

Goodbody Market Commentary Metrics



September 2026																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
Air Group	11.71	0.88	0.96	13.2	12.2	1.7	1.7	3.4	64%	73%	4.6%	5.0%	4660.1	4797.3	2307.3	2381.2	2879.5
Air France-KLM	11.46	4.51	5.21	2.5	2.2	3.5	3.4	64%	73%	0.0%	0.0%	35737.5	36004.9	1676.9	1861.4	4879.9	5226.5
Applied Nutrition	278.50	12.46	13.79	22.4	20.2	15.7	13.5	1%	2%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
AXA European Value Re	246.00	22.22	22.93	10.2	10.7	6.5	6.6	12%	8%	4.2%	4.5%	5775.0	5999.3	350.0	371.6	458.0	470.3
Bank of Ireland	20.34	1.63	1.89	12.5	10.8	1.5	1.4			3.9%	4.7%	4419.1	4631.9	1889.5	2098.4		
Barratt Redrow	314.30	29.61	24.94	10.6	12.6	0.5	0.5	8%	6%	5.2%	0.3%	6074.1	6319.0	589.5	474.5	604.8	492.8
Beauty Tech Group	392.00	26.78	31.87	14.6	12.3	7.9	6.8	7%	10%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Belwey	2109.00	182.17	154.83	11.6	13.6	0.7	0.7	13%	nm	3.6%	4.4%	3147.6	3196.8	322.4	269.3	325.4	272.1
Berkley Group	3360.00	330.87	266.33	11.7	12.6	1.0	0.8	4%	7%	3.1%	1.9%	2383.1	2053.5	449.8	352.1	446.8	368.1
Bredon Group	315.40	29.54	33.09	10.7	9.5	5.6	5.4	9%	10%	5.0%	5.2%	1792.6	1869.8	142.0	154.8	282.1	299.4
C & C Group	106.20	0.10	0.10	16.6	12.4	8.9	7.6	0%	5%	3.4%	4.7%	1569.8	1479.0	70.5	70.5	104.3	104.3
Calm Homes	2.71	0.23	0.25	11.9	10.6	8.5	7.9	4%	9%	4.2%	4.6%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4610.00	2.93	3.16	18.3	17.0	10.9	10.0	4%	4%	2.4%	2.6%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2
Compass Group	31.10	1.48	1.63	21.1	19.1	11.6	10.7	4%	4%	2.4%	2.6%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranwick	5120.00	361.74	322.29	17.0	15.9	8.9	7.9	3%	3%	2.2%	2.3%	2982.5	3129.6	232.8	250.8	336.4	358.8
CRH	86.70	578.28	632.33	15.0	13.7	9.0	8.2	10%	12%	1.8%	1.9%	39995.1	41932.3	5984.2	6484.6	8248.4	8844.3
CVC	6390.00	437.42	511.23	11.0	12.5	6.3	7.5	12%	9%	4.5%	3.6%	15441.9	18336.2	494.4	563.5	728.3	807.0
Diageo	1626.00	1.65	1.68	13.9	13.0	11.3	10.5	8%	6%	2.2%	2.7%	19543.0	18729.9	5901.0	5851.2	6674.0	6334.0
Dole	13.14	129.66	139.84	10.1	9.4	5.3	4.9	9%	13%	2.5%	2.7%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	668.00	8.17	18.19	81.8	36.7	5.7	5.0	nm	nm	2.3%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Enstain	502.60	56.57	69.91	8.9	7.2	7.3	6.8	8%	12%	4.1%	4.3%	5106.5	5307.3	675.8	770.2	957.4	1019.1
Evoke	47.75	17.65	FALSE	2.4	FALSE	4.5	FALSE	56%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	20.00	1.47	1.57	13.6	12.8	1.5	1.5										
Fever-Tree Drinks	861.00	29.41	40.57	29.3	21.2	17.1	13.1	4%	6%	2.1%	2.2%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	92.50	5.78	9.38	16.1	9.9	9.5	6.9	4%	9%	0.0%	0.0%	18738.1	20586.3	2043.9	2887.9	3771.4	3711.1
Forterra	135.80	10.46	11.91	13.0	11.4	7.1	6.0	10%	11%	3.9%	4.4%	369.7	391.4	33.8	38.1	54.1	59.6
Fuller, Smith & Turner	684.00	47.18	52.77	13.3	13.1	7.3	7.7	7%	6%	3.4%	3.4%	397.8	413.3	40.8	48.3	74.6	77.7
Glaxia	22.89	1.61	1.76	14.2	13.0	10.5	9.4	6%	7%	2.1%	2.3%	4223.7	4441.5	435.7	472.9	553.9	590.1
Glennagh Properties	2.34	0.21	0.23	11.1	10.2	8.3	7.1	15%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	988.30	74.47	84.04	13.3	11.8	6.5	5.9	5%	8%	3.9%	4.0%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.78	0.05	FALSE	15.2	FALSE	20.9	FALSE	17%	FALSE	8.9%	FALSE	30.0	FALSE	100.7	FALSE	66.7	FALSE
Greencore	246.20	20.07	24.02	12.3	10.3	7.9	5.9	9%	11%	1.2%	2.0%	3374.4	4091.1	191.2	248.5	336.3	429.9
