

Goodbody Market Commentary Metrics



29 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	11.52	0.86	0.96	13.0	12.0	1.7	1.7	64%	64%	4.7%	5.1%	4660.1	4293.1	2327.3	2381.2	288.1	288.1
Air France-KLM	11.47	4.51	5.23	2.5	2.2	3.5	3.4	64%	73%	0.0%	0.0%	35273.5	36004.9	1676.9	1861.4	4879.9	5226.5
Applied Nutrition	270.50	12.46	13.79	21.7	19.6	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	245.80	22.22	22.53	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	19.79	1.63	1.89	12.2	10.5	1.4	1.4			4.0%	4.8%	4419.1	4631.9	1889.5	2098.4		
Barratt Redrow	304.00	26.43	25.32	13.0	12.0	0.6	0.5	9%	1%	1.7%	1.0%	6055.0	6263.4	556.5	489.7	569.1	507.6
Beauty Tech Group	445.00	26.78	31.87	16.6	14.0	9.1	7.8	7%	9%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Belwey	2042.00	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	3330.00	330.87	266.34	11.7	12.5	1.0	0.8	8%	7%	3.1%	1.9%	2382.1	2052.5	469.8	352.1	446.8	368.1
Bredon Group	305.80	29.54	33.09	10.4	9.2	5.8	5.3	10%	11%	5.2%	5.4%	1792.6	1860.8	143.0	154.8	282.1	299.4
C & C Group	104.60	0.10	0.10	16.6	12.2	8.9	7.5	0%	5%	3.4%	4.7%	1569.8	1479.0	70.5	70.5	104.3	104.3
Calm Homes	2.67	0.23	0.25	11.7	10.5	8.3	7.8	4%	8%	4.3%	4.7%	1065.6	1204.2	181.7	200.5	183.8	203.1
Coca-Cola HBC	4360.00	2.93	3.14	17.3	16.0	10.3	9.5	4%	4%	2.6%	2.8%	12465.9	13221.3	1499.8	1621.7	1937.0	2072.2
Compass Group	29.12	1.48	1.63	19.7	17.9	10.9	10.1	4%	5%	2.5%	2.8%	50664.5	54369.0	3739.1	4080.6	5119.0	5487.9
Cranswick	5080.00	301.74	322.29	17.0	15.8	8.9	7.8	3%	3%	2.2%	2.3%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	83.96	578.28	632.33	14.5	13.3	8.8	8.0	10%	13%	1.8%	1.9%	39955.1	41932.3	5984.2	6484.6	8248.4	8844.3
CVC	6440.00	437.49	511.23	11.0	12.8	5.3	7.6	12%	9%	4.5%	3.5%	15441.9	18336.2	494.4	563.5	779.3	807.0
Dapco	1643.50	1.65	1.68	13.9	13.0	11.3	10.5	8%	6%	2.2%	2.7%	19543.0	18729.9	5951.2	5851.2	6614.0	6334.0
Dole	12.90	129.66	139.84	9.9	9.2	5.3	4.8	10%	14%	2.5%	2.7%	9724.1	9837.0	261.9	270.8	398.9	410.1
easyJet	670.00	8.17	18.19	82.0	36.8	5.7	5.0	nm	nm	2.3%	2.5%	10599.5	11668.6	60.3	235.6	919.7	1255.2
Ennais	446.10	56.52	69.61	7.9	6.4	6.9	6.4	9%	13%	4.6%	4.5%	5106.5	5307.3	675.8	779.2	957.4	1019.1
Evolve	43.25	17.65	FALSE	2.5	FALSE	4.5	FALSE	55%	FALSE	0.0%	FALSE	1929.0	FALSE	267.3	FALSE	397.2	FALSE
FBD Holdings	18.55	1.47	1.57	12.6	11.8	1.4	1.4										
Fever-Tree Drinks	845.00	29.41	40.57	28.7	20.8	16.8	12.8	4%	6%	2.2%	2.3%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	81.89	4.92	7.08	15.6	11.6	9.7	7.7	4%	7%	0.0%	0.0%	17842.4	19245.8	1841.7	2386.3	2572.2	3156.1
Forterra	137.00	10.46	11.91	13.1	11.5	7.2	6.1	10%	11%	3.8%	4.3%	369.7	391.4	33.8	38.1	54.1	59.6
Fuller, Smith & Turner	690.00	47.18	52.77	13.3	13.2	7.3	7.7	7%	6%	3.4%	3.3%	397.8	413.3	40.8	48.3	74.6	77.7
Glanbia	22.65	1.61	1.76	14.0	12.8	10.4	9.3	6%	7%	2.1%	2.3%	4223.7	4441.5	435.7	472.9	553.9	590.3
Glanvagh Properties	2.37	0.21	0.23	11.2	10.4	8.4	7.2	15%	10%	0.0%	0.0%	1074.4	1132.6	141.5	149.0	145.3	152.9
Grafton Group	959.90	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	0.76	0.05	FALSE	14.9	FALSE	20.7	FALSE	17%	FALSE	9.0%	FALSE	30.0	FALSE	100.7	FALSE	66.7	FALSE
Greencore	245.20	20.07	24.02	12.2	10.2	7.9	5.8	9%	11%	1.2%	2.0%	3374.4	4091.1	191.2	248.5	336.3	429.9
Group	1789.00	126.55	127.20	14.1	14.1	6.0	5.6	5%	7%	3.9%	3.9%	2283.1	2407.4	192.7	198.4	377.1	399.5
