435.8	43.7	67.5	78.8	106.3
ICG	5.76	0.40	0.44	14.4	13.1	7.5	7.0	11%	4%	2.8%	3.0%	633.6	664.4	74.1	79.3	143.1	148.3
IRES REIT	0.96	0.06	0.13	16.1	7.2	0.7	0.0	2%	3%	4.8%	5.2%	65.7	67.6	54.7	92.0	52.0	89.4
J D Wetherspoon	682.00	50.97	58.99	13.4	11.6	8.1	7.7	2%	4%	1.8%	1.8%	2117.8	2229.4	141.4	153.0	249.6	261.7
Jet2	1367.00	217.83	194.54	6.6	7.0	1.5	1.3	23%	14%	1.1%	1.4%	7173.5	7565.2	446.5	450.6	728.6	782.8
Kainos Group	893.00	30.50	36.18	29.3	24.7	17.9	15.0	5%	6%	2.7%	2.8%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	75.75	4.90	5.41	15.4	14.0	11.7	10.7	5%	5%	1.8%	2.0%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5
Kingfisher	301.00	20.41	19.97	12.9	15.1	5.5	5.8	10%	8%	4.7%	4.1%	12784.0	12842.4	628.0	608.8	1299.0	1272.8
Kingspan	70.85	3.83	4.15	18.5	17.1	12.4	11.6	4%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	7.75	1.14	1.29	6.8	6.0	6.9	6.3	18%	19%	4.4%	5.0%	39502.4	41427.8	2001.1	2229.4	3317.0	3622.3
Marston's	39.20	7.80	8.74	5.0	4.5	7.3	6.8	16%	17%	0.0%	0.0%	916.7	941.4	159.2			