

Goodbody Market Commentary Metrics



29 November 2024																			
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA			
		2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025		
ABB Group	5.10	0.65	0.55	7.9	9.3	9.9	9.9						4445.6	4225.8	2133.4	1835.9			
Air France-KLM	7.42	3.76	4.50	2.0	1.6	3.7	2.5	45%	47%	0.0%	0.0%	31439.5	32867.2	1702.2	1945.6	4340.3	4627.8		
ASX European Value Retail	342.50	36.93	38.40	14.6	8.9	10.0	6.4	6%	10%	2.7%	4.5%	5484.0	5726.1	548.0	570.2	630.0	655.9		
Bank of Ireland	8.28	1.48	1.25	5.6	6.6	6.6	6.6			2.2%	6.0%	4322.9	4149.1	1093.0	1206.4				
Balkovier Group	139.50	27.03	29.84	15.7	14.2	11.3	6.1	5.8	10%	7%	5.5%	5.8%	2265.5	2255.6	111.2	118.9	184.5	192.4	
Barratt Redrow	423.50	27.03	29.84	15.7	14.2	11.3	6.1	5.8	10%	7%	5.5%	5.8%	2265.5	2255.6	111.2	118.9	184.5	192.4	
Bellway	2480.00	119.91	160.68	20.8	15.4	9.9	6.8	0.9	0.8	0.0%	2.0%	2.4%	2380.2	2700.1	238.5	287.6	243.2	293.7	
Berkley Group	4210.00	362.23	385.85	11.6	14.7	1.3	1.3	1.3	5%	7%	6.2%	6.2%	2579.9	2383.5	585.6	467.1	526.8	443.8	
Brearton Group	465.00	31.92	35.17	14.6	13.2	7.4	6.6	4%	7%	3.0%	3.2%	1603.6	1708.4	163.4	180.1	265.0	288.2		
Brydes	1388.00	67.66	74.62	19.0	17.3	12.0	11.1	4%	5%	2.7%	3.0%	1005.1	2024.4	240.8	261.7	314.4	338.6		
Brydes Technology	451.60	0.00	0.00	nm	nm	nm	16.7	14.7	4%	5%	5.7%	5.0%	208.7	237.6	55.7	61.3	58.1	63.8	
C.B.C Group	148.60	0.08	0.12	20.5	14.9	9.7	8.4	7%	9%	3.5%	3.4%	1652.5	1678.0	60.0	80.3	93.7	114.3		
Cairn Homes	165.10	0.18	0.20	11.6	10.2	8.6	8.0	11%	9%	3.8%	4.1%	856.6	940.8	144.9	156.0	147.2	158.8		
Carex Power	165.10	-0.58	-0.62	nm	nm	nm	nm	nm	nm	0.0%	0.0%	64.9	68.8	-21.3	-24.4	-7.6	-11.5		
Coca-Cola HBC	2822.00	2.18	2.42	15.6	14.0	9.2	8.4	4%	5%	2.0%	2.2%	10554.5	11255.6	1154.4	1270.5	1575.0	1716.8		
Compass Group	2891.00	1.19	1.31	28.7	26.1	16.4	15.3	3%	3%	1.8%	1.9%	4171.1	44610.0	296.5	323.3	397.8	4286.3		
Convatec Group	236.60	0.16	0.17	19.3	17.5	11.3	10.1	3%	3%	2.4%	2.2%	2235.2	2361.4	478.4	517.1	614.2	652.9		
Covestro	4960.00	242.82	265.78	14.6	16.7	7.6	8.9	7%	5%	2.3%	1.8%	2599.2	2758.4	167.3	195.8	265.8	283.3		
CWH	101.94	554.69	606.45	18.4	16.8	11.7	10.2	6%	9%	1.4%	1.4%	35444.8	37684.8	5271.6	5855.4	6922.4	7611.4		
Dalata Hotel Group	4.42	0.38	0.38	13.3	11.5	8.8	7.8	3%	3%	2.0%	3.2%	650.7	684.2	157.0	176.5	226.8	252.6		
