

Goodbody Market Commentary Metrics



20 May 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	6.50	0.75	0.78	8.6	8.3	0.9	0.9			5.9%	6.4%	4433.5	4399.4	2114.3	2022.1		
Air France-KLM	8.64	4.80	5.60	1.8	1.5	3.4	3.0	72%	112%	0.0%	0.0%	33158.0	34514.6	1888.0	2114.7	4685.1	5008.0
Applied Nutrition	126.60	8.57	9.66	14.8	13.1	10.4	8.7	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6
B&M European Val	341.40	35.25	35.85	9.7	9.5	7.1	7.1	8%	9%	4.6%	4.7%	5572.0	5893.6	537.2	547.6	620.5	634.5
Bank of Ireland	11.54	1.24	1.46	9.3	7.9	0.8	0.8			5.5%	6.0%	4023.1	4117.0	1670.9	1740.2		
Bakkavor Group	197.40																
Barratt Redrow	471.30	30.44	34.82	15.5	13.5	0.8	0.8	6%	11%	3.4%	3.6%	5559.7	6075.9	601.6	720.8	614.4	726.6
Bellway	2728.00	160.68	191.29	17.0	14.3	0.9	0.9	4%	6%	2.4%	2.9%	2700.1	2972.6	287.6	335.4	293.7	335.5
Berkeley Group	4214.00	285.85	292.86	14.7	14.4	1.3	1.3	7%	5%	6.2%	6.2%	2383.5	2452.6	467.1	478.8	443.8	455.8
Breedon Group	467.40	36.60	42.29	12.8	11.1	6.5	5.4	5%	11%	3.3%	3.4%	1862.4	1997.3	185.8	211.4	309.6	343.0
Bytes Technology	505.00	25.75	27.00	19.6	18.7	14.7	12.7	5%	6%	6.2%	6.9%	222.1	248.3	72.7	81.7	74.2	83.4
C & C Group	154.00	0.11	0.12	16.2	15.1	8.9	8.9	4%	5%	3.4%	3.6%	1666.3	1707.4	76.9	79.4	110.9	113.4
Cairn Homes	2.06	0.20	0.23	10.1	9.1	6.5	6.5	4%	14%	4.4%	4.9%	961.1	1007.4	160.4	171.5	164.8	176.4
Ceres Power	72.35	-8.62	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE
Coca-Cola HBC	3950.00	2.56	2.78	18.3	16.9	11.0	10.2	3%	4%	2.5%	2.8%	11654.6	12355.2	1321.6	1427.8	1739.7	1858.6
Compass Group	2627.00	1.27	1.39	27.6	25.3	15.9	15.0	3%	3%	1.8%	2.0%	44276.1	46981.4	3212.6	3446.7	4253.3	4511.0
Cranswick	5260.00	266.23	281.61	19.8	18.7	9.6	9.0	4%	4%	1.7%	1.7%	2721.5	2849.8	195.8	206.6	282.2	293.1
CRH	98.65	553.35	632.99	17.8	15.6	10.7	10.0	9%	10%	1.5%	1.6%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0
Dalata Hotel Group	5.60	0.37	0.36	15.3	15.6	9.1	9.0	6%	7%	2.5%	2.7%	664.9	671.1	167.5	164.9	241.8	239.8
Datalex	0.34	-0.01	0.00	nm	427.5	232.6	25.3	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7
DCC	4802.00	477.33	465.63	10.1	10.3	6.1	6.3	10%	12%	4.3%	4.5%	20507.9	19924.2	597.1	545.5	958.4	885.8
Devolver Digital	20.50	1.30	1.72	21.1	15.9	4.2	3.4	10%	11%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	2132.00	1.64	1.73	17.4	16.5	13.7	13.1	5%	5%	3.6%	3.6%	20185.2	20900.3	5944.5	6222.9	6402.6	6656.0
Dole	14.37	129.83	141.67	11.1	10.1	5.1	4.6	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5	393.1	408.0
