

Goodbody Market Commentary Metrics



24 June 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	6.69	0.75	0.78	8.9	8.6	1.0	0.9			5.7%	6.2%	4433.5	4399.4	2114.3	2022.1		
Air France-KLM	7.92	4.80	5.60	1.7	1.4	3.3	3.0	79%	123%	0.0%	0.0%	33158.0	34514.6	1888.0	2114.7	4685.1	5008.0
Applied Nutrition	126.80	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
BAM European Val	263.90	34.42	34.55	11.9	7.6	8.2	5.9	7%	12%	3.7%	5.7%	5571.0	5892.6	527.0	536.5	619.0	629.9
Bank of Ireland	11.62	1.24	1.46	9.3	8.0	0.9	0.8			5.5%	5.9%	4023.1	4117.0	1670.9	1740.2		
Bakkavor Group	217.50																
Barratt Redrow	462.80	30.44	34.82	15.2	13.3	0.8	0.8	6%	11%	3.5%	3.7%	5559.7	6075.9	601.6	720.8	614.4	726.6
Bellway	2826.00	171.59	198.95	16.5	14.2	0.9	0.9	2%	5%	2.3%	2.8%	2759.5	3010.1	297.9	339.7	303.9	339.8
Berkeley Group	3810.00	285.85	292.86	13.3	13.0	1.2	1.2	8%	6%	6.9%	6.9%	2383.5	2452.6	467.1	478.8	443.8	455.8
Bresdon Group	390.40	33.99	41.15	11.5	9.5	6.0	5.0	7%	10%	3.9%	4.1%	1801.5	1939.2	174.1	206.9	294.4	335.4
Bytes Technology	515.00	25.75	27.00	20.0	19.1	15.1	13.0	5%	6%	6.1%	6.8%	222.1	248.3	72.7	81.7	74.2	82.4
C & C Group	169.40	0.11	0.12	17.6	16.3	9.4	9.4	4%	5%	3.1%	3.3%	1666.3	1707.4	76.9	79.4	110.9	113.4
Cairn Homes	2.15	0.20	0.23	10.6	9.5	6.9	6.8	4%	14%	4.2%	4.7%	961.1	1007.4	160.4	171.5	164.8	176.4
Coca-Cola HBC	3878.00	2.56	2.78	17.7	16.3	10.7	9.9	4%	4%	2.6%	2.9%	11654.6	12355.2	1321.6	1427.8	1739.7	1858.6
Compass Group	2485.00	1.27	1.39	26.3	24.1	15.2	14.3	3%	3%	1.9%	2.1%	44276.1	46981.4	3212.6	3446.7	4253.3	4511.0
Cranswick	5290.00	273.41	292.01	17.3	18.1	9.2	9.1	3%	3%	2.1%	2.0%	2723.3	2942.6	190.8	220.0	293.2	315.2
CRH	88.15	553.35	632.99	15.9	13.9	9.8	9.1	10%	11%	1.7%	1.8%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0
Dalata Hotel Group	6.40																
Datalex	0.34	-0.01	0.00	nm	438.0	238.5	26.0	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7
DCC	4622.00	477.33	465.63	9.7	9.9	6.0	6.1	11%	12%	4.5%	4.7%	20507.9	19924.2	597.1	545.5	958.4	885.8
Devolver Digital	23.00	1.30	1.72	23.8	18.0	5.2	4.2	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	1881.00	1.64	1.72	15.5	14.7	12.7	12.1	4%	6%	4.1%	4.1%	20214.1	20909.8	5949.5	6218.9	6408.6	6652.3
Dole	14.14	129.83	141.67	10.9	10.0	5.0	4.5	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5	393.1	408.0
easyJet	519.00	76.39	80.78	6.8	6.4	2.1	2.0	19%	11%	2.7%	3.0%	10285.0	10762.9	806.4	851.7	1640.5	1752.8
