Goodbody Market Commentary Metrics

Goodbody

16 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	11.63	0.89	0.98	13.1	11.8	1.7	1.7			4.6%	5.1%	4676.2	4864.6	2314.4	2455.8		
Air France-KLM	14.35	4.16	4.92	3.5	2.9	3.7	3.6	49%	59%	0.0%	0.0%	35447.1	37354.2	1569.0	1773.5	4773.2	5149.4
Applied Nutrition	315.50	12.46	13.79	25.3	22.9	17.8	15.4	1%	2%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
B&M European Value Re	351.00	22.22	22.93	10.2	15.3	6.5	8.8	12%	6%	4.2%	3.1%	5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	19.39	1.62	1.85	11.9	10.5	1.4	1.3			4.1%	4.7%	4419.1	4656.0	1887.0	2063.0		
Barratt Redrow	327.80	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	2298.00	182.89	136.40	12.8	16.8	0.8	0.8	12%	0%	3.6%	3.2%	3162.2	3016.6	320.0	242.2	326.5	245.7
Berkeley Group	3584.00	330.87	266.33	11.7	13.5	1.0	0.9	8%	7%	3.1%	1.8%	2383.3	2053.5	449.8	352.1	446.8	348.1
Breedon Group	326.40	33.08	34.96	9.9	9.3	6.5	6.0	5%	9%	4.8%	4.9%	1789.4	1883.1	148.6	155.8	272.4	284.8
C & C Group	104.80	0.10	0.10	16.6	12.5	8.9	7.6	0%	5%	3.4%	4.8%	1569.8	1534.9	70.5	70.8	104.3	104.6
Cairn Homes	2.77	0.24	0.26	11.7	10.5	8.4	7.8	6%	6%	4.2%	4.5%	1080.5	1207.4	185.0	200.4	187.2	203.1
Coca-Cola HBC	4238.00	2.91	3.18	17.5	16.0	11.8	9.2	3%	3%	2.6%	2.8%	12502.8	16751.0	1494.6	1883.4	1908.0	2437.1
Compass Group	33.72	1.47	1.62	22.9	20.9	12.5	11.7	4%	4%	2.2%	2.4%	50464.4	53759.5	3734.7	4055.5	5109.0	5447.0
Cranswick	5620.00	301.74	322.29	17.0	17.4	8.9	8.6	3%	3%	2.2%	2.1%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	93.16	491.11	577.20	19.0	16.1	10.9	9.9	10%	11%	1.7%	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	1921.50	1.65	1.64	13.9	15.5	11.3	11.9	8%	5%	2.2%	2.3%	19643.0	18439.1	5901.0	5788.6	6674.0	6260.4
Dole	14.32	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	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	475.40	56.06	63.78	8.5	7.5	7.1	6.6	9%	13%	4.3%	4.6%	5121.6	5318.1	666.9	735.3	956.9	1010.6
Evoke	45.85	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	19.30	1.47	1.57	13.1	12.3	1.5	1.5										
Fever-Tree Drinks	984.50	29.41	40.57	33.5	24.3	19.8	15.1	3%	6%	1.8%	1.9%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	81.13	3.94	5.65	20.6	14.3	9.9	8.4	3%	7%	0.0%	0.0%	17610.7	18997.5	1760.7	2068.6	2490.7	2828.5
Forterra	153.80	9.07	10.77	17.0	14.3	8.8	7.7	3%	9%	2.9%	3.5%	340.4	360.3	29.6	34.7	50.0	55.2
Fuller, Smith & Turner	870.00	47.18	53.64	13.3	16.2	7.3	9.1	7%	5%	3.4%	2.7%	397.8	428.7	40.8	50.4	74.6	80.8
Glanbia	22.08	1.66	1.79	13.3	12.3	9.9	9.1	6%	7%	2.1%	2.3%	4229.5	4452.4	447.9	479.7	566.1	598.7
Glenveagh Properties	2.39	0.21	0.24	11.3	10.1	13.0	11.9	10%	10%	0.0%	0.0%	1082.0	1146.5	147.8	151.6	151.6	155.6
Grafton Group	1031.80	74.47	84.04	13.9	12.3	6.7	6.2	5%	8%	3.7%	3.8%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.81	0.05	FALSE	15.9	FALSE	21.3	FALSE	16%	FALSE	8.4%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	300.80	21.86	25.57	13.8	11.8	9.0	6.9	11%	9%	1.0%	1.7%	3378.1	4142.6	203.1	256.0	348.1	437.5