Darkease	576.80	0.78	0.95	9.4	7.7	41.2	33.3	1%	2%	0.0%	0.0%	677.8	799.6	64.4	89.0	107.2	130.2		
Datase	-0.75	-0.06	-0.01	nm	nm	nm	22.2	22.2	nm	nm	0.0%	0.0%	27.5	30.2	-6.1	-2.3	-3.5	0.2	
DCC	5750.00	454.49	481.01	13.0	12.0	nm	nm	nm	nm	3.9%	3.6%	18858.8	20536.6	568.7	601.7	923.0	963.0		
Devolver Digital	24.50	-0.76	2.44	nm	nm	12.7	25.4	3%	5%	12%	0.0%	100.9	109.6	-3.7	15.0	1.2	16.4		
Diageo	2368.00	1.79	1.72	20.8	17.4	15.8	13.6	3%	5%	2.8%	3.6%	20269.0	20520.8	6359.0	6185.2	6438.0	6506.0		
Dole	15.02	126.50	140.77	11.9	10.7	5.5	5.1	7%	10%	2.1%	2.4%	8307.8	8746.9	270.2	292.8	275.2	292.8		
DS Smith	583.00	33.07	34.45	17.6	16.9	10.1	10.1	nm	2%	3.1%	3.3%	7426.9	7445.9	592.5	604.5	1025.5	1037.5		
easyJet	552.40	63.95	67.69	8.6	8.2	3.0	2.7	5%	13%	2.2%	2.4%	9260.2	9736.4	495.2	4405.6	1405.6	1549.7		
Endas	802.40	26.76	53.01	30.0	15.1	8.6	8.1	3%	6%	1.0%	2.0%	5136.8	5325.7	593.0	770.2	1072.9	1131.2		
Eusek	56.45	7.64	17.12	7.4	3.3	6.0	4.9	1%	47%	0.0%	0.0%	1783.6	1883.0	210.7	255.5	331.3	380.7		
FBD Holdings	12.25	1.64	1.66	7.5	7.4	1.0	1.0			9.8%	10.2%	412.5	422.9	52.9	56.6				
Farquhar	16820.00																		
Fever-Tree Drinks	700.00	26.69	34.07	26.2	20.5	14.1	11.0	6%	5%	2.5%	2.6%	372.3	391.7	39.1	58.4	51.6	63.8		
FD Technologies	2030.00	-28.22	-9.92	nm	nm	19.3	26.2	5%	nm	0.0%	0.0%	277.8	252.0	2.6	8.3	23.0	22.7		
Flutter Entertainment	272.80	6.62	9.10	41.2	30.0	20.8	16.1	2%	3%	0.0%	0.0%	14238.5	15944.4	2061.7	2659.2	2571.7	3219.2		
Forterra	179.20	10.49	12.86	17.1	13.9	8.7	7.4	2%	8%	2.5%	3.7%	338.8	363.7	34.7	41.0	55.0	62.3		
Frontier Developments	225.00	-2735.44	587.49	nm	9.4	34.4	3.6	8%	8%	0.0%	0.0%	89.3	90.7	-31.9	-8.2	3.2	27.2		
Games Workshop Group	13870.00	458.78	515.72	30.2	26.9	18.5	17.4	3%	3%	3.0%	3.2%	525.7	215.2	201.8	215.2	240.8	252.4		
Glanbia	15.41	1.40	1.42	11.0	10.8	8.5	8.2	8%	8%	2.7%	3.0%	3928.3	4218.5	395.3	393.5	542.0	542.4		
Glenwest Properties	1.53	0.17	0.19	9.0	8.0	10.0	8.6	nm	16%	0.0%	0.0%	955.7	1017.5	136.6	136.6	146.1	146.1		
Grafton Group	942.80	64.83	72.28	14.5	13.0	8.8	8.1	7%	4%	4.0%	4.2%	2270.2	2478.7	147.0	164.9	279.0	301.9		
Greencast Renewables	0.86	0.14	0.14	6.1	6.0	13.2	14.4	7%	16%	7.8%	8.2%	216.9	189.2	189.4	189.2	189.4	189.4		
Greencore	196.40	12.47	14.10	15.8	13.9	7.4	7.0	6%	5%	0.9%	1.4%	1810.4	1888.7	92.4	97.8	151.4	158.1		
