

Goodbody Market Commentary Metrics



05 December 2024																								
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA								
	LC	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025							
ABB Group	5.27	0.81	0.69	6.5	7.7	0.9	0.8			15.8%	14.6%	4794.2	4367.2	2545.5	2049.3									
Air France-KLM	7.19	3.76	4.50	1.9	1.6	3.7	2.5	47%	49%	0.0%	0.0%	31439.5	32867.2	1702.2	1946.6	4340.3	4627.8							
B&M European Value Retail	348.00	36.93	37.12	14.6	9.4	10.0	7.0	6%	8%	2.7%	4.5%	5484.0	5667.1	546.0	569.4	630.0	645.1							
Bank of Ireland	8.42	1.57	1.29	5.4	6.5	0.6	0.6			8.3%	7.7%	4316.1	4073.9	2055.2	1694.2									
Barratt Redrow	145.00	11.27	12.38	19.9	11.7	6.3	6.0	9%	7%	5.3%	5.6%	2266.5	2255.6	1112.2	1118.9	184.5	192.4							
Berkley Group	433.30	27.03	29.84	16.0	14.5	0.8	0.7	1%	6%	3.4%	3.8%	4118.0	4335.6	228.5	421.9	381.0	425.1							
Bellway	2494.00	119.91	160.68	20.8	15.5	0.9	0.8	mm	6%	2.2%	2.4%	2380.2	2700.1	2385.0	287.6	243.2	293.7							
Berkley Group	4136.00	362.23	385.85	11.4	14.5	1.3	1.3	3%	7%	6.3%	6.3%	2579.0	2385.1	580.6	467.1	528.8	443.8							
Bredford Group	462.00	31.92	35.17	14.5	13.1	7.3	6.5	4%	7%	3.1%	3.2%	1605.6	1708.4	163.4	180.1	265.0	288.2							
Brive	1289.00	67.66	74.62	19.1	17.3	19.0	11.1	4%	3%	2.7%	3.0%	1909.1	2003.4	240.8	261.7	314.4	338.6							
Bytes Technology	462.20	19.55	19.85	29.8	29.3	19.1	14.6	3%	3%	6.1%	5.1%	207.0	226.1	56.7	63.8	59.1	65.2							
C.B.C Group	149.00	0.08	0.12	20.5	15.0	9.7	8.5	7%	3%	3.5%	3.4%	1652.5	1678.0	60.0	80.3	93.7	114.3							
Cain Homes	2.21	0.18	0.20	12.5	11.0	9.3	8.7	11%	8%	3.5%	3.4%	852.6	940.8	144.9	156.0	147.2	158.8							
Cores Power	163.30	-6.58	-2.42	mm	mm	mm	mm	mm	mm	0.0%	0.0%	64.9	69.8	-21.3	-26.4	-11.5	-11.5							
Coca-Cola HBC	2854.00	2.18	2.42	15.8	14.2	9.3	8.5	4%	3%	2.8%	3.2%	10554.5	11253.6	1154.4	1270.5	1575.0	1716.8							
Compass Group	2771.00	1.19	1.28	23.4	27.5	12.8	15.9	3%	3%	2.1%	1.8%	4200.1	44397.5	2996.0	3228.9	4273.5	4273.5							
Convatec Group	235.20	0.16	0.17	19.2	17.4	11.3	10.1	3%	3%	2.1%	2.1%	2235.7	2361.4	478.4	517.1	614.2	652.9							
Carwest	5000.00	242.85	265.78	14.6	18.8	7.6	9.1	7%	3%	2.3%	1.8%	2599.2	2756.4	167.3	195.8	265.8	283.3							
CBH	102.37	554.99	606.45	18.6	16.6	11.9	10.8	6%	3%	1.4%	1.4%	35444.8	37684.8	5271.6	5854.4	6923.4	7611.4							
Dalata Hotel Group	4.57	0.52	0.38	13.7	11.9	8.9	7.9	9%	7%	2.8%	3.0%	65.7	64.2	157.0	175.5	228.8	252.6							
Datatec	0.40	-0.06	-0.01	mm	mm	mm	mm	mm	mm	0.0%	0.0%	27.5	30.2	-6.1	-7.3	-3.5	-0.3							
DCC	5585.00	454.49	481.01	11.8	11.6	11.6	6.4	12%	3%	3.9%	3.7%	18858.8	20536.6	568.7	601.7	963.0	963.0							