Hammerman	347.00	23.24	25.54	15.0	13.6	9.0	8.0	3%	4%	5.1%	5.4%	227.4	241.5	180.0	203.2	188.8	203.1
Hastellens Materials	143.10	12.79	14.44	11.2	9.9	7.2	6.5	10%	10%	2.8%	3.0%	22179.1	23585.4	3478.8	3856.3	4850.8	5280.2
Hostelworld Group	102.50	0.13	0.18	9.3	6.7	6.0	4.1	13%	20%	0.0%	0.0%	104.3	115.1	11.0	14.6	22.7	26.9
Howden Joinery	756.00	52.56	56.26	14.4	13.4	8.6	7.9	6%	7%	3.0%	3.2%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	428.20	0.61	0.77	8.2	6.5	4.0	3.6	11%	10%	2.1%	2.3%	33801.5	35574.1	4244.1	4903.0	6855.6	7655.9
Ibstock	73.20	-3.63	5.35	nm	13.7	7.7	6.5	10%	9%	1.5%	3.7%	368.8	390.7	14.5	37.1	58.8	68.3
ICI	7.94																
IBES BEIT	1.06	0.16	0.15	6.8	7.0	0.7	0.7	3%	3%	5.1%	5.6%	68.2	72.7	105.0	104.9	102.4	102.4
I D Wetherston	807.00	39.18	48.69	20.6	16.6	8.4	8.0	11%	7%	1.5%	1.5%	2222.7	3224.0	129.9	131.3	235.9	246.8
Jet2	1371.00	190.52	113.44	7.2	12.1	0.9	2.0	22%	nm	1.3%	1.3%	7618.1	8026.6	437.5	226.8	777.1	618.5
Kerry Group	85.35	5.14	5.71	16.6	15.0	12.5	11.2	5%	5%	1.8%	2.0%	6861.7	7234.1	952.5	1039.6	1265.9	1357.5
Kingfisher	328.20	23.42	25.14	12.1	13.0	5.3	5.4	10%	8%	4.4%	3.8%	12845.0	12829.6	651.0	687.4	1327.0	1353.7
Kingspan	96.25	4.40	5.73	21.9	16.8	14.5	11.2	3%	4%	0.6%	0.7%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	26.59	0.00	2.23	nm	11.9	8.7	8.1	6%	9%	2.2%	2.6%	2411.0	2578.1	767.7	846.3	965.5	1055.3
Lufthansa	7.57	0.97	1.07	7.8	7.1	7.9	7.5	23%	17%	3.8%	4.3%	42165.6	42688.5	1640.1	1942.4	2981.2	3180.3
Marston's	45.80	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	275.00	31.43	33.14	8.7	8.3	6.1	5.7	5%	5%	0.0%	0.0%	2796.4	2886.3	331.2	360.0	470.4	483.3
Morrell	814.60	0.51	0.63	18.7	14.9	8.9	7.2	nm	3%	3.9%	3.3%	8402.7	8758.3	365.8	543.3	860.1	1084.3
Origin Enterprises	4.03	0.54	0.55	7.5	7.3	5.2	4.8	nm	13%	4.5%	4.7%	2166.0	2268.3	86.3	87.5	118.2	121.3
Permanent TSB	2.95	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	1148.50	99.27	99.14	11.6	11.6	1.0	1.0	nm	5%	3.5%	3.7%	4127.6	4344.5	485.1	489.5	509.4	517.1
Playtech	387.20	0.37	0.31	12.1	14.6	1.0	0.9	7%	6%	0.0%	0.0%	823.2	857.2	174.9	153.2	276.6	259.9
Rank Group	75.80	9.81	10.33	7.7	7.3	4.1	3.8	5%	10%	3.9%	4.4%	852.6	919.9	67.6	71.2	123.4	129.6
Ryanair	22.72	2.12	1.72	11.9	13.2	6.5	6.5	6%	5%	1.7%	2.1%	15544.3	15876.0	2459.2	1983.3	3832.6	3543.4
Sainsbury's	46.00	3.06	3.22	22.4	14.3	7.4	6.3	6%	7%	3.0%	4.3%	32928.6	34602.3	2193.5	2952.5	5076.6	5814.9
S&P Group	183.20	13.90	16.67	13.2	11.0	6.6	6.2	5%	6%	2.7%	3.2%	3025.4	3973.6	292.7	330.2	635.0	677.8
Tate & Lyle	559.00	40.50	36.60	11.2	15.3	7.4	8.6	8%	7%	4.4%	3.5%	2006.0	2005.1	287.0	267.5	415.0	400.7
Taylor Wimpey	78.80	5.25	5.52	15.0	14.3	0.7	0.7	4%	2%	3.0%	3.4%	3871.8	4095.9	287.9	296.1	294.2	303.7
Travis Perkins	597.00	27.94	33.49	21.4	17.8	6.9	6.3	7%	7%	2.0%	2.3%	4520.8	4628.6	116.2	132.9	267.6	289.7
Uniphar	3.94	0.27	0.28	14.5	14.1	8.9	6.5	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Viatry Group	259.60	43.09	49.03	6.0	5.3	2.2	1.5	43%	28%	0.0%	0.0%	3784.1	3942.4	276.8	290.5	348.2	397.2
Wii Smith	360.60	39.84	36.41	9.1	9.9	5.2	5.0	nm	3%	0.0%	0.0%	1627.2	1634.1	107.9	112.0	162.4	165.9
Whitbread	328.00																
Winkles Group	198.80	30.98	24.54	9.5	8.1	5.1	4.5	4%	9%	6.0%	7.0%	1684.9	1766.1	81.1	90.0	292.5	219.5
Wizz Air	1024.00	0.01	-3.47	1426.2	nm	8.0	6.6	47%	34%	0.0%	0.0%	5691.4	6585.3	139.7	-350.3	1318.3	1013.6

Closing prices as of: 24/09/2026