Goodbody Market Commentary Metrics

Goodbody

26 November 2026																	
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
Company	lc	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027	2026	2027
AIB Group	10.49	0.89	0.98	11.8	10.7	1.6	1.5			5.1%	5.6%	4676.2	4864.6	2314.4	2455.8		
Air France-KLM	14.27	4.39	5.35	3.3	2.7	3.4	3.3	61%	56%	0.0%	0.0%	35462.1	37651.5	2016.4	2160.1	5109.8	5424.5
Applied Nutrition	297.00	12.46	13.79	23.8	21.5	16.7	14.4	1%	2%	0.0%	0.0%	160.4	205.3	41.8	46.0	43.4	49.2
B&M European Value Re	343.80	22.22	23.26	10.2	14.8	6.5	8.5	12%	6%	4.2%	3.0%	5775.0	6006.1	359.0	374.1	458.0	478.9
Bank of Ireland	17.68	1.62	1.85	10.9	9.6	1.3	1.2			4.5%	5.2%	4419.1	4656.0	1887.0	2063.0		
Barclays	391.15	53.36	63.08	7.3	6.2	0.7	0.6			8.7%	11.2%	31357.3	32923.4	10457.4	11942.4		
Barratt Redrow	302.70	26.43	23.68	13.0	12.8	0.6	0.5	9%	2%	1.7%	1.0%	6055.0	6032.3	556.5	458.7	569.1	477.6
Beauty Tech Group	468.00	26.78	31.87	17.5	14.7	9.6	8.3	6%	9%	0.0%	0.0%	171.6	193.3	36.4	41.6	49.1	55.1
Bellway	2204.00	182.89	136.40	12.8	16.2	0.8	0.7	12%	0%	3.6%	3.3%	3162.2	3016.6	320.0	242.2	326.5	245.7
Berkeley Group	3438.00	330.87	266.33	11.7	12.9	1.0	0.9	8%	7%	3.1%	1.9%	2383.3	2053.5	449.8	352.1	446.8	348.1
Breedon Group	309.40	33.10	35.24	9.3	8.8	6.0	5.6	11%	10%	5.1%	5.1%	1790.1	1883.9	148.7	155.9	272.5	284.9
C & C Group	107.60	0.10	0.10	16.6	12.7	8.9	7.7	0%	5%	3.4%	4.7%	1569.8	1534.9	70.5	70.8	104.3	104.6
Cairn Homes	2.80	0.24	0.26	11.9	10.6	8.4	7.8	6%	6%	4.1%	4.5%	1080.5	1207.4	185.0	200.4	187.2	203.1
Coca-Cola HBC	4326.00	2.91	3.18	17.7	16.2	11.9	9.3	3%	3%	2.5%	2.7%	12502.8	16751.0	1494.6	1883.4	1908.0	2437.1
Compass Group	35.79	1.48	1.60	21.1	22.4	11.1	12.3	5%	4%	2.4%	2.2%	50848.0	53895.3	3746.0	4039.8	5248.0	5486.7
Cranswick	5060.00	301.74	322.29	17.0	15.7	8.9	7.8	3%	3%	2.2%	2.3%	2982.5	3129.0	232.8	250.8	336.4	358.8
CRH	97.30	491.11	577.20	19.8	16.9	11.3	10.2	9%	11%	1.6%	1.7%	39298.3	42730.2	5629.1	6171.9	7850.0	8689.0
DCC	6460.00	437.42	511.23	11.0	12.6	6.3	7.6	12%	9%	4.5%	3.5%	15441.9	16336.2	494.4	563.5	778.3	807.0
Diageo	1934.00	1.65	1.63	13.9	15.5	11.3	11.9	8%	5%	2.2%	2.3%	19643.0	18217.6	5901.0	5748.9	6674.0	6212.3
Dole	12.76	118.69	132.44	10.8	9.6	5.4	5.0	9%	12%	2.3%	2.6%	9643.3	9949.3	246.5	260.4	383.5	399.7
easyJet	689.00	8.17	18.19	84.4	37.9	5.8	5.2	nm	nm	2.2%	2.5%	10599.5	11668.6	60.2	235.6	919.7	1255.2
Entain	445.10	56.06	63.78	7.9	7.0	6.9	6.4	9%	13%	4.6%	4.9%	5121.6	5318.1	666.9	735.3	956.9	1010.6