Devolver Digital	24.50	-0.76	2.44	mm	15.8	25.5	5.4	mm	12%	0.0%	0.0%	109.9	109.6	-3.7	15.0	1.2	19.6							
Diageo	2341.50	1.79	1.72	20.8	17.2	15.8	13.5	3%	3%	2.8%	3.7%	20269.0	20520.8	6359.0	6185.2	6438.0	6506.0							
Dole	14.82	126.50	140.77	11.7	10.5	5.5	5.1	7%	10%	2.2%	2.4%	8270.8	8400.0	270.2	278.5	382.8	392.8							
DS Smith	577.00	33.07	34.45	17.4	16.7	10.1	10.0	mm	2%	3.2%	3.3%	7426.9	7445.9	597.5	604.5	1025.5	1072.5							
easyJet	566.00	63.95	67.69	8.9	8.4	3.1	2.7	5%	12%	2.1%	2.4%	9260.2	9736.4	658.3	695.2	1405.6	1549.7							
Enlan	812.80	26.76	53.01	30.4	15.3	8.3	6.2	3%	6%	1.0%	2.0%	5136.8	5325.7	593.0	770.2	1072.9	1131.2							
Eusek	64.70	7.64	17.12	8.5	3.8	6.1	5.0	1%	41%	0.0%	0.0%	1783.6	1883.0	210.7	255.5	331.3	380.7							
FBD Holdings	12.60	1.64	1.66	7.7	7.6	1.1	1.1			9.5%	9.9%	412.5	422.9	52.9	56.6									
Ferguson	17320.00																							
Fever-Tree Drinks	734.00	26.69	34.07	27.5	21.5	14.9	11.7	6%	5%	2.4%	2.5%	372.3	391.7	39.1	59.4	51.6	63.8							
FD Technologies	1994.00	-28.22	-9.92	mm	mm	mm	23.3	5%	mm	0.0%	0.0%	277.8	252.0	2.6	0.3	23.0	22.7							
Flutter Entertainment	277.17	6.62	9.10	41.9	30.4	21.1	16.4	2%	3%	0.0%	0.0%	14328.5	15944.4	2061.7	2659.2	2571.7	3219.2							
Forterra	178.60	10.49	12.86	17.0	13.9	8.7	7.3	2%	8%	2.5%	3.7%	338.8	363.7	34.7	41.0	55.0	62.3							
Frontier Developments	244.50	-2735.44	587.49	mm	8.4	34.4	3.8	8%	8%	0.0%	0.0%	89.3	90.7	-31.9	-8.2	3.2	27.2							
Games Workshop Group	14270.00	458.78	515.72	31.1	27.7	19.1	17.9	3%	3%	2.9%	3.1%	525.7	571.2	201.8	215.2	240.8	256.2							
Glanbia	14.85	1.40	1.42	10.6	10.4	8.2	7.9	8%	8%	2.8%	3.1%	3928.3	4218.5	395.3	393.5	542.0	542.4							
Glanvagh Properties	1.59	0.17	0.19	9.4	8.3	10.4	8.9	mm	15%	0.0%	0.0%	955.7	1017.5	132.7	141.9	136.6	146.1							
Grafton Group	935.00	64.83	72.28	14.4	12.9	8.7	8.0	7%	5%	4.0%	4.3%	2270.2	2478.7	147.0	164.9	279.0	301.9							
Greencast Renewables	0.87	0.14	0.14	6.1	6.0	13.3	14.5	7%	16%	7.8%	8.2%	216.9	216.6	189.4	189.2	189.4	189.2							
Greencore	218.00	12.47	14.10	17.5	15.5	8.1	7.6	6%	3%	0.8%	1.3%	1810.4	1878.1	92.4	97.8	151.4	151.4							
Greggs	2758.00	137.95	153.18	20.0	18.0	9.0	8.2	2%	2%	2.5%	2.8%	2048.4	2268.2	195.7	220.8	340.9	382.7							
Hammerson	294.80																							
Heidelberg Materials	120.80	9.74	10.42	12.4	11.6	7.4	6.7	7%	7%	2.1%	2.1%	22693.8	23477.2	2683.4	2852.1	3625.8	3782.0							
Hostelworld Group	131.50	0.14	0.17	11.7	9.3	9.6	6.8	8%	11%	0.0%	0.0%	94.6	104.7	7.3	10.8	21.4	25.5							
Howden Joinery	842.50	46.11	47.32	18.3	17.8	10.5	10.0	2%	5%	2.5%	2.8%	2329.9	2403.7	338.8	357.2	490.0	506.8							