Entain	847.20	45.45	66.86	18.6	12.7	8.6	8.0	5%	6%	2.3%	2.4%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evolve	57.00	11.35	12.65	5.0	3.2	5.4	4.6	30%	42%	0.0%	0.0%	1847.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	13.35	1.66	FALSE	8.0	FALSE	1.1	FALSE			9.4%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	920.00	24.15	29.72	38.1	31.0	21.4	18.7	3%	4%	1.9%	2.0%	374.5	412.0	30.9	37.0	44.9	52.0
FD Technologies	2425.00																
Flutter Entertainment	269.10	9.08	13.07	29.7	20.6	16.4	12.6	3%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5
Forterra	186.00	10.88	14.00	17.1	13.3	7.9	6.3	9%	12%	2.6%	3.7%	373.6	404.9	39.3	48.1	61.3	72.0
Frontier Developm	320.50	587.49	849.11	0.5	0.4	3.0	2.5	6%	7%	0.0%	0.0%	90.1	96.7	8.2	10.3	40.8	44.1
Fuller, Smith & Tu	586.00	34.22	40.26	19.2	14.6	8.6	7.8	nm	5%	3.0%	3.7%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop	16300.00	542.36	571.01	30.1	28.5	18.9	17.8	3%	4%	2.8%	3.0%	601.2	641.3	236.7	248.7	277.8	294.1
Glanbia	14.54	1.27	1.42	11.5	10.2	8.8	7.8	8%	9%	3.1%	3.4%	3836.5	3938.2	343.8	381.9	491.1	530.6
Glenveagh Proper	1.74	0.20	0.21	8.9	8.3	10.4	9.0	8%	16%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9
Grafton Group	987.60	69.84	77.34	14.1	12.8	6.7	6.2	4%	6%	3.8%	4.1%	2510.4	2601.8	159.3	176.0	309.3	330.0
Greencoat Renewa	0.76	0.14	0.14	5.3	5.3	13.8	15.1	18%	19%	9.3%	9.8%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	224.50																
Greggs	1904.00	139.34	146.38	13.7	13.0	6.5	5.9	nm	4%	3.7%	3.8%	2189.2	2375.6	204.4	218.0	368.7	403.3
Hammerston	295.00																
Heidelberg Matera	177.60	10.42	FALSE	17.1	FALSE	9.3	FALSE	5%	FALSE	1.4%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	147.00	0.11	0.15	15.3	11.8	9.9	7.5	7%	10%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
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	313.10	0.56	0.68	6.5	5.4	2.9	2.5	13%	19%	3.7%	4.1%	33203.3	34415.3	4332.3	4793.8	6951.7	7647.8
Ibstock	151.40	8.23	11.39	18.4	13.3	9.7	7.4	3%	9%	2.7%	3.8%	393.5	440.9	45.6	62.7	81.0	101.9
ICG	5.50	0.38	0.41	14.5	13.3	7.2	6.4	12%	5%	3.0%	3.1%	641.4	661.0	74.0	79.5	143.0	148.5
IBES REIT	1.05	0.14	FALSE	7.7	FALSE	68.5	0.0	4%	FALSE	5.3%	FALSE	65.2	FALSE	85.3	FALSE	85.1	FALSE
J.D. Wetherspoon	732.50	50.97	58.99	14.4	12.4	8.4	8.0	2%	4%	1.6%	1.6%	2117.8	2229.4	141.4	153.0	249.6	261.7
Jet2	1791.00	184.35	184.43	9.7	9.7	2.3	1.8	14%	12%	0.2%	1.0%	7366.6	8055.8	469.1	493.1	749.2	825.5
