Goodbody Market Commentary Metrics

Goodbody

06 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	11.53	0.88	0.99	13.0	11.7	1.7	1.7			4.7%	5.1%	4660.1	4857.7	2307.3	2460.7		
Air France-KLM	12.64	4.16	4.92	3.0	2.6	3.6	3.5	56%	66%	0.0%	0.0%	35447.1	37354.2	1569.0	1773.5	4773.2	5149.4
Applied Nutrition	304.00	12.46	13.79	24.4	22.0	17.1	14.8	1%	2%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
B&M European Value Re	283.80	22.22	22.93	10.2	12.4	6.5	7.4	12%	7%	4.2%	3.9%	5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	19.28	1.62	1.85	11.9	10.4	1.4	1.3			4.1%	4.9%	4419.1	4656.0	1888.5	2068.5		
Barratt Redrow	331.20	26.43	23.68	13.0	14.0	0.6	0.6	9%	2%	1.7%	0.9%	6055.0	6032.3	556.5	458.7	569.1	477.6
Beauty Tech Group	516.00	26.78	31.87	19.3	16.2	10.7	9.2	6%	8%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Bellway	2300.00	182.89	136.40	12.8	16.9	0.8	0.8	12%	0%	3.6%	3.2%	3162.2	3016.6	320.0	242.2	326.5	245.7
Berkeley Group	3738.00	330.87	266.33	11.7	14.0	1.0	0.9	8%	7%	3.1%	1.7%	2383.3	2053.5	449.8	352.1	446.8	348.1
Breedon Group	345.40	33.08	34.96	10.4	9.9	6.7	6.2	5%	9%	4.6%	4.6%	1789.4	1883.1	148.6	155.8	272.4	284.8
C & C Group	106.20	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	2.78	0.24	0.26	11.8	10.6	8.4	7.8	6%	6%	4.1%	4.5%	1080.5	1207.4	185.0	200.4	187.2	203.1
Coca-Cola HBC	4052.00	2.91	3.18	16.7	15.3	11.3	8.8	4%	3%	2.7%	2.9%	12502.8	16751.0	1494.6	1883.4	1908.0	2437.1
Compass Group	34.11	1.47	1.62	23.1	21.1	12.7	11.8	4%	4%	2.2%	2.4%	50464.4	53759.5	3734.7	4055.5	5109.0	5447.0
Cranswick	5530.00	301.74	322.29	17.0	17.2	8.9	8.5	3%	3%	2.2%	2.1%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	95.45	491.11	577.20	19.4	16.5	11.1	10.1	10%	11%	1.6%	1.7%	39298.3	42730.2	5629.1	6171.9	7850.0	8689.0
DCC	6460.00	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	1871.50	1.65	1.64	13.9	15.3	11.3	11.8	8%	5%	2.2%	2.3%	19643.0	18439.1	5901.0	5788.6	6674.0	6260.4
Dole	13.84	129.66	139.84	10.7	9.9	5.5	5.0	9%	13%	2.3%	2.5%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	690.00	8.17	18.19	84.5	37.9	5.9	5.2	nm	nm	2.2%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Entain	489.90	56.06	63.78	8.7	7.7	7.2	6.7	8%	12%	4.2%	4.4%	5121.6	5318.1	666.9	735.3	956.9	1010.6
Evoke	45.75	17.65	FALSE	2.6	FALSE	4.5	FALSE	52%	FALSE	0.0%	FALSE	1929.0	FALSE	267.2	FALSE	397.2	FALSE
FBD Holdings	19.80	1.47	1.57	13.4	12.6	1.5	1.5										
Fever-Tree Drinks	925.50	29.41	40.57	31.5	22.8	18.5	14.2	4%	6%	2.0%	2.1%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	82.97	4.92	7.08	16.9	11.7	9.8	7.8	4%	6%	0.0%	0.0%	17842.4	19245.6	1841.7	2386.3	2573.2	3156.1
Forterra	167.40	10.60	12.33	15.8	13.6	8.2	7.1	9%	9%	3.2%	3.7%	341.5	361.5	33.9	39.1	54.4	59.7
Fuller, Smith & Turner	840.00	47.18	53.64	13.3	15.7	7.3	8.9	7%	6%	3.4%	2.8%	397.8	428.7	40.8	50.4	74.6	80.8
Glanbia	23.82	1.61	1.76	14.8	13.5	10.9	9.7	6%	6%	2.0%	2.2%	4223.7	4441.5	435.7	472.9	553.9	590.3
Glenveagh Properties	2.49	0.21	0.24	11.8	10.5	13.5	12.3	10%	10%	0.0%	0.0%	1082.0	1146.5	147.8	151.6	151.6	155.6
Grafton Group	1049.60	74.47	84.04	14.1	12.5	6.8	6.3	5%	7%	3.7%	3.8%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.82	0.05	FALSE	15.9	FALSE	21.3	FALSE	16%	FALSE	8.4%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	302.00	21.86	25.57	13.8	11.8	9.0	6.9	11%	9%	0.9%	1.7%	3378.1	4142.6	203.1	256.0	348.1	437.5
