

Goodbody Market Commentary Metrics



08 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		
AlB Group	11.31	0.88	0.99	12.8	11.5	1.7	1.6			4.8%	5.2%	4660.1	4857.7	2307.3	2460.7		
Air France-KLM	11.20	4.51	5.21	2.5	2.1	3.5	3.4	65%	75%	0.0%	0.0%	35737.5	36004.9	1676.9	1861.4		
Applied Nutrition	268.00	12.46	13.79	21.5	19.4	15.1	12.9	1%	3%	0.0%	0.0%	160.4	205.3	41.8	49.2		
B&M European Value Re	255.60	22.22	22.93	10.2	11.1	6.5	6.8	12%	8%	4.2%	4.3%	5775.0	5999.3	350.0	371.6		
Bank of Ireland	18.90	1.62	1.85	11.6	10.2	1.4	1.3			4.2%	5.0%	4419.1	4656.0	1889.5	2068.5		
Barratt Redrow	300.10	26.43	25.32	13.0	11.9	0.6	0.5	9%	1%	1.7%	1.0%	6055.0	6263.4	556.5	597.6		
Beauty Tech Group	469.00	26.78	31.87	17.5	14.7	9.6	8.3	6%	8%	0.0%	0.0%	171.6	193.3	36.4	41.6		
Beitrey	2000.00	182.17	154.83	11.0	12.9	0.6	0.6	14%	nm	3.8%	4.6%	3147.6	3196.8	322.4	269.3		
Berkley Group	3192.00	330.87	266.33	11.7	12.0	1.0	0.8	8%	8%	3.1%	2.0%	2383.1	2053.5	449.8	352.1		
Breedon Group	304.20	29.54	33.09	10.7	9.2	5.8	5.2	10%	11%	5.2%	5.4%	1792.6	1860.8	142.0	154.8		
C & C Group	96.30	0.10	0.10	16.6	11.4	8.9	7.3	0%	5%	3.4%	5.1%	1569.8	1479.0	70.5	70.5		
Carm Homes	2.67	0.24	0.26	11.3	10.2	8.0	7.5	6%	6%	4.3%	4.7%	1080.5	1207.4	185.0	200.4		
Coca-Cola HBC	4248.00	2.91	3.18	17.3	15.8	11.6	9.1	3%	3%	2.6%	2.8%	12502.8	16751.0	1494.6	1883.4		
Compass Group	30.50	1.47	1.62	20.7	18.9	11.4	10.7	4%	4%	2.4%	2.7%	50464.4	53759.5	3734.7	4055.5		
Cranwick	4970.00	301.74	322.29	17.0	15.4	8.9	7.7	3%	3%	2.2%	2.4%	2982.5	3129.0	232.8	250.8		
CRH	81.46	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		
CVC	6440.00	437.42	511.23	11.0	12.6	5.3	7.6	12%	9%	4.5%	3.5%	15441.9	18336.2	494.4	563.5		
Dapag	1611.00	1.65	1.68	13.9	12.7	11.3	10.4	8%	6%	2.2%	2.8%	19643.0	18729.9	5901.0	5851.2		
Dole	12.80	129.66	139.84	9.9	9.2	5.2	4.8	10%	14%	2.5%	2.7%	9724.1	9837.0	261.9	270.8		
easyJet	679.60	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		
Enstain	411.30	56.06	63.78	7.4	6.5	6.7	6.2	10%	14%	5.0%	5.2%	5121.6	5310.1	666.9	735.3		
Evoke	42.70	17.65	FALSE	2.4	FALSE	4.5	FALSE	56%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE		
FBD Holdings	18.85	1.47	1.57	12.8	12.0	1.4	1.5										
Fever-Tree Drinks	840.00	29.41	40.57	28.6	20.7	16.7	12.8	4%	6%	2.2%	2.3%	402.6	440.9	36.8	51.9		
Flutter Entertainment	75.85	4.92	7.08	15.4	10.7	9.3	7.4	4%	7%	0.0%	0.0%	17842.4	19245.8	1841.7	2386.3		
Forterra	145.20	10.46	11.91	13.9	12.2	7.5	6.3	10%	10%	3.6%	4.1%	369.7	391.8	33.8	38.1		
Fuller, Smith & Turner	702.00	47.18	52.77	13.3	13.4	7.3	7.8	7%	6%	3.4%	3.3%	397.8	413.3	40.8	48.3		
Glanbia	21.55	1.61	1.76	13.4	12.2	9.9	8.8	6%	7%	2.2%	2.4%	4223.7	4441.5	435.7	472.9		
Glanvagh Properties	2.36	0.21	0.24	11.2	9.9	12.9	11.7	10%	10%	0.0%	0.0%	1082.0	1146.5	147.8	151.6		
Grafton Group	932.90	74.47	84.04	12.5	11.1	6.2	5.6	5%	8%	4.1%	4.2%	2696.2	2840.8	169.7	182.9		
Greencoat Renewables	0.79	0.05	FALSE	15.5	FALSE	21.0	FALSE	17%	FALSE	8.7%	FALSE	30.0	FALSE	100.7	FALSE		
Greencore	248.60	20.07	24.02	12.4	10.4	7.9	5.9	9%	11%	1.2%	1.9%	3374.4	4091.1	191.2	248.5		