Greggs	2700.00	137.95	153.18	19.6	17.6	8.9	8.0	nm	2%	2.6%	2.8%	2048.4	2268.2	195.7	220.8	340.9	382.7		
Hammerston	288.60																		
Haidilao Materials	119.15	9.74	10.42	12.2	11.4	7.3	6.7	7%	8%	2.1%	2.1%	22693.8	23477.2	2683.4	2852.1	3625.8	3780.2		
Hostelworld Group	131.00	0.14	0.17	11.6	9.2	9.0	6.8	9%	11%	0.0%	0.0%	94.6	104.7	7.3	10.8	21.4	25.5		
Howden Joinery	821.00	46.11	47.32	17.8	17.3	10.2	9.8	2%	6%	2.9%	2.9%	2329.9	2403.7	338.8	352.7	490.0	506.8		
IAG	260.60	0.44	0.47	7.2	6.7	3.3	3.0	nm	nm	0.5%	2.6%	31596.1	32808.0	3540.8	3758.4	5794.3	6204.4		
Ibstock	187.20	8.63	11.00	21.7	17.0	11.0	9.3	1%	5%	2.4%	2.9%	395.1	424.5	54.0	64.9	83.4	95.7		
ICG	5.56	0.34	0.38	16.2	14.6	8.1	7.2	10%	12%	2.8%	2.9%	614.1	641.4	67.8	74.0	136.8	143.0		
IBES BFT	0.90	0.07	0.14	12.3	6.6	61.9	0.6	3%	5%	5.8%	6.2%	65.1	65.2	56.9	87.3	57.6	85.1		
ITM Power	34.52	-7.93	-7.44	nm	nm	nm	nm	nm	nm	0.0%	0.0%	18.2	51.7	-54.5	-51.8	-49.4	-39.3		
J.D. Wetherspoon	635.00	46.80	53.40	15.8	11.9	8.1	7.4	5%	10%	1.6%	1.9%	2035.5	2107.7	139.5	152.8	241.7	255.0		
Jet2	1593.00	164.89	168.15	7.4	9.5	1.6	1.8	27%	17%	1.0%	1.0%	6255.3	7219.2	428.2	438.8	677.0	718.2		
Johnson Matthew	1330.00	156.57	170.95	8.5	7.8	6.1	5.4	14%	5%	5.8%	6.1%	4045.0	4033.1	429.5	467.6	558.9	611.7		
Kainos Group	778.00	39.04	30.50	29.9	25.5	19.7	15.3	5%	5%	2.1%	3.1%	382.4	365.1	60.8	47.2	69.0	54.1		
Kerry Group	89.55	4.63	5.17	19.3	17.3	14.0	12.6	4%	4%	1.4%	1.6%	7906.6	8189.1	933.3	1027.5	1240.1	1344.3		
Keywords Studios	2446.00	1.23	1.31	23.9	22.5	16.8	15.4	4%	4%	0.1%	0.1%	903.0	966.2	98.1	110.6	139.0	146.2		
KraftFisher	249.30	21.60	20.84	11.1	12.0	5.2	5.7	11%	10%	5.2%	5.0%	12980.0	12850.4	673.0	626.0	1315.0	1324.4		
Kinross	71.60	3.60	3.95	19.9	17.9	13.3	11.7	4%	4%	0.8%	0.8%	8491.6	9370.5	830.0	926.6	1109.5	1226.6		
LungLife AI	0.12	-0.16	-0.14	nm	nm	nm	nm	nm	nm	0.0%	0.0%	4.4	8.6	-4.0	-3.5	-3.8	-3.2		
Lufthansa	6.31	1.18	1.53	5.4	4.1	2.8	2.3	21%	32%	4.8%	4.8%	38578.4	40901.3	2183.0	2780.3	4575.1	5208.1		
Manston's	39.00	5.97	8.02	6.5	4.9	7.7	7.5	14%	17%	0.0%	0.0%	893.9	159.8	159.8	159.8	202.9	202.9		
Mitchells & Butlers	249.00	25.36	27.75	9.8	9.0	6.8	6.3	9%	8%	0.0%	0.0%	2625.2	2753.6	305.3	319.9	442.5	461.2		
Mullen Ventures	321.00	-21.44	48.11																