Goodbody Market Commentary Metrics

Goodbody

17 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	11.66	0.89	0.98	13.2	11.9	1.7	1.7			4.6%	5.1%	4676.2	4864.6	2314.4	2455.8		
Air France-KLM	14.58	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	305.00	12.46	13.79	24.5	22.1	17.2	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	357.40	22.22	22.93	10.2	15.6	6.5	9.0	12%	5%	4.2%	3.1%	5775.0	5999.3	359.0	371.6	458.0	470.3
Bank of Ireland	19.44	1.62	1.85	12.0	10.5	1.4	1.3			4.1%	4.7%	4419.1	4656.0	1887.0	2063.0		
Barclays	427.90	53.36	63.08	8.0	6.8	0.7	0.7			8.0%	10.2%	31357.3	32923.4	10457.4	11942.4		
Barratt Redrow	321.00	26.43	23.68	13.0	13.6	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	532.00	26.78	31.87	19.9	16.7	11.0	9.6	5%	7%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Bellway	2240.00	182.89	136.40	12.8	16.4	0.8	0.7	12%	0%	3.6%	3.3%	3162.2	3016.6	320.0	242.2	326.5	245.7
Berkeley Group	3582.00	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	325.40	33.08	34.96	9.8	9.3	6.4	6.0	5%	9%	4.8%	4.9%	1789.4	1883.1	148.6	155.8	272.4	284.8
C & C Group	107.00	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	2.74	0.24	0.26	11.6	10.4	8.3	7.7	6%	6%	4.2%	4.6%	1080.5	1207.4	185.0	200.4	187.2	203.1
Coca-Cola HBC	4350.00	2.91	3.18	17.9	16.4	12.0	9.4	3%	3%	2.5%	2.7%	12502.8	16751.0	1494.6	1883.4	1908.0	2437.1
Compass Group	33.64	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	5630.00	301.74	322.29	17.0	17.5	8.9	8.6	3%	3%	2.2%	2.1%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	92.37	491.11	577.20	18.8	16.0	10.9	9.8	10%	11%	1.7%	1.8%	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	1940.50	1.65	1.64	13.9	15.6	11.3	12.0	8%	5%	2.2%	2.3%	19643.0	18439.1	5901.0	5788.6	6674.0	6260.4
Dole	14.12	129.66	139.84	10.9	10.1	5.6	5.1	9%	12%	2.3%	2.5%	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	467.30	56.06	63.78	8.3	7.3	7.0	6.6	9%	13%	4.4%	4.6%	5121.6	5318.1	666.9	735.3	956.9	1010.6
Evoke	46.00	17.65	FALSE	2.6	FALSE	4.5	FALSE	52%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	19.20	1.47	1.57	13.0	12.3	1.5	1.5										
Fever-Tree Drinks	970.00	29.41	40.57	33.0	23.9	19.4	14.9	3%	6%	1.9%	2.0%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	79.15	3.94	5.65	20.1	14.0	9.8	8.3	4%	7%	0.0%	0.0%	17610.7	18997.5	1760.7	2068.6	2490.7	2828.5
Forterra	153.00	9.07	10.77	16.9	14.2	8.8	7.6	3%	9%	3.0%	3.5%	340.4	360.3	29.6	34.7	50.0	55.2
Fuller, Smith & Turner	886.00	47.18	56.21	13.3	15.8	7.3	9.1	7%	5%	3.4%	2.8%	397.8	428.3	40.8	52.9	74.6	85.0
Glanbia	22.23	1.66	1.79	13.4	12.4	9.9	9.2	6%	7%	2.1%	2.3%	4229.5	4452.4	447.9	479.7	566.1	598.7
Glenveagh Properties	2.35	0.21	0.24	11.1	9.9	12.8	11.7	10%	10%	0.0%	0.0%	1082.0	1146.5	147.8	151.6	151.6	155.6
Grafton Group	1033.40	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	15.8	FALSE	21.2	FALSE	17%	FALSE	8.5%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	300.00	21.86	25.57	13.7	11.7	9.0	6.8	11%	9%	1.0%	1.7%	3378.1	4142.6	203.1	256.0	348.1	437.5
Greggs	2404.00	130.24	128.16	18.5	18.8	7.5	7.1	4%	5%	2.9%	2.9%	2303.8	2441.5	202.8	199.9	382.2	401.3