Group	2028.00	126.55	127.20	16.4	16.3	6.7	6.3	4%	6%	3.3%	3.1%	2281.1	2407.4	192.7	198.4		
Hammerman	302.60	23.21	25.54	14.1	12.8	9.0	8.0	3%	5%	5.4%	5.8%	227.4	247.5	190.0	203.2		
Hastellens Materials	141.65	12.79	14.44	11.1	9.8	7.1	6.4	10%	10%	2.8%	3.1%	22179.1	23585.4	3476.8	3856.3		
Hostelworld Group	92.60	0.13	0.18	8.5	6.2	5.4	3.6	14%	22%	0.0%	0.0%	104.3	115.1	11.0	14.6		
Howden Joinery	754.50	52.56	56.26	14.4	13.4	8.6	7.9	6%	7%	3.0%	3.2%	2574.3	2735.6	390.3	423.3		
IAGI	432.80	0.61	0.77	8.4	6.7	4.1	3.6	11%	9%	2.1%	2.2%	33801.5	35574.1	4244.1	4903.0		
Ibstock	77.65	-3.63	5.35	nm	14.5	8.0	6.7	10%	9%	1.4%	3.4%	368.8	390.7	14.5	37.1		
ICI	7.94																
IBIS 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		
I D Wetherspoon	889.50	39.83	52.88	17.0	18.7	7.6	8.3	7%	7%	1.8%	1.2%	2236.0	2416.8	129.2	137.1		
Jet2	1420.00	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		
Kerry Group	87.40	5.14	5.71	17.0	15.3	12.7	11.5	4%	5%	1.8%	1.9%	6861.7	7234.1	952.5	1039.6		
Kingfisher	329.10	23.42	26.27	12.1	12.5	5.3	5.3	10%	9%	4.4%	3.8%	12845.0	13088.1	651.0	711.8		
Kingspan	99.60	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		
Lottomatica Group	24.31	0.00	2.23	nm	10.9	8.2	7.5	7%	9%	2.4%	2.9%	2411.0	2578.1	767.7	846.3		
Lufthansa	7.45	0.91	1.02	8.2	7.3	8.1	7.5	22%	18%	3.6%	4.1%	42236.5	44626.2	1540.1	1859.0		
Marston's	45.90	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		
Mitchells & Butlers	287.50	31.43	33.14	9.1	8.7	6.2	5.9	4%	5%	0.0%	0.0%	2792.4	2886.1	331.2	360.0		
Mondi	776.40	0.51	0.63	18.1	16.5	8.7	7.1	nm	3%	2.0%	3.5%	8403.7	8758.3	369.9	542.3		
Origin Enterprises	3.84	0.54	0.55	7.2	7.0	5.1	4.6	nm	14%	4.7%	5.0%	2166.0	2268.3	86.3	87.5		
Permanent TSB	2.99	0.23	0.27	13.3	11.0	0.7	0.7			2.3%	4.0%	708.5	762.2	191.4	219.9		
Persimmon	1222.00	99.27	99.14	12.3	12.3	1.0	1.0	nm	5%	3.3%	3.4%	4127.6	4344.5	485.1	489.5		
Playtech	358.80	0.37	0.31	11.4	11.8	0.9	0.9	7%	6%	0.0%	0.0%	823.2	857.2	174.9	153.2		
Rank Group	70.00	9.81	10.33	7.1	6.8	3.9	3.6	6%	11%	4.2%	4.7%	852.6	919.9	67.6	71.2		
Ryanair	23.98	2.12	1.72	11.9	13.9	6.5	6.9	6%	5%	1.7%	1.9%	15544.3	15876.0	2459.2	1983.3		
Sainsbury's	41.29	2.05	3.22	20.1	12.8	6.9	5.9	7%	8%	4.4%	4.7%	32928.6	34602.3	2193.5	2952.5		
SSP Group	191.00	13.90	16.67	13.7	11.5	6.7	6.4	5%	6%	2.6%	3.1%	3025.4	3973.6	292.7	330.2		
Tate & Lyle	560.00	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		
Taylor Wimpey	77.10	5.25	5.52	14.7	14.0	0.7	0.7	4%	2%	3.1%	3.5%	3871.8	4095.9	287.9	296.1		
Travis Perkins	563.50	27.94	33.49	20.2	16.8	6.6	6.1	7%	3%	2.1%	2.5%	4520.8	4628.6	116.2	132.9		
Uniphar	4.00	0.27	0.28	14.8	14.3	9.0	6.5	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5		
Viatry Group	224.60	43.09	49.03	5.2	4.6	1.8	1.2	49%	33%	0.0%	0.0%	3784.1	3942.4	276.8	290.5		
Wii Smith	369.40	39.84	36.41	9.3	10.1	5.2	5.1	nm	3%	0.0%	0.0%	1627.2	1634.1	107.9	112.0		
Whitbread	2472.00																
Winkles Group	200.50	31.03	24.54	9.5	8.2	5.1	4.6	3%	9%	5.5%	6.0%	1684.9	1766.1	81.1	90.0		
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		

Closing prices as of: 07/10/2026