

Goodbody Market Commentary Metrics



02 October 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
All Group	11.10	0.88	0.96	12.5	11.6	1.6	1.6			4.9%	5.3%	4660.1	4797.3	2307.3	2381.2		
Air France-KLM	11.35	4.51	5.21	2.5	2.2	3.5	3.4	64%	74%	0.0%	0.0%	35737.5	36004.9	1676.9	1861.4	4879.9	5226.5
Applied Nutrition	267.50	12.46	13.79	21.5	19.4	15.0	12.9	1%	3%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
B&M European Value Re	251.80	22.22	22.93	10.2	11.0	6.5	6.7	12%	8%	4.2%	4.4%	5775.0	5999.3	350.0	370.3	458.0	470.3
Bank of Ireland	18.77	1.63	1.89	11.5	9.9	1.4	1.3			4.3%	5.1%	4419.1	4631.9	1888.5	2098.4		
Barratt Redrow	317.70	26.43	25.32	13.0	12.5	0.6	0.5	9%	1%	1.7%	0.9%	6055.0	6263.4	556.5	488.7	569.1	507.6
Beauty Tech Group	470.00	26.78	31.87	17.6	14.7	9.6	8.3	6%	8%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Belway	2094.00	182.17	154.83	11.5	13.5	0.7	0.7	13%	nm	3.6%	4.4%	3147.6	3196.8	322.4	269.3	325.4	272.3
Berkley Group	3190.00	330.87	266.33	11.7	12.0	1.0	0.8	8%	8%	3.1%	2.8%	2383.1	2053.5	449.8	352.1	446.8	388.1
Breedon Group	317.00	29.54	33.09	10.7	9.6	5.6	5.4	9%	10%	5.0%	5.2%	1792.6	1860.8	142.0	154.8	282.1	299.4
C & C Group	97.90	0.10	0.10	16.6	11.5	8.9	7.3	0%	5%	3.4%	5.0%	1569.8	1479.0	70.5	70.5	104.3	104.3
Carm Homes	2.63	0.23	0.25	11.6	10.3	8.2	7.7	4%	8%	4.4%	4.8%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4206.00	2.93	3.16	16.8	15.6	10.1	9.3	4%	4%	2.6%	2.8%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2
Compass Group	29.18	1.47	1.62	19.8	18.1	11.0	10.2	4%	4%	2.5%	2.8%	50464.4	53759.5	3734.7	4055.5	5109.0	5447.0
Cranwick	5030.00	381.74	322.29	17.0	15.6	8.9	7.7	3%	3%	2.2%	2.3%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	81.70	552.22	614.51	14.8	13.3	8.9	8.0	10%	13%	1.9%	2.0%	39615.9	41672.2	5747.4	6319.5	7993.5	8668.8
CVC	6430.00	437.42	511.23	11.0	12.6	5.3	7.6	12%	8%	4.5%	3.5%	15441.9	18336.2	494.4	563.5	779.3	807.0
Dapag	1598.00	1.65	1.68	13.9	12.6	11.3	10.3	8%	6%	2.2%	2.8%	19643.0	18729.9	5901.0	5851.2	6674.0	6334.0
Dole	12.64	129.66	139.84	9.7	9.0	5.2	4.8	10%	14%	2.6%	2.8%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	677.20	8.17	18.19	82.9	37.2	5.8	5.1	nm	nm	2.3%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Entain	411.00	56.06	63.78	7.3	6.4	6.7	6.2	10%	14%	5.0%	5.3%	5121.6	5318.1	666.9	735.3	956.9	1010.6
Evolve	43.15	17.65	FALSE	2.4	FALSE	4.5	FALSE	55%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	18.80	1.47	1.57	12.8	12.0	1.4	1.5										
Fever-Tree Drinks	832.50	29.41	40.57	28.3	20.5	16.5	12.4	4%	7%	2.2%	2.3%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	79.47	4.92	7.08	15.5	10.8	9.4	7.4	4%	7%	0.0%	0.0%	17842.4	19245.8	1841.7	2386.3	2572.3	3156.1
Forterra	150.60	10.46	11.91	14.4	12.6	7.7	6.5	3%	10%	3.5%	4.0%	369.7	391.4	33.8	38.1	54.1	59.6
Fuller, Smith & Turner	710.00	47.18	52.77	13.3	13.6	7.3	7.9	7%	6%	3.4%	3.2%	397.8	413.3	40.8	48.3	74.6	77.7
Glanbia	21.02	1.61	1.76	13.0	11.9	9.7	8.6	6%	7%	2.2%	2.5%	4223.7	4441.5	435.7	472.9	553.9	590.3
Glanvagh Properties	2.34	0.21	0.23	11.1	10.2	8.3	7.1	15%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	945.20	74.47	84.04	12.7	11.2	6.3	5.7	5%	8%	4.1%	4.2%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.78	0.05	FALSE	15.2	FALSE	20.9	FALSE	17%	FALSE	8.9%	FALSE	30.0	FALSE	100.7	FALSE	66.7	FALSE
Greencore	249.00	20.07	24.02	12.4	10.4	8.0	5.9	9%	11%	1.1%	1.9%	3374.4	4091.1	191.2	248.5	336.3	429.9
Group	1988.00	126.55	127.20	15.7	15.6	6.5	6.1	5%	6%	3.5%	3.5%	2283.1	2407.4	197.7	198.4	377.1	399.5
