Goodbody Market Commentary Metrics

Goodbody

04 November 2026																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	lc	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	10.91	0.88	0.99	12.3	11.0	1.6	1.6			4.9%	5.4%	4660.1	4857.7	2307.3	2460.7		
Air France-KLM	10.86	4.16	4.92	2.6	2.2	3.5	3.4	65%	77%	0.0%	0.0%	35447.1	37354.2	1569.0	1773.5	4773.2	5149.4
Applied Nutrition	299.00	12.46	13.79	24.0	21.7	16.9	14.5	1%	2%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
B&M European Value Re	273.20	22.22	22.93	10.2	11.9	6.5	7.2	12%	7%	4.2%	4.0%	5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	18.22	1.62	1.85	11.2	9.8	1.3	1.3			4.4%	5.2%	4419.1	4656.0	1888.5	2068.5		
Barratt Redrow	319.00	26.43	25.32	13.0	12.6	0.6	0.6	9%	1%	1.7%	0.9%	6055.0	6263.4	556.5	488.7	569.1	507.6
Beauty Tech Group	510.00	26.78	31.87	19.0	16.0	10.6	9.1	6%	8%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Bellway	2246.00	182.89	136.40	12.8	16.5	0.8	0.7	12%	0%	3.6%	3.3%	3162.2	3016.6	320.0	242.2	326.5	245.7
Berkeley Group	3644.00	330.87	266.33	11.7	13.7	1.0	0.9	8%	7%	3.1%	1.8%	2383.3	2053.5	449.8	352.1	446.8	348.1
Breedon Group	337.40	29.54	33.09	11.4	10.2	6.2	5.6	9%	10%	4.7%	4.9%	1792.6	1869.8	142.0	154.8	282.1	299.4
C & C Group	107.00	0.10	0.10	16.6	12.7	8.9	7.7	0%	5%	3.4%	4.7%	1569.8	1534.9	70.5	70.8	104.3	104.6
Cairn Homes	2.80	0.24	0.26	11.9	10.6	8.5	7.9	6%	6%	4.1%	4.5%	1080.5	1207.4	185.0	200.4	187.2	203.1
Coca-Cola HBC	4766.00	2.91	3.18	19.6	18.0	13.0	10.1	3%	3%	2.3%	2.5%	12502.8	16751.0	1494.6	1883.4	1908.0	2437.1
Compass Group	33.50	1.47	1.62	22.7	20.7	12.4	11.6	4%	4%	2.2%	2.4%	50464.4	53759.5	3734.7	4055.5	5109.0	5447.0
Cranswick	5370.00	301.74	322.29	17.0	16.7	8.9	8.2	3%	3%	2.2%	2.2%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	93.53	552.22	614.51	16.9	15.2	9.9	8.9	9%	11%	1.7%	1.7%	39615.9	41672.2	5747.4	6319.5	7993.5	8668.8
DCC	6455.00	437.42	511.23	11.0	12.6	6.3	7.6	12%	9%	4.5%	3.5%	15441.9	16336.2	494.4	563.5	778.3	807.0
Diageo	1763.00	1.65	1.64	13.9	14.4	11.3	11.3	8%	6%	2.2%	2.4%	19643.0	18439.1	5901.0	5788.6	6674.0	6260.4
Dole	13.08	129.66	139.84	10.1	9.4	5.3	4.9	9%	13%	2.5%	2.7%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	679.80	8.17	18.19	83.2	37.4	5.8	5.1	nm	nm	2.3%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Entain	479.10	56.06	63.78	8.5	7.5	7.1	6.6	9%	12%	4.3%	4.5%	5121.6	5318.1	666.9	735.3	956.9	1010.6
Evoke	47.00	17.65	FALSE	2.7	FALSE	4.5	FALSE	51%	FALSE	0.0%	FALSE	1929.0	FALSE	267.2	FALSE	397.2	FALSE
FBD Holdings	19.50	1.47	1.57	13.2	12.4	1.5	1.5										
Fever-Tree Drinks	921.00	29.41	40.57	31.3	22.7	18.4	14.1	4%	6%	2.0%	2.1%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	83.74	4.92	7.08	17.0	11.8	9.9	7.8	4%	6%	0.0%	0.0%	17842.4	19245.6	1841.7	2386.3	2573.2	3156.1
Forterra	162.00	10.60	12.33	15.3	13.1	8.0	6.9	9%	10%	3.3%	3.8%	341.5	361.5	33.9	39.1	54.4	59.7
Fuller, Smith & Turner	812.00	47.18	53.64	13.3	15.1	7.3	8.7	7%	6%	3.4%	2.9%	397.8	428.7	40.8	50.4	74.6	80.8
Glanbia	22.06	1.61	1.76	13.7	12.5	10.1	9.0	6%	7%	2.1%	2.4%	4223.7	4441.5	435.7	472.9	553.9	590.3
Glenveagh Properties	2.47	0.21	0.24	11.7	10.4	13.5	12.3	10%	10%	0.0%	0.0%	1082.0	1146.5	147.8	151.6	151.6	155.6
Grafton Group	1020.00	74.47	84.04	13.7	12.1	6.7	6.1	5%	8%	3.8%	3.9%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.80	0.05	FALSE	15.6	FALSE	21.1	FALSE	17%	FALSE	8.6%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	296.00	21.86	25.57	13.5	11.6	8.9	6.8	11%	9%	1.0%	1.7%	3378.1	4142.6	203.1	256.0	348.1	437.5