Greggs	2380.00	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	360.00	23.21	25.54	15.5	14.1	1.0	0.9	3%	4%	4.9%	5.2%	227.4	247.5	190.0	203.2	188.6	203.1
Heidelberg Materials	177.15	12.79	14.44	13.8	12.3	8.4	7.6	8%	8%	2.2%	2.5%	22179.1	23585.4	3476.8	3856.3	4850.8	5280.2
Hostelworld Group	88.00	0.13	0.15	8.3	6.9	5.8	4.9	13%	16%	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	452.90	0.60	0.68	9.1	8.0	4.3	4.1	12%	9%	1.9%	2.1%	34189.8	37293.8	4098.7	4344.5	6699.7	7079.0
Ibstock	73.50	-6.20	2.16	nm	34.1	10.6	9.8	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	1030.00	39.83	52.88	17.0	19.5	7.6	8.4	15%	7%	1.8%	1.2%	2238.0	2416.9	120.2	137.1	240.1	257.5
Jet2	1510.00	208.16	160.30	7.0	9.4	1.1	2.0	19%	2%	1.1%	1.3%	7482.1	8060.1	439.6	258.2	732.5	592.9
Kerry Group	101.70	5.18	5.80	19.6	17.5	14.5	13.2	4%	4%	1.5%	1.7%	6908.1	7365.3	956.2	1059.1	1269.6	1377.1
Kingfisher	377.00	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	96.10	4.40	5.73	21.9	16.8	14.5	11.2	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	27.82	1.79	2.21	15.6	12.6	9.3	8.4	6%	8%	2.0%	2.5%	2371.9	2558.5	741.7	838.4	936.9	1046.0
Lufthansa	8.85	1.08	1.01	8.2	8.8	8.3	8.3	20%	15%	3.7%	3.4%	42420.4	45595.1	1804.0	1841.0	3010.1	3085.7
Marston's	58.00	9.74	10.27	6.0	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	317.50	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	791.20	0.23	0.55	41.4	17.3	9.9	7.8	nm	2%	1.9%	2.9%	8221.5	8606.0	306.9	491.0	786.5	984.3
Origin Enterprises	4.09	0.54	0.55	7.7	7.4	5.5	5.3	4%	8%	4.2%	4.4%	2118.2	2203.1	88.9	90.0	121.8	126.4
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	1284.50	99.27	99.14	12.9	13.0	1.1	1.1	nm	5%	3.1%	3.3%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	369.80	0.43	0.31	10.3	14.5	1.0	0.9	8%	6%	0.0%	0.0%	843.7	856.2	199.3	152.1	301.0	258.8
Rank Group	90.40	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	25.70	2.12	1.61	11.9	15.9	6.5	7.8	6%	3%	1.7%	1.8%	15544.3	15856.5	2459.2	1855.6	3832.6	3415.6
Smurfit Westrock	42.35	1.60	2.80	26.5	15.1	7.6	6.3	5%	11%	4.3%	4.6%	32233.2	34386.8	1859.3	2661.8	4736.9	5523.5
SSP Group	184.30	13.95	16.06	13.2	11.5	6.6	6.5	3%	5%	2.7%	3.1%	3816.7	3930.1	288.6	317.2	625.1	652.2
Tate & Lyle	561.00	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	78.70	4.84	5.10	16.3	15.4	0.7	0.7	5%	2%	3.0%	3.4%	3743.9	3960.6	267.3	274.7	273.6	282.3
Travis Perkins	640.50	27.83	34.74	23.0	18.4	7.2	6.6	6%	3%	1.9%	2.2%	4507.3	4632.9	115.9	136.8	267.2	293.6
Uniphar	4.29	0.27	0.28	15.8	15.3	9.5	7.0	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Vistry Group	237.80	27.44	34.46	8.7	6.9	0.9	1.0	101%	81%	0.0%	4.2%	3999.4	3186.7	193.8	235.2	907.5	739.1
WH Smith	374.00	39.84	36.41	9.4	10.3	5.3	5.1	nm	3%	0.0%	0.0%	1627.2	1634.1	107.9	112.0	162.4	165.9
Whitbread	2806.00																
Wickes Group	241.00	21.03	24.54	11.5	9.8	5.6	5.0	3%	8%	4.6%	5.0%	1684.9	1766.1	81.1	90.0	203.4	219.4
Wizz Air	1141.00	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: 15/11/2026