Goodbody Market Commentary Metrics

Goodbody

12 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	11.56	0.89	0.98	13.0	11.8	1.7	1.7			4.7%	5.1%	4676.2	4864.6	2314.4	2455.8		
Air France-KLM	14.56	4.16	4.92	3.5	3.0	3.7	3.6	48%	58%	0.0%	0.0%	35447.1	37354.2	1569.0	1773.5	4773.2	5149.4
Applied Nutrition	303.00	12.46	13.79	24.3	22.0	17.1	14.7	1%	2%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
B&M European Value Re	279.00	22.22	22.93	10.2	12.2	6.5	7.3	12%	7%	4.2%	3.9%	5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	19.62	1.62	1.85	12.1	10.6	1.4	1.4			4.1%	4.7%	4419.1	4656.0	1887.0	2063.0		
Barratt Redrow	325.80	26.43	23.68	13.0	13.8	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	530.00	26.78	31.87	19.8	16.6	11.0	9.5	6%	8%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Bellway	2266.00	182.89	136.40	12.8	16.6	0.8	0.8	12%	0%	3.6%	3.2%	3162.2	3016.6	320.0	242.2	326.5	245.7
Berkeley Group	3560.00	330.87	266.33	11.7	13.4	1.0	0.9	8%	7%	3.1%	1.8%	2383.3	2053.5	449.8	352.1	446.8	348.1
Breedon Group	328.20	33.08	34.96	9.9	9.4	6.5	6.0	5%	9%	4.8%	4.8%	1789.4	1883.1	148.6	155.8	272.4	284.8
C & C Group	104.20	0.10	0.10	16.6	12.4	8.9	7.6	0%	5%	3.4%	4.8%	1569.8	1534.9	70.5	70.8	104.3	104.6
Cairn Homes	2.76	0.24	0.26	11.7	10.5	8.3	7.7	6%	6%	4.2%	4.5%	1080.5	1207.4	185.0	200.4	187.2	203.1
Coca-Cola HBC	4330.00	2.91	3.18	17.8	16.3	11.9	9.3	3%	3%	2.5%	2.7%	12502.8	16751.0	1494.6	1883.4	1908.0	2437.1
Compass Group	33.57	1.47	1.62	22.8	20.8	12.5	11.6	4%	4%	2.2%	2.4%	50464.4	53759.5	3734.7	4055.5	5109.0	5447.0
Cranswick	5500.00	301.74	322.29	17.0	17.1	8.9	8.4	3%	3%	2.2%	2.1%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	96.26	491.11	577.20	19.6	16.7	11.2	10.1	10%	11%	1.6%	1.7%	39298.3	42730.2	5629.1	6171.9	7850.0	8689.0
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	1876.00	1.65	1.64	13.9	15.2	11.3	11.7	8%	6%	2.2%	2.3%	19643.0	18439.1	5901.0	5788.6	6674.0	6260.4
Dole	14.31	129.66	139.84	11.0	10.2	5.6	5.1	9%	12%	2.3%	2.4%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	689.00	8.17	18.19	84.4	37.9	5.8	5.2	nm	nm	2.2%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Entain	478.10	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	46.60	17.65	FALSE	2.6	FALSE	4.5	FALSE	51%	FALSE	0.0%	FALSE	1929.0	FALSE	267.2	FALSE	397.2	FALSE
FBD Holdings	19.20	1.47	1.57	13.0	12.3	1.5	1.5										
Fever-Tree Drinks	933.50	29.41	40.57	31.7	23.0	18.7	14.3	4%	6%	1.9%	2.0%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	85.49	3.94	5.65	21.7	15.1	10.2	8.7	3%	7%	0.0%	0.0%	17610.7	18997.5	1760.7	2068.6	2490.7	2828.5
Forterra	158.20	10.60	12.33	14.9	12.8	7.9	6.8	10%	10%	3.4%	3.9%	341.5	361.5	33.9	39.1	54.4	59.7
Fuller, Smith & Turner	838.00	47.18	53.64	13.3	15.6	7.3	8.9	7%	6%	3.4%	2.8%	397.8	428.7	40.8	50.4	74.6	80.8
Glanbia	21.94	1.66	1.79	13.3	12.2	9.8	9.1	6%	7%	2.1%	2.4%	4229.5	4452.4	447.9	479.7	566.1	598.7
Glenveagh Properties	2.43	0.21	0.24	11.5	10.2	13.2	12.0	10%	10%	0.0%	0.0%	1082.0	1146.5	147.8	151.6	151.6	155.6
Grafton Group	1036.80	74.47	84.04	13.9	12.3	6.8	6.2	5%	8%	3.7%	3.8%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.82	0.05	FALSE	16.1	FALSE	21.4	FALSE	16%	FALSE	8.4%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	297.80	21.86	25.57	13.6	11.6	9.0	6.8	11%	9%	1.0%	1.7%	3378.1	4142.6	203.1	256.0	348.1	437.5
