

Goodbody Market Commentary Metrics



April 2025																	
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
	1c	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
AIB Group	5.73	0.75	0.78	7.6	7.4	0.8	0.8			6.7%	7.3%	4433.5	4399.4	2114.3	2022.1		
Air France-KLM	7.59	4.85	5.80	1.6	1.3	3.3	2.9	83%	130%	0.0%	0.0%	33240.2	34581.3	1903.6	2176.4	4701.4	5070.7
Applied Nutrition	110.00	8.57	9.66	12.8	11.4	9.0	7.4	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6
B&M European Val	314.10	35.35	36.60	8.9	8.6	6.7	6.6	8%	10%	5.1%	5.2%	5508.6	5874.6	536.1	557.8	618.4	644.5
Bank of Ireland	10.36	1.24	1.46	8.3	7.1	0.8	0.7			6.2%	6.7%	4023.1	4117.0	1670.9	1740.2		
Bakkavor Group	176.60																
Barratt Redrow	438.60	30.44	34.82	14.4	12.6	0.7	0.8	6%	12%	3.6%	3.9%	5559.7	6075.9	601.6	720.8	614.4	726.6
Bellway	2462.00	160.68	191.29	15.3	12.9	0.8	0.8	4%	6%	2.6%	3.2%	2700.1	2972.6	287.6	335.4	293.7	335.5
Berkeley Group	3898.00	285.85	292.86	13.6	13.3	1.2	1.2	8%	6%	6.7%	6.7%	2383.5	2452.6	467.1	478.8	443.8	455.8
Breedon Group	449.00	36.60	42.29	12.3	10.6	6.3	5.3	5%	11%	3.4%	3.6%	1862.4	1997.3	185.8	211.4	309.6	343.0
Bytes Technology	493.40	19.85	22.25	24.9	22.2	15.7	13.5	5%	6%	4.8%	5.4%	228.1	251.2	63.8	71.5	66.2	74.1
C & C Group	125.80	0.11	0.12	13.0	12.1	7.6	7.6	5%	6%	4.2%	4.5%	1666.3	1707.4	76.9	79.4	110.9	113.4
Cairn Homes	1.89	0.20	0.22	9.4	8.7	6.9	6.8	6%	14%	4.5%	5.3%	941.1	1003.3	158.2	164.3	161.0	167.6
Ceres Power	58.25	-8.62	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE
Coca-Cola HBC	3740.00	2.56	2.78	17.0	15.7	10.3	9.6	4%	4%	2.7%	3.0%	11654.6	12355.2	1321.6	1427.8	1739.7	1858.6
Compass Group	2538.00	1.27	1.39	26.4	24.2	15.3	14.4	3%	3%	1.9%	2.1%	44276.1	46981.4	3212.6	3446.7	4253.3	4511.0
Cranswick	5080.00	266.23	281.61	19.1	18.0	9.3	8.7	5%	4%	1.7%	1.8%	2721.5	2849.8	195.8	206.6	282.2	293.1
CRH	85.02	571.88	639.76	14.9	13.3	9.1	8.5	11%	12%	1.7%	1.8%	37929.8	39857.8	5726.1	6204.3	7613.0	8205.2
Dalata Hotel Group	5.15	0.37	0.36	14.1	14.4	8.7	8.6	7%	7%	2.7%	2.9%	664.9	671.1	167.5	164.9	241.8	239.8
Datalux	0.35	-0.01	0.00	nm	445.1	242.5	26.4	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7
DCC	4930.00	477.33	500.52	10.3	9.8	5.8	5.2	10%	11%	4.2%	4.4%	20507.9	20842.5	597.1	640.3	958.4	1006.1
Devolver Digital	20.25	1.30	1.72	20.6	15.6	4.2	3.4	10%	11%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	2078.00	1.64	1.69	16.8	16.3	13.4	13.1	5%	5%	3.8%	3.8%	20079.9	20459.9	5925.2	6083.1	6358.9	6485.9
Dole	13.76	133.38	144.45	10.3	9.5	5.1	4.8	7%	10%	2.4%	2.7%	8465.5	8637.2	273.5	286.2	380.1	392.8
easyJet	475.00	75.89	81.77	6.3	5.8	1.9	1.8	20%	13%	3.0%	3.3%	10339.5	10922.0	800.9	861.5	1635.0	1762.6
Entrain	556.20	45.45	66.86	12.2	8.3	7.0	6.4	8%	10%	3.5%	3.7%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	47.90	11.35	12.65	4.2	2.7	5.3	4.5	35%	50%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	12.70	1.66	FALSE	7.7	FALSE	1.1	FALSE			9.8%	FALSE	422.9	FALSE	56.6	FALSE		
Ferguson	12450.00																
Fever-Tree Drinks	782.00	24.15	29.72	32.4	26.3	17.8	15.5	4%	4%	2.3%	2.4%	374.5	412.0	30.9	37.0	44.9	52.0
FD Technologies	1774.00	-57.35	42.11	nm	42.1	24.3	13.8	nm	nm	0.0%	0.0%	164.1	96.8	-4.3	11.0	17.9	29.6
