

Goodbody Market Commentary Metrics



21 September 2026																	
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
	1c	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
All Group	11.66	0.86	0.96	13.2	12.2	1.7	1.7	3.4	3.4	64%	74%	4660.1	4293.1	2327.1	2381.2	288.9	288.9
Air France-KLM	11.44	4.51	5.23	2.5	2.2	3.5	3.4	64%	74%	0.0%	0.0%	35271.5	36004.9	1676.9	1861.4	4879.9	5226.5
Applied Nutrition	271.90	12.46	13.79	21.8	19.7	15.2	13.1	1%	3%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
B&M European Value Re	235.20	22.22	22.53	10.2	10.3	6.5	6.4	12%	8%	4.2%	4.7%	5775.0	5999.3	350.0	371.6	458.0	470.3
Bank of Ireland	20.23	1.63	1.89	12.4	10.7	1.5	1.4	4.0%	4.7%	4.0%	4.7%	4419.1	4631.9	1889.5	2098.4		
Barratt Redrow	305.70	29.61	24.94	10.3	12.3	0.5	0.5	8%	7%	5.4%	0.3%	6074.1	6319.0	589.5	474.5	604.8	492.8
Beauty Tech Group	402.00	26.78	31.87	15.0	12.6	8.1	7.0	7%	10%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Belwey	2048.00	182.17	154.83	11.2	13.2	0.7	0.6	13%	nm	3.7%	4.5%	3147.6	3194.8	322.4	269.3	325.4	272.1
Beckley Group	3288.00	330.87	266.34	11.7	14.3	1.0	0.8	8%	7%	3.1%	2.6%	2382.1	2052.5	469.8	352.1	446.8	368.1
Bredon Group	312.80	29.54	33.09	10.6	9.5	5.6	5.3	10%	10%	5.0%	5.3%	1792.6	1869.8	143.0	154.8	282.1	299.4
C & C Group	103.80	0.10	0.10	16.6	12.1	8.9	7.5	0%	5%	3.4%	4.8%	1569.8	1479.0	70.5	70.5	104.3	104.3
Calm Homes	7.65	0.23	0.25	11.6	10.4	8.2	7.7	4%	8%	4.3%	4.7%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4248.00	2.93	3.16	16.9	15.7	10.1	9.3	4%	4%	2.6%	2.8%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2
Compass Group	29.97	1.48	1.63	20.3	18.4	11.2	10.4	4%	5%	2.5%	2.7%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranwick	5060.00	301.74	322.29	17.0	15.7	8.9	7.8	3%	3%	2.2%	2.3%	2982.5	3129.6	232.8	250.8	336.4	358.8
CRH	86.15	578.28	632.33	14.9	13.6	9.0	8.1	10%	12%	1.8%	1.9%	39995.1	41932.3	5984.2	6484.6	8248.4	8844.3
CVC	6425.00	437.49	511.23	11.0	12.8	5.3	7.6	12%	6%	4.5%	3.5%	15441.9	18336.2	494.4	563.5	728.3	807.0
Dapco	1696.00	1.65	1.68	13.9	12.8	11.3	10.4	8%	6%	2.2%	2.7%	19543.0	18728.9	5901.0	5851.2	6614.0	6334.0
Dole	13.03	129.66	139.84	10.0	9.3	5.3	4.8	9%	14%	2.5%	2.7%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	667.40	8.17	18.19	81.7	36.7	5.7	5.0	nm	nm	2.3%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Entrain	476.70	56.57	69.51	8.4	6.8	7.1	6.6	9%	12%	4.3%	4.6%	5106.5	5307.3	675.8	779.2	957.4	1019.1
Evoke	40.55	17.65	FALSE	2.3	FALSE	4.5	FALSE	99%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	19.45	1.47	1.57	13.2	12.4	1.5	1.5										
Fever-Tree Drinks	840.50	29.41	40.57	28.6	20.7	16.7	12.8	4%	6%	2.2%	2.3%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	89.56	5.78	9.38	15.5	9.6	9.3	6.8	4%	9%	0.0%	0.0%	18738.1	20586.3	2043.9	2887.9	3711.1	3711.1
Forterra	134.80	10.46	11.93	12.9	11.3	7.1	6.0	11%	11%	3.9%	4.4%	369.7	391.4	33.8	38.1	54.1	59.6
Fuller, Smith & Turner	692.00	47.18	52.77	13.3	13.2	7.3	7.8	7%	6%	3.4%	3.3%	397.8	413.3	40.8	48.3	74.6	77.7
Glanbia	21.58	1.61	1.76	13.4	12.2	9.9	8.8	6%	7%	2.2%	2.4%	4223.7	4441.5	435.7	472.9	553.9	590.3
Glanvagh Properties	2.31	0.21	0.23	10.9	10.1	8.2	7.0	15%	11%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	960.50	74.47	84.04	12.9	11.4	6.3	5.8	5%	8%	4.0%	4.1%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.77	0.05	FALSE	15.1	FALSE	20.8	FALSE	17%	FALSE	8.9%	FALSE	30.0	FALSE	100.7	FALSE	66.7	FALSE