easyJet	560.00	77.15	81.30	7.3	6.9	2.3	2.2	16%	11%	2.5%	2.8%	10297.1	10760.1	813.6	856.7	1647.7	1757.8
Entain	770.60	45.45	66.86	17.0	11.5	8.2	7.6	6%	7%	2.6%	2.7%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	54.00	11.35	17.65	4.8	3.1	5.4	4.6	31%	44%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	12.95	1.66	FALSE	7.8	FALSE	1.1	FALSE			9.7%	FALSE	422.9	FALSE	56.6	FALSE		
Ferguson	13670.00																
Fever-Tree Drinks	855.00	24.15	29.72	35.4	28.8	19.7	17.2	4%	4%	2.1%	2.2%	374.5	412.0	30.9	37.0	44.9	52.0
FD Technologies	2445.00																
Flutter Entertainment	248.84	9.08	13.07	27.4	19.0	15.4	11.8	4%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5
Forterra	189.00	12.86	17.33	14.7	10.9	7.7	6.2	8%	8%	3.5%	4.8%	363.7	392.5	41.0	52.6	62.3	74.7
Frontier Developm	198.40	587.49	849.11	0.3	0.2	1.8	1.5	9%	11%	0.0%	0.0%	90.1	96.7	8.2	10.3	40.8	44.1
Fuller, Smith & Tu	618.00	30.21	34.76	20.5	17.8	8.7	8.2	1%	3%	3.2%	3.4%	374.6	396.6	49.3	41.0	65.8	69.8
Games Workshop	15680.00	542.36	571.01	28.9	27.5	18.1	17.1	3%	4%	2.9%	3.1%	601.2	641.3	236.7	248.7	277.8	294.1
Glanbia	13.56	1.27	1.42	10.7	9.5	8.3	7.3	8%	10%	3.3%	3.7%	3836.5	3938.2	343.8	381.9	491.1	530.6
Glenveagh Properti	1.70	0.19	0.21	8.8	8.1	10.0	8.5	8%	17%	0.0%	0.0%	1005.2	1072.3	141.8	148.0	145.0	151.4
Grafton Group	1021.20	69.87	77.31	14.6	13.2	7.0	6.4	5%	6%	3.7%	3.9%	2501.5	2592.6	159.3	176.0	309.3	330.0
Greencoat Renewa	0.73	0.14	0.14	5.1	5.1	13.7	14.9	19%	19%	9.7%	10.2%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	203.00																
Greggs	1999.00	139.34	146.38	14.3	13.7	6.7	6.2	nm	4%	3.5%	3.7%	2189.2	2375.6	204.4	218.0	368.7	403.3
Hammerson	268.00																
Heidelberg Material	188.65	10.42	FALSE	18.1	FALSE	9.8	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	120.50	0.17	0.20	8.4	7.0	6.1	4.5	12%	14%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1
Howden Joinery	846.00	46.31	51.01	18.3	16.6	10.0	9.5	5%	5%	2.8%	3.3%	2346.0	2433.2	341.3	367.9	499.6	529.3
IAG	331.60	0.56	0.66	7.0	6.0	3.1	2.7	13%	18%	3.0%	3.8%	33108.3	34316.8	4350.3	4641.9	6969.7	7495.9
Ibstock	191.20	11.00	13.41	17.4	14.3	9.5	8.2	6%	5%	2.9%	3.7%	424.5	456.0	64.9	77.6	95.7	109.6
ICG	5.16	0.38	0.41	13.6	12.5	6.8	6.1	13%	6%	3.2%	3.3%	641.4	661.0	74.0	79.5	143.0	148.5
IRES REIT	1.07	0.14	FALSE	7.8	FALSE	69.7	0.0	4%	FALSE	5.2%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE
ITM Power	45.70	-5.68	-5.22	nm	nm	nm	nm	nm	nm	0.0							