Greggs	2388.00	130.24	128.16	18.3	18.6	7.5	7.0	4%	5%	2.9%	2.9%	2303.8	2441.5	202.8	199.9	382.2	401.3
Hammerson	359.20	23.21	25.54	15.5	14.1	1.0	0.9	3%	4%	4.9%	5.3%	227.4	247.5	190.0	203.2	188.6	203.1
Heidelberg Materials	175.05	12.79	14.44	13.7	12.1	8.3	7.5	8%	8%	2.3%	2.5%	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	858.50	52.56	56.26	16.3	15.3	9.6	8.8	5%	6%	2.6%	2.8%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	427.20	0.60	0.72	8.6	7.2	4.2	3.8	11%	10%	2.0%	2.2%	34056.4	36801.4	4104.8	4620.5	6716.2	7373.4
Ibstock	77.65	-6.20	2.16	nm	36.0	11.0	10.2	6%	3%	0.6%	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	1038.00	39.83	52.88	17.0	19.6	7.6	8.5	15%	7%	1.8%	1.2%	2238.0	2416.9	120.2	137.1	240.1	257.5
Jet2	1484.00	208.16	160.30	7.0	9.3	1.1	1.9	19%	2%	1.1%	1.3%	7482.1	8060.1	439.6	258.2	732.5	592.9
Kerry Group	100.80	5.18	5.80	19.5	17.4	14.4	13.1	4%	4%	1.5%	1.7%	6908.1	7365.3	956.2	1059.1	1269.6	1377.1
Kingfisher	379.30	23.42	26.27	12.1	14.4	5.3	5.9	10%	8%	4.4%	3.3%	12945.0	13088.1	651.0	711.9	1327.0	1373.3
Kingspan	93.40	4.40	5.73	21.3	16.3	14.1	10.9	3%	4%	0.7%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	27.49	1.79	2.21	15.4	12.5	9.3	8.3	6%	8%	2.0%	2.5%	2371.9	2558.5	741.7	838.4	936.9	1046.0
Lufthansa	8.19	1.08	1.01	7.6	8.1	8.0	8.0	21%	16%	4.0%	3.7%	42420.4	45595.1	1804.0	1841.0	3010.1	3085.7
Marston's	58.70	9.74	10.27	6.0	5.7	7.2	6.9	12%	11%	0.0%	0.0%	887.4	900.4	166.2	171.2	211.7	216.6
Mitchells & Butlers	324.00	31.43	33.14	10.3	9.8	6.7	6.3	4%	5%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3
Mondi	793.80	0.23	0.55	41.6	17.3	9.9	7.9	nm	2%	1.9%	2.9%	8221.5	8606.0	306.9	491.0	786.5	984.3
Origin Enterprises	4.08	0.54	0.55	7.6	7.4	5.3	4.9	nm	13%	4.5%	4.7%	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	1302.50	99.27	99.14	13.1	13.1	1.1	1.1	nm	5%	3.1%	3.2%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	369.00	0.37	0.31	11.9	14.4	1.0	0.9	7%	6%	0.0%	0.0%	823.2	857.2	174.9	153.2	276.6	259.9
Rank Group	93.90	11.15	8.99	10.1	10.4	4.9	4.5	2%	4%	3.1%	3.1%	834.4	881.7	78.0	69.4	137.7	131.8
Ryanair	24.98	2.12	1.61	11.9	15.5	6.5	7.5	6%	3%	1.7%	1.8%	15544.3	15856.5	2459.2	1855.6	3832.6	3415.6
Smurfit Westrock	44.51	1.60	2.80	27.8	15.9	7.8	6.5	4%	11%	4.1%	4.4%	32233.2	34386.8	1859.3	2661.8	4736.9	5523.5
SSP Group	190.00	13.95	16.06	13.6	11.8	6.7	6.6	3%	4%	2.7%	3.0%	3816.7	3930.1	288.6	317.2	625.1	652.2
Tate & Lyle	562.00	40.50	34.68	11.2	16.2	7.4	9.0	6%	5%	4.4%	3.5%	2006.0	2039.5	287.0	256.3	415.0	389.5
Taylor Wimpey	84.26	5.25	5.52	16.0	15.3	0.7	0.7	4%	2%	2.8%	3.2%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	664.00	27.83	34.74	23.9	19.1	7.4	6.7	6%	3%	1.8%	2.1%	4507.3	4632.9	115.9	136.8	267.2	293.6
Uniphar	4.33	0.27	0.28	16.0	15.5	9.6	7.1	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Vistry Group	273.00	27.44	34.46	10.0	7.9	1.1	1.1	88%	71%	0.0%	3.7%	3999.4	3186.7	193.8	235.2	907.5	739.1
WH Smith	439.00	39.84	36.41	11.0	12.1	5.8	5.6	nm	3%	0.0%	0.0%	1627.2	1634.1	107.9	112.0	162.4	165.9
Whitbread	2835.00																
Wickes Group	244.00	21.03	24.54	11.6	9.9	5.6	5.0	3%	8%	4.5%	4.9%	1684.9	1766.1	81.1	90.0	203.4	219.4
Wizz Air	1038.00	0.01	-4.23	1426.2	nm	8.0	7.8	47%	24%	0.0%	0.0%	5691.4	6637.7	139.7	-472.3	1318.3	891.8

Closing prices as of: 05/11/2026