Evoke	46.15	17.65	FALSE	2.6	FALSE	4.5	FALSE	52%	FALSE	0.0%	FALSE	1929.0	FALSE	267.2	FALSE	397.2	FALSE
FBD Holdings	19.25	1.47	1.57	13.1	12.3	1.5	1.5										
Fever-Tree Drinks	940.00	29.41	40.57	32.0	23.2	18.8	14.4	4%	6%	1.9%	2.0%	402.6	440.9	36.8	51.9	50.3	65.8
Flutter Entertainment	70.76	3.94	5.65	18.0	12.5	9.2	7.8	4%	8%	0.0%	0.0%	17610.7	18997.5	1760.7	2068.6	2490.7	2828.5
Forterra	148.20	9.07	10.77	16.3	13.8	8.6	7.5	3%	9%	3.1%	3.6%	340.4	360.3	29.6	34.7	50.0	55.2
Fuller, Smith & Turner	894.00	47.18	56.21	13.3	15.9	7.3	9.2	7%	5%	3.4%	2.8%	397.8	428.3	40.8	52.9	74.6	85.0
Glanbia	18.20	1.66	1.79	11.0	10.2	8.2	7.6	7%	8%	2.6%	2.9%	4229.5	4452.4	447.9	479.7	566.1	598.7
Glenveagh Properties	2.38	0.21	0.24	11.3	10.1	13.0	11.8	10%	10%	0.0%	0.0%	1082.0	1146.5	147.8	151.6	151.6	155.6
Grafton Group	1005.20	74.47	84.04	13.5	12.0	6.6	6.0	5%	8%	3.8%	3.9%	2696.2	2840.8	169.7	182.9	333.7	350.9
Greencoat Renewables	0.78	0.05	FALSE	15.3	FALSE	20.9	FALSE	17%	FALSE	8.8%	FALSE	30.0	FALSE	100.7	FALSE	96.7	FALSE
Greencore	290.00	21.86	25.57	13.3	11.3	8.8	6.7	11%	10%	1.0%	1.8%	3378.1	4142.6	203.1	256.0	348.1	437.5
Greggs	2326.00	130.24	128.16	17.9	18.1	7.3	6.9	4%	5%	3.0%	3.0%	2303.8	2441.5	202.8	199.9	382.2	401.3
Hammerson	340.00	23.21	25.54	14.7	13.3	0.9	0.9	3%	5%	5.2%	5.6%	227.4	247.5	190.0	203.2	188.6	203.1
Heidelberg Materials	181.55	12.79	14.44	14.2	12.6	8.6	7.7	8%	8%	2.2%	2.4%	22179.1	23585.4	3476.8	3856.3	4850.8	5280.2
Hostelworld Group	88.00	0.13	0.15	8.3	6.9	5.7	4.8	13%	16%	0.0%	0.0%	103.2	108.4	9.3	11.0	20.5	21.8
Howden Joinery	808.00	52.56	56.26	15.4	14.4	9.2	8.4	6%	6%	2.8%	3.0%	2574.3	2735.6	390.3	423.3	553.2	598.3
IAG	436.80	0.60	0.68	8.7	7.7	4.1	3.9	12%	10%	2.0%	2.2%	34189.8	37293.8	4098.7	4344.5	6699.7	7079.0
Ibstock	71.80	-6.20	2.16	nm	33.3	10.5	9.7	6%	3%	0.7%	0.0%	334.7	355.3	-0.3	19.0	44.1	47.5
ICG	7.96																
IRES REIT	1.36	0.16	0.15	8.7	9.0	1.0	0.9	2%	2%	4.0%	4.3%	68.2	72.7	105.0	104.9	102.4	102.4
J D Wetherspoon	1016.00	39.83	52.88	17.0	19.2	7.6	8.4	15%	7%	1.8%	1.2%	2238.0	2416.9	120.2	137.1	240.1	257.5
Jet2	1264.00	208.16	132.15	7.0	9.6	1.1	1.5	19%	nm	1.1%	1.5%	7482.1	7927.3	439.6	219.3	732.5	554.0
Kerry Group	104.00	5.18	5.80	20.1	17.9	14.8	13.5	4%	4%	1.5%	1.6%	6908.1	7365.3	956.2	1059.1	1269.6	1377.1
Kingfisher	374.30	23.42	26.27	12.1	14.2	5.3	5.9	10%	8%	4.4%	3.3%	12945.0	13088.1	651.0	711.9	1327.0	1373.3