Kainos Group	745.50	30.50	36.18	24.4	20.6	14.5	12.2	6%	7%	3.3%	3.3%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	93.40	5.02	5.56	18.6	16.8	14.3	13.1	4%	4%	1.5%	1.6%	7117.2	7362.4	960.0	1045.0	1262.7	1349.9
Kingfisher	274.30	20.41	19.65	12.9	14.0	5.5	5.6	10%	9%	4.7%	4.5%	12784.0	12889.1	628.0	608.3	1299.0	1276.0
Kingspan	72.80	4.00	4.42	18.2	16.5	11.8	10.6	5%	5%	0.8%	0.9%	9375.0	9822.1	927.1	1013.4	1235.1	1333.4
Lufthansa	6.85	1.07	1.26	6.4	5.4	6.9	6.3	19%	21%	4.4%	4.4%	39742.1	41642.7	1883.1	2153.1	3166.8	3489.1
Marston's	41.35	7.80	8.74	5.3	4.7	7.3	6.8	15%	16%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	281.50	28.53	29.75	9.9	9.5	6.6	6.3	7%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5
Molten Ventures	292.20	48.11	47.64	6.1	6.1	7.7	5.5	12%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	1199.00	1.04	1.36	13.4	10.3	7.7	6.4	3%	10%	4.6%	4.9%	7802.2	8299.0	744.0	928.7	1212.2	1418.3
NCC Group	146.40	5.53	7.09	26.5	20.7	9.8	8.6	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.66	0.52	0.57	7.1	6.4	6.1	5.7	nm	10%	4.7%	4.9%	2189.6	2252.6	78.9	83.8	110.8	117.3
Permanent TSB	2.02	0.12	0.22	17.2	9.1	0.5	0.4			1.0%	4.4%	654.2	694.6	146.4	173.2		
Persimmon	1312.50	94.75	110.68	13.9	11.9	1.2	1.1	3%	9%	3.0%	3.0%	3433.1	3730.0	446.6	515.8	468.5	539.7
Playtech	336.00	0.12	0.20	33.2	19.6	0.7	0.6	1%	3%	0.0%	0.0%	797.8	831.6	65.4	89.4	166.7	193.7
Rank Group	129.20	7.76	8.63	16.7	15.0	7.0	6.6	1%	1%	1.0%	1.1%	782.2	818.7	55.7	60.7	105.7	112.1
Ryanair	23.10	1.45	1.93	12.5	11.9	6.7	6.8	10%	10%	2.2%	1.8%	13948.5	15149.9	1558.0	2199.4	2772.4	3445.3
Simurfit Westrock	43.16	3.55	3.94	12.2	11.0	7.1	6.3	4%	7%	3.4%	3.9%	32057.8	33418.6	2775.3	3240.2	5083.5	5616.8
SSP Group	164.50	11.99	13.78	13.7	11.9	7.1	6.4	nm	2%	2.6%	2.9%	3683.5	3851.0	275.0	297.2	571.6	646.7
Tate & Lyle	530.00	49.71	44.88	13.2	11.8	10.2	8.0	7%	8%	3.0%	3.7%	1736.4	2145.1	287.8	317.3	380.8	455.4
Taylor Wimpey	119.90	8.44	9.52	14.2	12.6	1.0	1.0	4%	7%	7.9%	8.3%	3736.4	3983.2	441.7	498.1	449.2	504.7
Everplay Group	322.00	24.13	24.49	13.3	13.1	5.2	4.8	5%	5%	0.0%	0.0%	173.9	174.9	31.5	32.2	65.3	65.4
Travis Perkins	616.50	49.14	60.01	12.5	10.3	6.0	5.4	7%	7%	3.7%	4.5%	4697.5	4874.0	161.4	196.2	354.3	391.5
Trustpilot Group	231.20	0.03	0.05	89.7	60.1	48.9	32.0	2%	3%	0.0%	0.0%	241.6	276.5	15.6	29.8	24.2	37.2
Uniphar	3.90	0.22	0.24	17.7	16.5	9.6	8.8	6%	7%	0.5%	0.5%	2890.7	2981.4	97.1	107.0	133.0	143.3</