

Goodbody Market Commentary Metrics



02 May 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	5.92	0.75	0.78	7.8	7.6	0.9	0.8			6.4%	7.1%	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	116.20	9.66	13.6	12.0	9.5	7.9	4%	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6
BAM European Va	343.20	35.25	35.85	9.7	9.6	7.1	7.1	8%	9%	4.6%	4.7%	5572.0	5893.6	537.2	547.2	620.5	634.5
Bank of Ireland	10.33	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	178.00																
Barratt Redrow	467.70	30.44	34.82	15.4	13.4	0.8	0.8	6%	11%	3.4%	3.6%	5559.7	6075.9	601.6	720.8	614.4	726.6
Bellway	2752.00	160.68	191.29	17.1	14.4	0.9	0.9	4%	5%	2.4%	2.9%	2700.1	2972.6	287.6	335.4	293.7	335.5
Berkeley Group	4198.00	285.85	292.86	14.7	14.3	1.3	1.3	7%	5%	6.2%	6.2%	2383.5	2452.6	467.1	478.8	443.8	455.8
Bresdon Group	438.20	36.60	42.29	12.0	10.4	6.1	5.2	6%	12%	3.5%	3.6%	1862.4	1997.3	185.8	211.4	309.6	343.0
Bytes Technology	521.00	19.85	22.25	26.3	23.4	16.7	14.4	4%	6%	4.5%	5.1%	228.1	251.2	63.8	71.5	66.2	74.1
C & C Group	144.60	0.11	0.12	15.1	14.1	8.5	8.4	4%	5%	3.6%	3.9%	1666.3	1707.4	76.9	79.4	110.9	113.4
Cairn Homes	1.94	0.20	0.22	9.5	8.9	6.1	6.2	4%	15%	4.6%	5.2%	961.1	1007.4	160.4	166.5	164.8	171.5
Ceres Power	58.50	-8.62	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE
Coca-Cola HBC	3830.00	2.56	2.78	17.6	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	2502.00	1.27	1.39	26.1	24.0	15.1	14.3	3%	3%	1.9%	2.1%	44276.1	46981.4	3212.6	3446.7	4253.3	4511.0
Cranwick	5150.00	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	96.28	571.88	639.76	16.8	15.0	10.1	9.4	9%	10%	1.5%	1.6%	37929.8	39857.8	5726.1	6204.3	7613.0	8205.2
Dalata Hotel Group	5.06	0.37	0.36	13.8	14.1	8.6	8.5	7%	7%	2.8%	3.0%	664.9	671.1	167.5	164.9	241.8	239.8
Datalx	0.35	-0.01	0.00	nm	441.2	240.3	26.2	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7
DCC	4878.00	477.33	465.63	10.2	10.5	6.2	6.4	10%	12%	4.2%	4.4%	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	2098.00	1.64	1.69	17.1	16.6	13.5	13.2	5%	5%	3.7%	3.7%	20079.9	20459.9	5925.2	6083.1	6358.9	6485.9
Dole	14.98	133.38	144.45	11.2	10.4	5.4	5.0	6%	9%	2.2%	2.4%	8465.5	8637.2	273.5	286.2	380.1	392.8
easyJet	514.60	77.15	81.67	6.7	6.3	2.1	2.0	18%	12%	2.8%	3.0%	10297.1	10760.1	813.6	860.4	1647.7	1761.5
Entrain	653.00	45.45	66.86	14.4	9.8	7.5	7.0	7%	8%	3.0%	3.2%	5280.4	5459.4	708.9	856.0	1186.4	
Evolve	50.60	11.35	17.65	4.5	2.9	5.4	4.6	33%	47%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	12.90	1.66	FALSE	7.8	FALSE	1.1	FALSE	nm	nm	9.7%	FALSE	472.9	FALSE	56.6	FALSE		
Ferguson	12940.00																
Fever-Tree Drinks	812.00	24.15	29.72	33.6	27.3	18.5	16.2	4%	4%	2.2%	2.3%	374.5	412.0	30.9	37.0	44.9	52.0
FD Technologies	1896.00	-57.35	42.11	nm	45.0	25.8	14.7	nm	nm	0.0%	0.0%	164.1	96.8	-4.3	11.0	17.9	29.6
Flutter Entertain	243.79	9.08	13.07	26.9	18.7	15.1	11.6	4%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5
Forterra	187.40	12.86	17.33	14.6	10.8	7.6	6.2	8%	8%	3.5%	4.8%	363.7	392.5	41.0	52.6	62.3	74.7
Frontier Develop	198.00	587.49	849.11	0.3	0.2	2.0	2.8	7%	nm	0.0%	0.0%	90.1	96.7	5.2	-5.4	37.9	28.4
Fuller, Smith & Tu	582.00	30.21	34.76	19.3	16.7	8.4	7.9	1%	3%	3.4%	3.6%	374.6	396.6	49.3	41.0	65.8	69.8
Games Workshop	15260.00	542.36	571.01	28.1	26.7	17.6	16.6	4%	4%	3.0%	3.2%	601.2	641.3	236.7	248.7	277.8	294.1
Glanbia	12.86	1.27	1.42	10.1	9.1	7.9	7.0	9%	10%	3.0%	3.8%	3836.5	3938.2	343.8	381.9	491.1	530.6
