

Goodbody Market Commentary Metrics



April 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	5.71	0.75	0.78	7.6	7.3	0.8	0.8			6.7%	7.3%	4433.5	4399.4	2114.3	2022.1		
Air France-KLM	7.66	4.85	5.80	1.6	1.3	3.3	2.9	82%	129%	0.0%	0.0%	33240.2	34581.3	1903.6	2176.4	4701.4	5070.7
Applied Nutrition	115.00	8.57	9.66	13.4	11.9	9.4	7.8	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6
B&M European Val	327.90	35.25	35.85	9.3	9.1	6.9	6.8	9%	10%	4.8%	4.9%	5572.0	5893.6	537.2	547.6	620.5	634.5
Bank of Ireland	10.38	1.24	1.46	8.3	7.1	0.8	0.7			6.2%	6.7%	4023.1	4117.0	1670.9	1740.2		
Bakkavor Group	171.00																
Barratt Redrow	452.30	30.44	34.82	14.9	13.0	0.8	0.8	6%	12%	3.5%	3.8%	5559.7	6075.9	601.6	720.8	614.4	726.6
Bellway	2562.00	160.68	191.29	15.9	13.4	0.8	0.8	4%	6%	2.5%	3.1%	2700.1	2972.6	287.6	335.4	293.7	335.5
Berkeley Group	4010.00	285.85	292.86	14.0	13.7	1.2	1.2	8%	6%	6.5%	6.5%	2383.5	2452.6	467.1	478.8	443.8	455.8
Breedon Group	448.20	36.60	42.29	12.2	10.6	6.3	5.3	6%	11%	3.4%	3.6%	1862.4	1997.3	185.8	211.4	309.6	343.0
Bytes Technology	496.60	19.85	22.25	25.0	22.3	15.8	13.6	5%	6%	4.8%	5.4%	228.1	251.2	63.8	71.5	66.2	74.1
C & C Group	134.40	0.11	0.12	14.0	13.0	8.0	8.0	5%	6%	3.9%	4.2%	1666.3	1707.4	76.9	79.4	110.9	113.4
Cairn Homes	1.87	0.20	0.22	9.2	8.6	5.8	6.0	4%	16%	4.8%	5.3%	961.1	1007.4	160.4	166.5	164.8	171.5
Ceres Power	59.75	-8.62	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE
Coca-Cola HBC	3798.00	2.56	2.78	17.4	16.0	10.5	9.7	4%	4%	2.6%	2.9%	11654.6	12355.2	1321.6	1427.8	1739.7	1858.6
Compass Group	2459.00	1.27	1.39	25.7	23.6	14.9	14.1	3%	3%	1.9%	2.1%	44276.1	46981.4	3212.6	3446.7	4253.3	4511.0
Cranswick	5140.00	266.23	281.61	19.3	18.3	9.4	8.8	4%	4%	1.7%	1.8%	2721.5	2849.8	195.8	206.6	282.2	293.1
CRH	92.44	571.88	639.76	16.2	14.4	9.8	9.1	10%	11%	1.6%	1.7%	37929.8	39857.8	5726.1	6204.3	7613.0	8205.2
Dalata Hotel Group	5.20	0.37	0.36	14.2	14.5	8.7	8.7	7%	7%	2.7%	2.9%	664.9	671.1	167.5	164.9	241.8	239.8
Datalux	0.40	-0.01	0.00	nm	508.1	278.0	30.3	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7
DCC	4792.00	477.33	465.63	10.0	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	20.25	1.30	1.72	20.7	15.7	4.2	3.5	10%	11%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	2065.00	1.64	1.69	16.8	16.3	13.4	13.0	5%	5%	3.8%	3.8%	20079.9	20459.9	5925.2	6083.1	6358.9	6485.9
Dole	14.80	133.38	144.45	11.1	10.2	5.4	5.0	6%	9%	2.3%	2.5%	8465.5	8637.2	273.5	286.2	380.1	392.8
easyJet	489.00	75.89	81.77	6.4	6.0	2.0	1.8	19%	12%	2.9%	3.2%	10339.5	10922.0	800.9	861.5	1635.0	1762.6
Entrain	588.20	45.45	66.86	12.9	8.8	7.1	6.6	7%	9%	3.3%	3.5%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	47.65	11.35	12.65	4.2	2.7	5.3	4.5	35%	50%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	13.60	1.66	FALSE	8.2	FALSE	1.2	FALSE			9.2%	FALSE	422.9	FALSE	56.6	FALSE		
Ferguson	12660.00																
Fever-Tree Drinks	766.00	24.15	29.72	31.7	25.8	17.3	15.2	4%	4%	2.3%	2.4%	374.5	412.0	30.9	37.0	44.9	52.0
FD Technologies	1738.00	-57.35	42.11	nm	41.3	23.9	13.5	nm	nm	0.0%	0.0%	164.1	96.8	-4.3	11.0	17.9	29.6