Greencore	244.20	20.07	24.02	12.2	10.2	7.8	5.8	9%	11%	1.2%	2.0%	3374.4	4091.1	191.2	248.5	336.3	429.9
Greppa	1800.00	126.59	127.20	14.2	14.2	6.0	5.6	5%	7%	3.8%	3.8%	2381.1	2407.4	197.7	198.4	377.1	399.5
Hammerman	343.40	20.24	25.54	14.8	13.4	9.0	8.0	3%	5%	5.1%	5.5%	227.4	241.5	180.0	203.2	188.8	203.1
Hastellens Materials	143.90	12.79	14.44	11.3	10.0	7.2	6.5	10%	10%	2.8%	3.0%	22179.1	23585.4	3476.8	3856.3	4850.8	5280.2
Hostelworld Group	100.00	0.13	0.18	9.1	6.6	5.8	3.9	13%	20%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	750.00	52.56	56.26	14.3	13.3	8.6	7.8	6%	7%	3.0%	3.2%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	419.30	0.61	0.77	8.1	6.4	3.9	3.5	12%	10%	2.1%	2.3%	33801.5	35574.1	4244.1	4903.0	6855.6	7655.9
Ibstock	74.90	-3.63	5.35	nm	14.0	7.9	6.6	10%	9%	1.5%	3.6%	368.8	390.7	14.5	37.1	58.8	68.3
ICG	7.94																
IBIS REIT	1.07	0.18	0.15	6.9	7.1	0.8	0.7	3%	3%	5.1%	5.5%	68.2	72.7	105.0	104.9	102.4	102.4
I D Wetherston	801.50	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	1399.00	190.52	113.44	7.3	12.3	0.9	2.1	21%	nm	1.3%	1.3%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kerry Group	82.95	5.13	5.71	16.2	14.5	12.1	11.0	5%	5%	1.9%	2.0%	6861.7	7165.4	952.5	1039.5	1265.9	1357.0
Kingfisher	301.80	23.42	25.14	12.1	12.0	5.3	5.1	10%	9%	4.4%	4.1%	12845.0	12829.6	651.0	687.4	1327.0	1353.7
Kingspan	96.50	4.40	5.73	22.0	16.8	14.5	11.3	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	27.09	0.00	2.23	nm	12.1	8.9	8.2	6%	6%	2.1%	2.6%	2411.0	2578.1	767.7	846.3	965.5	1055.3
Lufthansa	7.58	0.97	1.07	7.8	7.1	7.9	7.5	23%	17%	3.8%	4.2%	42165.6	42688.5	1640.1	1942.4	2981.2	3180.3
Marston's	45.70	8.78	9.99	5.2	4.6	6.9	6.5	18%	17%	0.0%	4.4%	900.3	916.6	164.6	170.4	210.0	215.8
Mitchells & Butlers	272.50	31.43	33.14	8.7	8.3	6.1	5.7	5%	6%	0.0%	0.0%	2796.4	2886.3	331.2	360.0	470.4	483.3
Mondi	832.60	0.51	0.63	19.2	15.3	9.0	7.3	nm	3%	3.9%	3.3%	8403.7	8758.3	369.8	543.3	860.1	1084.3
Origin Enterprises	2.05	0.54	0.55	7.6	7.3	5.3	4.8	nm	13%	4.5%	4.7%	2166.0	2268.3	86.3	87.5	118.2	121.3
Permanent TSB	2.98	0.23	0.27	13.2	11.0	0.7	0.7			2.3%	4.0%	708.5	762.2	191.4	219.9		
Persimmon	1151.50	99.27	99.14	11.6	11.6	1.0	1.0	nm	5%	3.5%	3.6%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	415.60	0.37	0.31	13.0	15.7	1.1	1.0	7%	6%	0.0%	0.0%	823.2	857.2	174.9	153.2	276.6	259.9
Rank Group	84.10	9.81	10.33	8.6	8.1	4.4	4.1	5%	9%	3.5%	3.9%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	22.62	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	46.31	2.05	2.22	21.6	19.8	7.2	6.8	6%	8%	5.1%	4.4%	32928.6	34602.3	2193.5	2952.5	5076.6	5814.9
SSE Group	181.40	13.90	16.67	13.1	10.9	6.4	6.2	5%	6%	2.8%	3.2%	3025.4	3973.6	297.7	330.2	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	79.28	5.25	5.52	15.1	14.8	0.7	0.7	4%	2%	3.0%	3.4%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	596.00	27.84	33.49	21.3	17.4	6.9	6.3	7%	3%	2.0%	2.3%	4520.8	4628.6	116.2	132.9	267.6	289.7
Uniphar	4.02	0.27	0.28	14.8	14.4	9.0	6.6	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Viatry Group	262.60	43.09	49.03	6.1	5.4	2.2	1.5	42%	28%	0.0%	0.0%	3784.1	3942.4	276.8	290.5	348.2	397.2
Wii Smith	369.00	39.76	37.96	9.3	9.7	5.3	5.1	nm	4%	0.0%	0.0%	1589.6	1610.8	111.4	115.5	164.2	168.6
Whitbread	2311.00																
Winkles Group	193.60	30.98	24.54	9.2	7.8	5.0	4.5	4%	10%	6.2%	7.2%	1684.9	1766.1	83.1	90.0	292.5	219.5
Wizz Air	988.50	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: 20/09/2026