Greggs	2338.00	130.24	128.16	18.0	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	357.80	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	181.00	12.79	14.44	14.2	12.5	8.6	7.7	8%	8%	2.2%	2.4%	22179.1	23585.4	3476.8	3856.3	4850.8	5280.2
Hostelworld Group	86.20	0.13	0.15	8.2	6.7	5.6	4.7	13%	17%	0.0%	0.0%	103.2	108.4	9.3	11.0	20.5	21.8
Howden Joinery	853.00	52.56	56.26	16.2	15.2	9.6	8.8	5%	6%	2.6%	2.8%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	458.50	0.60	0.68	9.2	8.1	4.3	4.1	12%	9%	1.9%	2.1%	34189.8	37293.8	4098.7	4344.5	6699.7	7079.0
Ibstock	75.10	-6.20	2.16	nm	34.8	10.8	10.0	6%	3%	0.7%	0.0%	334.7	355.3	-0.3	19.0	44.1	47.5
ICG	7.98																
IRES REIT	1.36	0.16	0.15	8.7	9.0	1.0	0.9	2%	2%	4.0%	4.3%	68.2	72.7	105.0	104.9	102.4	102.4
J D Wetherspoon	1015.00	39.83	52.88	17.0	19.2	7.6	8.4	15%	7%	1.8%	1.2%	2238.0	2416.9	120.2	137.1	240.1	257.5
Jet2	1524.00	208.16	160.30	7.0	9.5	1.1	2.1	19%	2%	1.1%	1.3%	7482.1	8060.1	439.6	258.2	732.5	592.9
Kerry Group	99.25	5.18	5.80	19.2	17.1	14.2	12.9	4%	4%	1.6%	1.7%	6908.1	7365.3	956.2	1059.1	1269.6	1377.1
Kingfisher	369.90	23.42	26.27	12.1	14.1	5.3	5.8	10%	8%	4.4%	3.4%	12945.0	13088.1	651.0	711.9	1327.0	1373.3
Kingspan	98.70	4.40	5.73	22.5	17.2	14.8	11.5	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	28.04	1.79	2.21	15.7	12.7	9.4	8.5	6%	8%	2.0%	2.5%	2371.9	2558.5	741.7	838.4	936.9	1046.0
Lufthansa	8.88	1.08	1.01	8.2	8.8	8.3	8.3	20%	14%	3.6%	3.4%	42420.4	45595.1	1804.0	1841.0	3010.1	3085.7
Marston's	59.10	9.74	10.27	6.1	5.8	7.2	7.0	12%	11%	0.0%	0.0%	887.4	900.4	166.2	171.2	211.7	216.6
Mitchells & Butlers	315.50	31.43	33.14	10.0	9.5	6.6	6.2	4%	5%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3
Mondi	784.80	0.23	0.55	41.0	17.1	9.8	7.8	nm	2%	1.9%	2.9%	8221.5	8606.0	306.9	491.0	786.5	984.3
Origin Enterprises	4.03	0.54	0.55	7.7	7.3	5.5	5.2	4%	8%	4.2%	4.5%	2118.2	2203.1	88.9	90.0	121.8	126.4
Permanent TSB	2.96	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	1252.50	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	369.40	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	93.80	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	26.00	2.12	1.61	11.9	16.1	6.5	7.9	6%	3%	1.7%	1.8%	15544.3	15856.5	2459.2	1855.6	3832.6	3415.6
Smurfit Westrock	44.03	1.60	2.80	27.5	15.7	7.7	6.4	5%	11%	4.2%	4.5%	32233.2	34386.8	1859.3	2661.8	4736.9	5523.5
SSP Group	190.20	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	560.00	40.50	34.68	11.2	16.1	7.4	9.0	6%	5%	4.4%	3.5%	2006.0	2039.5	287.0	256.3	415.0	389.5
Taylor Wimpey	78.70	5.25	5.52	15.0	14.2	0.7	0.7	4%	2%	3.0%	3.4%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	634.00	27.83	34.74	22.8	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	4.39	0.27	0.28	16.2	15.7	9.7	7.2	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Vistry Group	246.00	27.44	34.46	9.0	7.1	1.0	1.0	97%	79%	0.0%	4.1%	3999.4	3186.7	193.8	235.2	907.5	739.1
WH Smith	427.20	39.84	36.41	10.7	11.7	5.7	5.5	nm	3%	0.0%	0.0%	1627.2	1634.1	107.9	112.0	162.4	165.9
Whitbread	2815.00																
Wickes Group	242.50	21.03	24.54	11.5	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	1147.00	0.01	-4.23	1426.2	nm	8.0	7.9	47%	22%	0.0%	0.0%	5691.4	6637.7	139.7	-472.3	1318.3	891.8

Closing prices as of: 11/11/2026