Flutter Entertainment	228.26	9.08	13.07	25.2	17.5	14.3	11.0	4%	6%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5
Forterra	177.20	12.86	17.33	13.8	10.2	7.3	5.9	8%	8%	3.7%	3.9%	363.7	392.5	41.0	52.6	62.3	74.7
Frontier Developm	190.80	587.49	849.11	0.3	0.2	1.9	2.7	7%	nm	0.0%	0.0%	90.1	96.7	5.2	-5.4	37.9	28.4
Fuller, Smith & Tu	548.00	30.21	34.76	18.1	15.8	8.1	7.6	1%	4%	3.6%	3.8%	374.6	396.6	49.3	41.0	65.8	69.8
Games Workshop	14470.00	542.36	571.01	26.7	25.3	16.7	15.7	4%	4%	3.2%	3.4%	601.2	641.3	236.7	248.7	277.8	294.1
Glanbia	11.38	1.27	1.42	9.0	8.0	7.1	6.2	10%	12%	4.0%	4.3%	3836.5	3938.2	343.8	381.9	491.1	530.6
Glenveagh Proper	1.52	0.19	0.21	7.9	7.2	9.0	7.6	9%	19%	0.0%	0.0%	1005.2	1072.3	141.8	148.0	145.0	151.4
Grafton Group	907.60	69.87	77.31	13.0	11.7	6.3	5.7	5%	7%	4.2%	4.4%	2501.5	2592.6	159.3	176.0	309.3	330.0
Greencoast Renewa	0.75	0.14	0.14	5.2	5.2	13.7	15.0	19%	19%	9.5%	10.0%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	176.40																
Greggs	1815.00	139.34	146.38	13.0	12.4	6.2	5.7	nm	4%	3.8%	4.0%	2189.2	2375.6	204.4	218.0	368.7	403.3
Hammons	252.40																
Heidelberg Matera	165.10	10.42	FALSE	15.9	FALSE	8.8	FALSE	5%	FALSE	1.5%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	115.00	0.17	0.20	7.8	6.6	5.6	4.1	13%	14%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1
Howden Joinery	719.50	46.31	51.01	15.5	14.1	8.6	8.2	6%	6%	3.3%	3.8%	2346.0	2433.2	341.3	367.9	499.6	529.3
IAG	250.50	0.56	0.66	5.2	4.4	2.5	2.2	17%	24%	4.1%	5.1%	33108.3	34316.8	4350.3	4641.9	6969.7	7495.9
Ibstock	179.20	11.00	13.41	16.3	13.4	9.0	7.7	7%	6%	3.1%	3.3%	424.5	456.0	64.9	77.6	95.7	109.6
ICG	5.08	0.38	0.41	13.4	12.3	6.7	6.0	13%	6%	3.2%	3.4%	641.4	661.0	74.0	79.5	143.0	148.5
IBES REIT	1.01	0.14	FALSE	7.4	FALSE	65.7	0.0	4%	FALSE	5.5%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE
ITM Power	28.00	-5.68	-5.22	nm	nm	nm	nm	nm	nm	0.0%	0.0%	22.0	53.6	-43.9	-40.0	-36.1	-30.2
J.D. Wetherspoon	623.50	50.30	56.36	12.4	11.1	7.6	7.3	3%	5%	1.9%	1.9%	2117.8	2229.4	141.4	150.1	249.6	258.8
Jet2	1313.00	181.26	183.73	7.2	7.1	0.8	0.5	23%	15%	0.3%	1.4%	7366.6	8055.8	469.5	494.7	749.2	825.5
Johnson Matthey	1200.00	170.95	183.63	7.0	6.5	5.0	4.6	6%	15%	6.7%	7.1%	4033.1	3967.9	467.6	501.7	611.7	656.1
Kainos Group	702.00	30.50	36.18	23.0	19.4	13.6	11.3	6%	7%	3.5%	3.5%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	93.50	5.10	5.62	18.3	16.6	13.9	12.6	4%	5%	1.5%	1.6%	7229.2	7518.5	980.3	1074.1	1283.1	1379.2
Kingfisher	265.60	20.31	21.55	13.1	12.3	6.0	5.6	9%	8%	4.7%	4.7%	12801.3	13298.6	622.2	661.3	1319.3	1389.5
Kingspan	73.20	4.00	4.45	18.3	16.4	11.9	10.6	5%	5%	0.8%	0.8%	9383.0	9901.4	929.8	1023.9	1234.8	1340.9
Lufthansa	6.21	1.10	1.28	5.7	4.8	6.5	5.9	23%	23%	4.8%	4.8%	39742.1	41591.8	1916.4	2187.3	3205.4	3528.9
Marston's	37.40	7.74	8.85	4.8	4.2	7.2	6.7	16%	18%	0.0%	0.0%	927.3	957.2	157.7	166.2	202.3	211.1
Mitchells & Butlers	242.50	28.18	30.39	8.6	8.0	6.1	5.7	8%	6%	0.0%	0.0%	2711.6	2815.9	322.1	334.7	456.3	473.1
Molten Ventures	253.80	48.11	47.64	5.3	5.3	4.8	5.0	14%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	1112.50	1.04	1.36	12.4	9.5	7.3	6.1	4%	11%	5.0%	5.2%	7802.2	8299.0	744.0	928.7	1212.2	1418.3
NCC Group	135.80	5.53	7.0.														