IAG	275.10	0.44	0.47	7.6	7.1	3.5	3.1	mm	0%	0.5%	2.4%	31596.1	32808.0	3540.8	3758.4	5794.3	6204.4							
Ibstock	191.80	8.63	11.00	22.2	17.4	11.3	9.5	1%	6%	2.3%	2.9%	395.1	424.5	54.0	64.9	83.4	95.7							
ICG	5.54	0.34	0.38	16.1	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	12.2	6.6	61.6	0.6	3%	3%	5.8%	6.2%	65.1	65.2	56.9	87.3	57.6	85.1							
ITM Power	34.50	-4.04	-5.68	mm	mm	mm	mm	mm	mm	0.0%	0.0%	16.5	-43.9	-30.2	-36.1									
J D Wetherspoon	620.50	46.80	53.40	15.8	11.6	8.1	7.3	5%	10%	1.6%	1.9%	2035.5	2107.7	139.5	152.8	241.7	255.0							
Jet2	1600.00	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 Matthey	1405.00	156.57	170.95	9.0	8.2	6.3	5.6	14%	5%	5.5%	5.8%	4045.0	4033.1	429.5	467.6	558.9	611.7							
Kainos Group	805.00	39.04	30.50	29.9	26.4	19.7	15.9	5%	5%	2.1%	3.0%	382.4	365.1	60.8	47.2	69.0	54.1							
Kerry Group	91.45	4.63	5.17	19.7	17.7	14.3	12.8	4%	4%	1.4%	1.5%	7906.6	8189.1	933.3	1027.5	1240.1	1344.3							
Knauf	254.50	21.60	20.31	11.1	12.9	5.2	5.9	11%	9%	5.2%	4.9%	12980.0	12801.3	673.0	622.2	1315.0	1319.3							
Kingspan	72.45	3.60	3.99	20.1	18.2	13.4	11.9	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	mm	mm	mm	mm	mm	mm	0.0%	0.0%	4.4	8.6	-4.0	-3.5	-3.8	-3.8							
Lufthansa	6.29	1.18	1.53	5.3	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	42.90	5.97	8.02	7.2	5.4	7.8	7.6	13%	15%	0.0%	0.0%	893.9	159.8	158.8	159.2	193.0	202.9							
Mitchells & Butlers	250.00	25.36	27.75	9.9	9.0	6.8	6.3	9%	8%	0.0%	0.0%	2625.2	2753.6	305.3	319.9	442.5	461.2							
Molten Ventures	331.50	-21.44	48.11	mm	6.9	mm	6.3	2%	11%	0.0%	0.0%	-9.2	126.5	-39.2	96.9	-38.8	96.9							
Mondi	1204.50	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE						
NCC Group	157.60	0.00	0.00	mm	mm	mm	12.0	4%	6%	0.1%	0.1%	330.4	338.5	16.0	25.0	37.7	46.0							
Orion Enterprises	2.99	0.48	0.52	6.7	5.8	5.4	5.3	mm	mm	5.2%	5.7%	2045.7	2222.9	76.6	78.9	107.4	112.6							
Permian TSB	1.52	0.17	0.13	9.0	11.2	0.4	0.4	mm	mm	1.3%	2.3%	666.2	656.2	161.0	135.7									
Persimmon	1274.50	82.14	93.29	15.5	13.7	1.2	1.1	mm	3%	3.1%	3.1%	3042.2	3338.8	379.4	437.0	400.1	459.5							
Playtech	730.00																							
Bank Group	87.00	6.16	7.76	12.8	11.2	5.6	5.1	5%	1%	0.0%	1.5%	734.8	782.2	46.4	55.7	94.1	105.7							
Benalytix	7.00	-0.41	-0.34	mm	mm	mm	mm	mm	mm	0.0%	0.0%	10.4	-30.9	-35.1	-29.1									
Bynair	19.04	1.67	1.42	10.2	13.4	5.9	6.6	5%	9%	1.0%	2.0%	13443.8	13918.1	2060.7	1666.6	3120.2	2971.2							
STG	19.30																							
Smith+Nephew	12.51	0.98	1.16	12.7	10.8	9.1	8.2	5%	6%	3.1%	3.3%	5797.7	6110.0	1067.5	1219.8	1487.6	1646.1</							