Group	1798.00	126.55	127.20	14.2	14.1	6.0	5.6	5%	7%	3.8%	3.8%	2281.1	2407.4	192.7	198.4	377.1	399.5
Hammerman	350.40	23.21	25.54	15.1	13.7	1.0	0.9	3%	4%	5.0%	5.4%	227.4	242.5	180.0	203.2	188.8	203.1
Hastellens Materials	146.15	12.79	14.44	11.4	10.1	7.3	6.6	10%	10%	2.7%	3.0%	22179.1	23585.4	3478.8	3856.3	4850.8	5280.2
Hostelworld Group	106.00	0.13	0.18	9.6	7.0	6.2	4.2	12%	19%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	761.50	52.56	56.26	14.5	13.5	8.7	8.0	6%	7%	3.0%	3.2%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	422.60	0.61	0.77	8.1	6.4	3.9	3.5	11%	10%	2.1%	2.3%	33801.5	35574.1	4244.1	4903.0	6855.6	7655.9
Ibstock	76.50	-3.63	5.35	nm	14.3	8.0	6.7	10%	9%	1.5%	3.5%	368.8	390.7	14.5	37.1	58.8	68.3
ICI	7.94																
IBES REIT	1.08	0.16	0.15	6.9	7.1	0.8	0.7	3%	3%	5.0%	5.4%	68.2	72.7	105.0	104.9	102.4	102.4
I D Wetherspoon	804.50	39.18	48.69	20.5	16.5	8.4	7.9	7%	7%	1.5%	1.5%	2222.7	2324.0	129.9	131.3	235.9	246.8
Jet2	1423.00	190.52	113.44	7.5	12.5	1.0	2.1	21%	nm	1.2%	1.2%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kerry Group	85.00	5.13	5.71	16.6	14.9	12.4	11.3	5%	5%	1.8%	2.0%	6861.7	7165.4	952.5	1039.5	1265.9	1357.0
Kingfisher	309.40	23.42	25.18	12.1	12.3	5.3	5.2	10%	8%	4.4%	4.0%	12945.0	12269.6	651.0	687.4	1327.0	1353.7
Kingspan	96.75	4.40	5.73	22.0	16.9	14.5	11.3	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	27.58	0.00	2.23	nm	12.4	9.0	8.3	6%	8%	2.1%	2.5%	2411.0	2578.1	767.7	846.3	965.5	1055.3
Lufthansa	7.68	0.97	1.07	7.9	7.2	7.9	7.5	23%	17%	3.8%	4.2%	42165.6	42688.5	1640.1	1942.4	2981.2	3180.3
Marston's	46.60	8.78	9.99	5.3	4.7	6.9	6.6	17%	17%	0.0%	4.3%	900.3	916.6	164.6	170.4	210.0	215.8
Mitchells & Butlers	274.50	31.43	33.14	8.7	8.3	6.1	5.7	5%	5%	0.0%	0.0%	2792.4	2886.1	331.2	360.0	470.4	483.3
Mondi	853.60	0.51	0.63	19.6	15.7	9.1	7.4	nm	2%	1.8%	3.2%	8403.7	8758.3	369.8	542.3	860.1	1044.3
Origin Enterprises	4.10	0.54	0.55	7.7	7.4	5.3	4.9	nm	13%	4.4%	4.7%	2166.0	2268.3	86.3	87.5	118.2	121.3
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	1173.00	99.27	99.14	11.8	11.8	1.0	1.0	nm	5%	3.4%	3.6%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	445.00	0.37	0.31	13.9	16.8	1.2	1.1	6%	5%	0.0%	0.0%	823.2	857.2	174.9	153.2	276.6	259.9
Rank Group	86.50	9.81	10.33	8.8	8.4	4.5	4.2	5%	9%	3.4%	3.8%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	22.60	2.12	1.76	11.9	14.9	6.5	6.3	6%	6%	1.7%	2.1%	15544.3	15843.0	2459.2	2009.3	3832.6	3569.8
Sainsbury's	45.48	2.86	3.22	22.2	14.1	7.1	6.3	6%	7%	4.0%	4.3%	32928.6	34602.3	2193.5	2952.5	5076.6	5815.7
SSE Group	183.80	13.90	16.67	13.2	11.0	6.7	6.1	5%	6%	2.7%	3.2%	3025.4	3973.6	292.7	330.3	635.0	677.8
Tate & Lyle	558.00	40.50	36.60	11.2	15.2	7.4	8.6	8%	7%	4.4%	3.5%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	80.98	5.25	5.52	15.4	14.7	0.7	0.7	4%	2%	3.0%	3.3%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	605.00	27.94	33.49	21.7	18.1	6.9	6.4	7%	3%	2.0%	2.3%	4520.8	4628.6	116.2	132.9	267.6	289.7
Uniphar	4.04	0.27	0.28	14.9	14.4	9.1	6.6	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Viatry Group	271.60	43.09	49.03	6.3	5.5	2.3	1.6	41%	27%	0.0%	0.0%	3784.1	3942.4	276.8	290.5	348.2	397.2
Wii Smith	383.00	39.76	37.96	9.6	10.1	5.4	5.2	nm	4%	0.0%	0.0%	1589.6	1610.8	111.4	115.5	164.7	168.6
Whitbread	2342.00																
Wickes Group	192.80	30.98	24.54	9.2	7.9	5.0	4.5	4%	10%	6.2%	7.3%	1684.9	1766.1	81.1	90.0	292.5	219.5
Wizz Air	985.00	0.01	-3.47	1426.2	nm	8.0	6.6	47%	35%	0.0%	0.0%	5691.4	6585.3	139.7	-350.3	1318.3	1013.6

Closing prices as of: 17/09/2026