Glenveagh Propert	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	929.80	69.87	77.31	13.3	12.0	6.4	5.9	5%	6%	4.1%	4.3%	2501.5	2592.6	159.3	176.0	309.3	330.0
Greencoast Renewa	0.74	0.14	0.14	5.1	5.1	13.7	15.0	19%	19%	9.6%	10.1%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	185.00																
Greggs	1829.00	139.34	146.38	13.1	12.5	6.3	5.7	nm	4%	3.8%	4.0%	2189.2	2375.6	204.4	218.0	368.7	403.3
Hammons	255.80																
Heidelberg Mater	174.25	10.42	FALSE	16.7	FALSE	9.2	FALSE	5%	FALSE	1.4%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	108.00	0.17	0.20	7.4	6.2	5.3	3.9	14%	15%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1
Howden Joinery	796.50	46.31	51.01	17.2	15.6	9.5	9.0	6%	5%	3.0%	3.5%	2346.0	2433.2	341.3	367.9	499.6	529.3
IAG	265.70	0.56	0.66	5.6	4.7	2.7	2.3	16%	22%	3.8%	4.8%	33108.3	34316.8	4350.3	4641.9	6969.7	7495.9
Ibstock	186.60	11.00	13.41	17.0	13.9	8.0	6%	6%	5%	2.9%	3.8%	424.5	456.0	64.9	77.6	95.7	109.6
ICG	5.13	0.38	0.41	13.5	12.4	6.7	6.0	13%	6%	3.2%	3.3%	641.4	661.0	74.0	79.5	143.0	148.5
IREX REIT	1.02	0.14	FALSE	7.5	FALSE	66.4	0.0	4%	FALSE	5.5%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE
ITM Power	31.05	-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	672.50	50.30	56.36	13.4	11.9	7.9	7.5	3%	5%	1.8%	2.2%	2117.8	2229.4	141.4	150.1	249.6	258.8
Jet2	1655.00	181.26	183.73	9.1	9.0	1.8	1.4	18%	12%	0.3%	1.1%	7366.6	8055.8	469.5	494.7	749.2	825.5
Johnson Matthey	1306.00	170.95	183.63	7.6	7.1	5.3	4.9	5%	14%	6.2%	6.9%	4033.1	3967.9	462.6	501.7	611.7	656.1
Kainos Group	749.00	30.50	36.18	24.6	20.7	14.6	12.2	6%	7%	3.3%	3.3%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	93.25	5.10	5.62	18.3	16.3	13.9	12.6	4%	5%	1.5%	1.6%	7229.2	7518.5	980.3	1074.1	1379.2	
Kingfisher	291.90	20.31	21.55	14.4	13.5	6.5	6.0	8%	7%	4.2%	4.2%	12801.3	13298.6	622.2	661.3	1319.3	1389.5
Kingspan	74.30	4.00	4.45	18.6	16.7	12.0	10.7	5%	5%	0.8%	0.8%	9383.0	9901.4	929.8	1023.9	1234.8	1340.9
Lufthansa	6.32	1.10	1.28	5.8	4.9	6.6	6.0	22%	23%	4.7%	4.7%	39742.1	41591.8	1916.4	2187.3	3205.4	3528.9
Marston's	36.45	7.74	8.85	4.7	4.1	7.2	6.6	16%	19%	0.0%	0.0%	927.3	1577.7	166.2	202.3	211.1	
Mitchells & Butlers	261.00	28.18	30.39	9.3	8.6	6.3	5.9	7%	6%	0.0%	0.0%	2711.6	2815.9	322.1	334.7	456.3	473.1
Molten Ventures	266.00	48.11	47.64	5.5	5.6	5.0	5.3	13%	0%	0.0%	0.0%	126.5	96.9	96.9	96.2	96.9	96.3
Mondi	1131.50	1.04	1.36	12.8	9.8	7.4	6.2	4%	11%	4.9%	5.1%	7802.2	8299.0	744.0	928.7	1212.2	1418.3
NCC Group	146.80	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	3.52	0.52	0.57	6.8	6.2	6.0	5.8	nm	10%	4.9%	5.1%	2189.6	2252.6	78.9	83.8	110.8	117.3
Permanent TSB	1.55	0.12	0.22	13.2	7.0	0.4	0.3			1.3%	5.8%	654.2	694.6	146.4	173.2		
Persimmon	1332.00	93.72	111.41	14.2	12.0	1.2	1.1	4%	7%	3.0%	3.0%	3456.4	3755.4	438.9	516.7	461.6	541.5
Playtech	774.00																
Rank Group	84.70	7.76	8.63	10.9	9.8	5.0	4.7	1%	2%	1.5%	1.7%	782.2	818.7	55.7	60.7	105.7	112.1
Ryanair	20.78	1.46	1.96	14.3	10.6	7.6	5.7	7%	9%	1.9%	2.0%	13981.4	14685.8	1619.8	2222.9	2868.1	3540.1
SLG	15.90																
Smurfit Westrock	41.67	2.76	3.70	15.1	11.3	6.8	5.8	7%	8%	3.5%	4.1%	32739.6	34883.1	2521.9	3090.6	5082.3	5827.1
SSP Group	150.70	11.82	13.65	12.8	11.0	6.2	6.1	nm	nm	2.8%	3.2%	3671.2	3861.4	275.8	299.9	629.2	650.4
Tate & Lyle	557.00	48.82	49.43	11.4	10.3	7.7	6%	6%	5%	3.6%	3.3%	1754.2	2185.7	280.9	345.8	373.2	490.1
Taylor Wimpey	120.00	8.46	9.69	14.2	12.4	1.0	1.0	4%	7%	7.9%	8.3%	3679.2	3922.2	442.5	506.6	450.0	513.2
Everplay Group	260.00	24.51	24.93	10.6	10.4	3.9	3.5	6%	6%	0.0%	0.0%	169.7	173.9	32.2			