Hammerman	329.60	23.21	25.54	14.2	12.9	9.0	8.4	3%	5%	5.4%	5.7%	227.4	247.5	190.0	203.2	188.6	203.1
Hastellens Materials	145.70	12.79	14.44	11.4	10.1	7.3	6.5	10%	10%	2.7%	3.0%	22179.1	23585.4	3476.8	3856.3	4850.8	5280.2
Hostelworld Group	102.00	0.13	0.18	9.3	6.8	6.0	4.1	13%	20%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	749.00	52.56	56.26	14.3	13.3	8.6	7.8	6%	7%	3.0%	3.2%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	432.20	0.61	0.77	8.4	6.6	4.0	3.6	11%	9%	2.1%	2.2%	33801.5	35574.1	4244.1	4903.0	6855.6	7655.9
Ibstock	81.90	-3.63	5.35	nm	15.3	8.3	7.0	9%	8%	1.4%	3.3%	368.8	390.7	14.5	37.1	58.8	68.3
ICI	7.94																
IBES REIT	1.29	0.16	0.15	8.2	8.5	0.9	0.8	2%	2%	4.2%	4.6%	68.2	72.7	105.0	104.9	102.4	102.4
I D Wetherspoon	813.00	39.18	48.69	20.8	16.7	8.5	8.0	7%	7%	1.5%	1.5%	2222.7	2324.0	129.9	131.3	235.9	246.8
Jet2	1421.00	208.16	160.30	7.0	8.9	1.1	1.7	19%	2%	1.1%	1.4%	7482.1	8060.1	439.6	258.2	732.5	592.5
Kerry Group	84.10	5.14	5.71	16.4	14.7	12.3	11.1	5%	5%	1.8%	2.0%	6861.7	7234.1	952.5	1039.6	1265.9	1357.5
Kingfisher	327.50	23.42	25.14	12.1	13.0	5.3	5.4	10%	8%	4.4%	3.8%	12945.0	12269.6	651.0	687.4	1327.0	1353.7
Kingspan	99.70	4.40	5.73	22.7	17.4	14.8	11.6	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	25.03	0.00	2.23	nm	11.2	8.4	7.7	7%	9%	2.3%	2.8%	2411.0	2578.1	767.7	846.3	965.5	1055.3
Lufthansa	7.59	0.97	1.07	7.8	7.1	7.9	7.5	23%	17%	3.8%	4.2%	42165.6	42688.5	1640.1	1942.4	2981.2	3180.3
Marston's	45.50	8.78	9.99	5.2	4.6	6.9	6.5	18%	17%	0.0%	4.4%	900.3	916.6	164.6	170.4	210.0	215.8
Mitchells & Butlers	282.50	31.43	33.14	9.0	8.5	6.2	5.8	4%	5%	0.0%	0.0%	2792.4	2886.1	331.2	360.0	470.4	483.3
Morrell	797.40	0.51	0.63	18.5	14.8	8.8	7.2	nm	3%	1.9%	3.4%	8403.7	8758.3	369.9	542.3	860.1	1044.3
Origin Enterprises	3.95	0.54	0.55	7.4	7.2	5.2	4.7	nm	13%	4.6%	4.8%	2166.0	2268.3	86.3	87.5	118.2	121.3
Permanent TSB	2.97	0.23	0.27	13.2	10.9	0.7	0.7			2.4%	4.0%	708.5	762.2	191.4	219.9		
Persimmon	1248.00	99.27	99.14	12.6	12.6	1.1	1.0	nm	5%	3.2%	3.4%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	372.00	0.37	0.31	11.7	14.2	1.0	0.9	7%	6%	0.0%	0.0%	823.2	857.2	174.9	153.2	276.6	259.9
Rank Group	74.30	9.81	10.33	7.6	7.2	4.0	3.8	6%	10%	4.0%	4.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	22.98	2.12	1.72	11.9	13.4	6.5	6.5	6%	5%	1.7%	2.0%	15544.3	15876.0	2459.2	1983.3	3832.6	3543.4
Sainsbury's	4.24	2.05	3.22	21.0	13.4	7.1	6.1	6%	8%	4.3%	4.6%	32928.6	34602.3	2193.5	2952.5	5076.6	5815.7
SSP Group	188.30	13.90	16.67	13.5	11.3	6.7	6.4	5%	6%	2.7%	3.1%	3025.4	3973.6	297.7	330.3	635.0	677.8
Tate & Lyle	558.50	40.50	36.60	11.2	15.3	7.4	8.6	8%	7%	4.4%	3.5%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	81.30	5.25	5.52	15.5	14.7	0.7	0.7	4%	2%	3.0%	3.3%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	584.50	27.84	33.49	20.9	17.5	6.8	6.3	7%	3%	2.1%	2.4%	4520.8	4628.6	116.2	132.9	267.6	289.7
Uniphar	3.98	0.27	0.28	14.7	14.2	9.0	6.5	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Viatry Group	250.00	43.09	49.03	5.8	5.1	2.1	1.4	44%	29%	0.0%	0.0%	3784.1	3942.4	276.8	290.5	348.2	397.2
Wii Smith	371.20	39.84	36.41	9.3	10.2	5.2	5.1	nm	3%	0.0%	0.0%	1627.2	1634.1	107.9	112.0	162.4	165.9
Whitbread	238.00																
Winkles Group	199.20	30.98	24.54	9.5	8.1	5.1	4.5	4%	9%	6.0%	7.0%	1684.9	1766.1	81.1	90.0	202.5	219.5
Wizz Air	1030.00	0.01	-4.23	1426.2	nm	8.0	7.7	47%	25%	0.0%	0.0%	5691.4	6637.7	139.7	-472.3	1318.3	891.8

Closing prices as of: 01/10/2026