Kingspan	87.00	4.40	5.73	19.8	15.2	13.3	10.3	3%	5%	0.7%	0.8%	10411.9	12311.4	1062.1	1356.0	1419.1	1780.0
Lottomatica Group	25.74	1.79	2.21	14.4	11.7	8.8	8.0	6%	9%	2.2%	2.7%	2371.9	2558.5	741.7	838.4	936.9	1046.0
Lufthansa	8.69	1.08	1.01	8.1	8.6	8.2	8.2	20%	15%	3.7%	3.5%	42420.4	45595.1	1804.0	1841.0	3010.1	3085.7
Lloyds Banking Group	93.60	10.11	12.03	9.3	7.8	1.1	1.0			4.9%	5.3%	20089.7	21723.2	8793.4	9967.1		
Marston's	49.50	9.74	10.27	5.1	4.8	7.0	6.7	15%	14%	0.0%	0.0%	887.4	900.4	166.2	171.2	211.7	216.6
Mitchells & Butlers	307.00	31.43	33.14	9.8	9.3	6.5	6.1	4%	5%	0.0%	0.0%	2792.4	2888.1	331.2	340.0	470.4	483.3
Mondi	774.40	0.23	0.55	40.3	16.8	9.7	7.7	nm	2%	1.9%	3.0%	8221.5	8606.0	306.9	491.0	786.5	984.3
NatWest Group	574.20	75.88	82.51	7.6	7.0	0.8	0.8			6.6%	6.6%	18210.7	19436.5	8574.9	9230.8		
Origin Enterprises	4.06	0.54	0.55	7.7	7.4	5.5	5.3	4%	8%	4.2%	4.5%	2118.2	2203.1	88.9	90.0	121.8	126.4
Permanent TSB	2.97	0.23	0.27	13.2	10.9	0.7	0.7			2.4%	4.0%	708.5	762.2	191.4	219.9		
Persimmon	1226.50	100.38	99.07	12.2	12.4	1.0	1.0	0%	5%	3.3%	3.4%	4133.7	4340.7	490.1	489.1	514.4	516.7
Playtech	340.00	0.43	0.31	9.4	13.3	0.9	0.8	9%	7%	0.0%	0.0%	843.7	856.2	199.3	152.1	301.0	258.8
Rank Group	80.70	11.15	8.97	10.1	9.0	4.9	4.1	2%	5%	3.1%	3.6%	834.4	881.7	78.0	69.3	137.7	131.7
Ryanair	25.11	2.12	1.61	11.9	15.6	6.5	7.6	6%	3%	1.7%	1.8%	15544.3	15856.5	2459.2	1855.6	3832.6	3415.6
Smurfit Westrock	41.65	1.60	2.80	26.0	14.9	7.5	6.2	5%	11%	4.4%	4.7%	32233.2	34386.8	1859.3	2661.8	4736.9	5523.5
SSP Group	180.60	13.95	16.06	12.9	11.2	6.6	6.5	3%	5%	2.8%	3.1%	3816.7	3930.1	288.6	317.2	625.1	652.2
Tate & Lyle	553.50	40.50	34.68	11.2	16.0	7.4	8.9	6%	5%	4.4%	3.6%	2006.0	2039.5	287.0	256.3	415.0	389.5
Taylor Wimpey	74.80	4.84	5.10	15.5	14.7	0.7	0.6	6%	2%	3.2%	3.6%	3743.9	3960.6	267.3	274.7	273.6	282.3
Travis Perkins	619.00	31.24	32.64	19.8	19.0	6.9	6.8	6%	3%	1.9%	2.3%	4390.6	4432.5	126.4	130.2	272.8	278.8
Uniphar	4.16	0.27	0.28	15.4	14.9	9.3	6.8	nm	6%	0.5%	0.5%	3214.9	3361.7	110.7	115.5	148.3	165.7
Vistry Group	193.50	27.44	34.46	7.1	5.6	0.8	0.8	124%	100%	0.0%	5.2%	3999.4	3186.7	193.8	235.2	907.5	739.1
WH Smith	349.20	30.30	26.40	19.0	13.2	4.7	5.5	0%	3%	0.0%	0.0%	1625.0	1588.4	106.0	103.7	238.0	156.1
Whitbread	2780.00																
Wickes Group	238.50	21.03	24.54	11.3	9.7	5.6	5.0	3%	8%	4.6%	5.0%	1684.9	1766.1	81.1	90.0	203.4	219.4
Wizz Air	1151.00	0.01	-4.18	1426.2	nm	8.0	7.1	47%	25%	0.0%	0.0%	5691.4	6496.2	139.7	-450.8	1318.3	998.2

Closing prices as of: *25/11/2026*