Flutter Entertainment	229.84	9.08	13.07	25.3	17.6	14.4	11.0	4%	6%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5
Forterra	182.00	12.86	17.33	14.1	10.5	7.5	6.0	8%	8%	3.6%	5.0%	363.7	392.5	41.0	52.6	62.3	74.7
Frontier Developm	189.60	587.49	849.11	0.3	0.2	1.9	2.6	7%	nm	0.0%	0.0%	90.1	96.7	5.2	-5.4	37.9	28.4
Fuller, Smith & Tu	560.00	30.21	34.76	18.5	16.1	8.2	7.7	1%	4%	3.5%	3.7%	374.6	396.6	49.3	41.0	65.8	69.8
Games Workshop	15120.00	542.36	571.01	27.9	26.5	17.5	16.4	4%	4%	3.1%	3.2%	601.2	641.3	236.7	248.7	277.8	294.1
Glanbia	11.36	1.27	1.42	9.0	8.0	7.1	6.2	10%	12%	4.4%	4.4%	3836.5	3938.2	343.8	381.9	491.1	530.6
Glenveagh Proper	1.65	0.19	0.21	8.5	7.9	9.7	8.3	8%	17%	0.0%	0.0%	1005.2	1072.3	141.8	148.0	145.0	151.4
Grafton Group	888.90	69.87	77.31	12.7	11.5	6.1	5.6	5%	7%	4.3%	4.5%	2501.5	2592.6	159.3	176.0	309.3	330.0
Greencore 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	179.40																
Greggs	1815.00	139.34	146.38	13.0	12.4	6.2	5.7	nm	4%	3.8%	4.0%	2189.2	2375.6	204.4	218.0	368.7	403.3
Hammerson	250.40																
Heidelberg Mater	172.75	10.42	FALSE	16.6	FALSE	9.1	FALSE	5%	FALSE	1.4%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	112.00	0.17	0.20	7.7	6.4	5.5	4.0	13%	15%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1
Howden Joinery	722.00	46.31	51.01	15.6	14.2	8.6	8.2	6%	6%	3.3%	3.8%	2346.0	2433.2	341.3	367.9	499.6	529.3
IAG	265.60	0.56	0.66	5.5	4.7	2.6	2.3	16%	23%	3.9%	4.8%	33108.3	34316.8	4350.3	4641.9	6969.7	7495.9
Ibstock	176.00	11.00	13.41	16.0	13.1	8.9	7.6	7%	6%	3.1%	4.0%	424.5	456.0	64.9	77.6	95.7	109.6
ICG	5.05	0.38	0.41	13.3	12.2	6.6	5.9	13%	6%	3.2%	3.4%	641.4	661.0	74.0	79.5	143.0	148.5
IBES REIT	1.03	0.14	FALSE	7.5	FALSE	66.8	0.0	4%	FALSE	5.4%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE
ITM Power	32.45	-5.68	-5.22	nm	nm	nm	nm	nm	nm	0.0%	0.0%	22.0	53.6	-43.9	-40.0	-36.1	-30.2
J.D. Wetherspoon	631.00	50.30	56.36	12.5	11.2	7.7	7.3	3%	5%	1.9%	1.9%	2117.8	2229.4	141.4	150.1	249.6	258.8
Jet2	1377.00	181.26	183.73	7.6	7.5	1.0	0.6	22%	14%	0.3%	1.4%	7366.6	8055.8	469.5	494.7	749.2	825.5
Johnson Matthey	1256.00	170.95	183.63	7.3	6.8	5.2	4.7	6%	14%	6.4%	6.8%	4033.1	3967.9	467.6	501.7	611.7	656.1
Kainos Group	700.50	30.50	36.18	23.0	19.4	13.5	11.3	6%	7%	3.5%	3.5%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	91.45	5.10	5.62	17.9	16.3	13.6	12.3	4%	5%	1.5%	1.7%	7229.2	7518.5	980.3	1074.1	1283.1	1379.2
Kingfisher	270.90	20.31	21.55	13.3	12.6	6.1	5.7	9%	8%	4.6%	4.6%	12801.3	13298.6	622.2	661.3	1319.3	1389.5
Kingspan	74.50	4.00	4.45	18.6	16.7	12.1	10.8	5%	5%	0.8%	0.8%	9383.0	9901.4	929.8	1023.9	1234.8	1340.9
Lufthansa	6.48	1.10	1.28	5.9	5.0	6.6	6.0	22%	22%	4.6%	4.6%	39742.1	41591.8	1916.4	2187.3	3205.4	3528.9
Marston's	36.85	7.74	8.85	4.8	4.2	7.2	6.6	16%	18%	0.0%	0.0%	927.3	957.2	157.7	166.2	202.3	211.1
Mitchells & Butlers	240.00	28.18	30.39	8.5	7.9	6.1	5.7	8%	6%	0.0%	0.0%	2711.6	2815.9	322.1	334.7	456.3	473.1
Molten Ventures	273.80	48.11	47.64	5.7	5.7	5.2	5.4	13%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	1143.50	1.04	1.36	12.8	9.8	7.5	6.2	4%	11%	4.9%	5.1%	7802.2	8299.0	744.0	928.7	1212.2	1418.3
NCC Group	140.20	5.53	7.09	25.3	19.8	9.4											