Hammerson	362.60	23.21	25.54	15.6	14.2	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	89.80	0.13	0.15	8.5	7.0	5.9	5.0	13%	16%	0.0%	0.0%	103.2	108.4	9.3	11.0	20.5	21.8
Howden Joinery	852.00	52.56	56.26	16.2	15.1	9.6	8.8	5%	6%	2.7%	2.8%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	453.50	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	69.30	-6.20	2.16	nm	32.1	10.2	9.5	6%	3%	0.7%	0.0%	334.7	355.3	-0.3	19.0	44.1	47.5
ICG	7.96																
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	1023.00	39.83	52.88	17.0	19.3	7.6	8.4	15%	7%	1.8%	1.2%	2238.0	2416.9	120.2	137.1	240.1	257.5
Jet2	1525.00	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	101.80	5.18	5.80	19.7	17.6	14.5	13.2	4%	4%	1.5%	1.7%	6908.1	7365.3	956.2	1059.1	1269.6	1377.1
Kingfisher	377.40	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	97.70	4.40	5.73	22.2	17.1	14.7	11.4	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	27.26	1.79	2.21	15.2	12.4	9.2	8.3	6%	8%	2.0%	2.5%	2371.9	2558.5	741.7	838.4	936.9	1046.0
Lufthansa	8.92	1.08	1.01	8.3	8.9	8.3	8.3	20%	14%	3.6%	3.4%	42420.4	45595.1	1804.0	1841.0	3010.1	3085.7
Lloyds Banking Group	98.14	10.11	12.03	9.7	8.2	1.1	1.1			4.7%	5.1%	20089.7	21723.2	8793.4	9967.1		
Marston's	59.00	9.74	10.27	6.1	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	318.00	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	787.20	0.23	0.55	41.1	17.2	9.8	7.8	nm	2%	1.9%	2.9%	8221.5	8606.0	306.9	491.0	786.5	984.3
NatWest Group	595.40	75.88	82.51	7.8	7.2	0.8	0.8			6.4%	6.4%	18210.7	19436.5	8574.9	9230.8		
Origin Enterprises	4.20	0.54	0.55	7.7	7.6	5.5	5.4	4%	7%	4.2%	4.3%	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	1262.00	99.27	99.14	12.7	12.7	1.1	1.0	nm	5%	3.2%	3.3%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	360.60	0.43	0.31	10.0	14.2	0.9	0.9	9%	6%	0.0%	0.0%	843.7	856.2	199.3	152.1	301.0	258.8
Rank Group	89.60	11.15	8.97	10.1	10.0	4.9	4.4	2%	4%	3.1%	3.2%	834.4	881.7	78.0	69.3	137.7	131.7
Ryanair	25.64	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	41.91	1.60	2.80	26.2	15.0	7.5	6.2	5%	11%	4.4%	4.7%	32233.2	34386.8	1859.3	2661.8	4736.9	5523.5
SSP Group	178.00	13.95	16.06	12.8	11.1	6.6	6.4	3%	5%	2.8%	3.2%	3816.7	3930.1	288.6	317.2	625.1	652.2
Tate & Lyle	561.50	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	76.88	4.84	5.10	15.9	15.1	0.7	0.7	5%	2%	3.1%	3.5%	3743.9	3960.6	267.3	274.7	273.6	282.3
Travis Perkins	643.50	27.83	34.74	23.1	18.5	7.3	6.6	6%	3%	1.9%	2.2%	4507.3	4632.9	115.9	136.8	267.2	293.6
Uniphar	4.37	0.27	0.28	16.1	15.6	9.7	7.1	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Vistry Group	232.20	27.44	34.46	8.5	6.7	0.9	0.9	103%	83%	0.0%	4.3%	3999.4	3186.7	193.8	235.2	907.5	739.1
WH Smith	371.00	30.30	26.40	19.0	14.1	4.7	5.7	0%	2%	0.0%	0.0%	1625.0	1588.4	106.0	103.7	238.0	156.1
Whitbread	2812.00																
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	1148.00	0.01	-4.23	1426.2	nm	8.0	8.0	47%	22%	0.0%	0.0%	5691.4	6637.7	139.7	-472.3	1318.3	891.8

Closing prices as of: 16/11/2026