Greggs	2328.00	130.24	128.16	17.9	18.2	7.3	6.9	4%	5%	3.0%	3.0%	2303.8	2441.5	202.8	199.9	382.2	401.3
Hammerson	358.40	23.21	25.54	15.4	14.0	1.0	0.9	3%	4%	4.9%	5.3%	227.4	247.5	190.0	203.2	188.6	203.1
Heidelberg Materials	156.55	12.79	14.44	12.2	10.8	7.7	6.9	9%	9%	2.5%	2.8%	22179.1	23585.4	3476.8	3856.3	4850.8	5280.2
Hostelworld Group	82.00	0.13	0.15	7.8	6.4	5.3	4.5	14%	17%	0.0%	0.0%	103.2	108.4	9.3	11.0	20.5	21.8
Howden Joinery	825.00	52.56	56.26	15.7	14.7	9.3	8.5	5%	6%	2.7%	2.9%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	417.30	0.60	0.72	8.4	7.0	4.1	3.7	11%	10%	2.1%	2.3%	34056.4	36801.4	4104.8	4620.5	6716.2	7373.4
Ibstock	73.85	-6.20	2.16	nm	34.3	10.6	9.9	6%	3%	0.7%	0.0%	334.7	355.3	-0.3	19.0	44.1	47.5
ICG	7.96																
IRES REIT	1.30	0.16	0.15	8.3	8.6	0.9	0.9	2%	2%	4.2%	4.5%	68.2	72.7	105.0	104.9	102.4	102.4
J D Wetherspoon	1025.00	39.83	52.88	17.0	19.4	7.6	8.4	15%	7%	1.8%	1.2%	2238.0	2416.9	120.2	137.1	240.1	257.5
Jet2	1453.00	208.16	160.30	7.0	9.1	1.1	1.8	19%	2%	1.1%	1.3%	7482.1	8060.1	439.6	258.2	732.5	592.9
Kerry Group	98.50	5.18	5.80	19.0	17.0	14.1	12.8	4%	4%	1.6%	1.7%	6908.1	7365.3	956.2	1059.1	1269.6	1377.1
Kingfisher	362.80	23.42	26.27	12.1	13.8	5.3	5.7	10%	8%	4.4%	3.4%	12945.0	13088.1	651.0	711.9	1327.0	1373.3
Kingspan	97.00	4.40	5.73	22.1	16.9	14.6	11.3	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	26.81	1.79	2.21	15.0	12.2	9.1	8.2	6%	8%	2.1%	2.6%	2371.9	2558.5	741.7	838.4	936.9	1046.0
Lufthansa	7.76	0.91	1.02	8.6	7.6	8.2	7.6	21%	17%	3.5%	3.9%	42236.5	44626.2	1540.1	1859.0	2886.0	3172.0
Marston's	57.20	9.74	10.27	5.9	5.6	7.2	6.9	13%	12%	0.0%	0.0%	887.4	900.4	166.2	171.2	211.7	216.6
Mitchells & Butlers	318.00	31.43	33.14	10.1	9.6	6.6	6.3	4%	5%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3
Mondi	770.00	0.23	0.55	40.3	16.8	9.7	7.7	nm	2%	2.0%	3.0%	8221.5	8606.0	306.9	491.0	786.5	984.3
Origin Enterprises	4.11	0.54	0.55	7.7	7.5	5.3	4.9	nm	13%	4.4%	4.6%	2166.0	2268.3	86.3	87.5	118.2	121.3
Permanent TSB	2.95	0.23	0.27	13.1	10.9	0.7	0.7			2.4%	4.1%	708.5	762.2	191.4	219.9		
Persimmon	1276.50	99.27	99.14	12.9	12.9	1.1	1.1	nm	5%	3.1%	3.3%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	361.60	0.37	0.31	11.6	14.1	1.0	0.9	7%	6%	0.0%	0.0%	823.2	857.2	174.9	153.2	276.6	259.9
Rank Group	90.60	11.15	8.99	10.1	10.1	4.9	4.4	2%	4%	3.1%	3.2%	834.4	881.7	78.0	69.4	137.7	131.8
Ryanair	23.90	2.12	1.61	11.9	14.8	6.5	7.2	6%	3%	1.7%	1.9%	15544.3	15856.5	2459.2	1855.6	3832.6	3415.6
Smurfit Westrock	43.42	2.05	3.22	21.2	13.5	7.1	6.1	6%	8%	4.2%	4.5%	32928.6	34602.3	2193.5	2952.5	5076.0	5815.7
SSP Group	187.50	13.95	16.06	13.4	11.7	6.7	6.6	3%	5%	2.7%	3.0%	3816.7	3930.1	288.6	317.2	625.1	652.2
Tate & Lyle	563.00	40.50	36.60	11.2	15.4	7.4	8.6	8%	7%	4.4%	3.5%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	82.46	5.25	5.52	15.7	14.9	0.7	0.7	4%	2%	2.9%	3.3%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	632.50	27.83	34.74	22.7	18.2	7.2	6.5	6%	3%	1.9%	2.2%	4507.3	4632.9	115.9	136.8	267.2	293.6
Uniphar	4.14	0.27	0.28	15.3	14.8	9.2	6.8	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Vistry Group	283.40	27.44	34.46	10.3	8.2	1.1	1.2	84%	68%	0.0%	3.5%	3999.4	3186.7	193.8	235.2	907.5	739.1
WH Smith	429.00	39.84	36.41	10.8	11.8	5.7	5.5	nm	3%	0.0%	0.0%	1627.2	1634.1	107.9	112.0	162.4	165.9
Whitbread	2780.00																
Wickes Group	237.50	21.03	24.54	11.3	9.7	5.6	5.0	3%	8%	4.6%	5.1%	1684.9	1766.1	81.1	90.0	203.4	219.4
Wizz Air	1008.00	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: 03/11/2026