

Goodbody Market Commentary Metrics



30 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				
AIB Group	6.88	0.75	0.78	9.1	8.8	1.0	0.9			5.5%	6.1%	4433.5	4399.4	2114.3	2022.1				
Air France-KLM	9.51	4.80	5.60	2.0	1.7	3.4	3.1	66%	102%	0.0%	0.0%	33158.0	34514.6	1888.0	2114.7	4685.1	5008.0		
Applied Nutrition	131.40	8.57	9.66	15.3	13.6	10.8	9.1	4%	5%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6		
B&M European Val	338.30	35.25	35.85	9.6	9.4	7.1	7.0	8%	9%	4.7%	4.8%	5572.0	5893.6	537.2	547.6	620.5	634.5		
Bank of Ireland	12.13	1.24	1.46	9.8	8.3	0.9	0.8			5.3%	5.7%	4023.1	4117.0	1670.9	1740.2				
Bakkavor Group	207.00																		
Barratt Redrow	463.00	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	2708.00	158.68	189.99	17.1	14.3	0.9	0.9	3%	4%	2.4%	3.0%	2699.4	2998.0	290.1	337.0	296.2	337.1		
Berkeley Group	4220.00	285.85	292.86	14.8	14.4	1.3	1.3	7%	5%	6.2%	6.2%	2383.5	2452.6	467.1	478.8	443.8	455.8		
Breedon Group	459.40	36.60	42.29	12.6	10.9	6.4	5.4	5%	11%	3.3%	3.5%	1862.4	1997.3	185.8	211.4	309.6	343.0		
Bytes Technology	523.00	25.75	27.00	20.3	19.4	15.3	13.2	5%	6%	6.0%	6.7%	222.1	248.3	72.7	81.7	74.2	83.4		
C & C Group	159.60	0.11	0.12	16.8	15.7	9.1	9.1	4%	5%	3.3%	3.5%	1666.3	1707.4	76.9	79.4	110.9	113.4		
Cairn Homes	2.25	0.20	0.23	11.1	10.0	7.3	7.1	4%	13%	4.0%	4.4%	961.1	1007.4	160.4	171.5	164.8	176.4		
Coca-Cola HBC	3842.00	2.56	2.78	17.8	16.4	10.8	10.0	4%	4%	2.6%	2.9%	11654.6	12355.2	1321.6	1427.8	1739.7	1858.6		
Compass Group	2650.00	1.27	1.39	28.0	25.7	16.2	15.2	3%	3%	1.8%	1.9%	44276.1	46981.4	3212.6	3446.7	4253.3	4511.0		
Cranswick	5260.00	266.23	281.61	19.8	18.7	9.6	9.0	4%	4%	1.7%	1.7%	2721.5	2849.8	195.8	206.6	282.2	293.1		
CRH	91.96	553.35	632.99	16.6	14.5	10.1	9.4	9%	11%	1.6%	1.7%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0		
Dalata Hotel Group	5.68	0.37	0.36	15.5	15.9	9.2	9.1	6%	6%	2.5%	2.6%	664.9	671.1	167.5	164.9	241.8	239.8		
Datalex	0.32	-0.01	0.00	nm	nm	405.8	220.3	24.0	nm	1%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7		
DCC	4614.00	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	20.50	1.30	1.72	21.3	16.1	4.3	3.5	10%	11%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4		
Diageo	2016.00	1.64	1.73	16.6	15.7	13.3	12.7	5%	5%	3.8%	3.8%	20185.2	20900.3	5944.5	6222.9	6402.6	6656.0		
Dole	14.10	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	570.40	76.39	80.78	7.5	7.1	2.3	2.2	17%	10%	2.5%	2.7%	10285.0	10762.9	806.4	851.7	1640.5	1752.8		
Entain	75.10	45.45	66.86	16.6	11.3	8.1	7.5	6%	7%	2.6%	2.7%	5280.4	5450.4	708.9	856.0	1106.1	1186.4		
Evoke	57.10	11.35	17.65	5.0	3.2	5.4	4.6	30%	42%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2		
FBD Holdings	12.95	1.66	FALSE	7.8	FALSE	1.1	FALSE			9.7%	FALSE	422.9	FALSE	56.6	FALSE				
Fever-Tree Drinks	873.00	24.15	29.72	36.1	29.4	20.1	17.6	4%	4%	2.0%	2.1%	374.5	412.0	30.9	37.0	44.9	52.0		
FD Technologies	2445.00																		
Flutter Entertainment	246.95	9.08	13.07	27.2	18.9	15.3	11.7	4%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5		
Forterra	196.00	12.86	17.33	15.2	11.3	7.9	6.4	7%	7%	3.3%	4.6%	363.7	392.5	41.0	52.6	62.3	74.7		
Frontier Developm	249.50	587.49	849.11	0.4	0.3	2.3	1.9	7%	9%	0.0%	0.0%	90.1	96.7	8.2	10.3	40.8	44.1		
Fuller, Smith & Tu	616.00	30.21	34.76	20.4	17.7	8.7	8.2	1%	3%	3.2%	3.4%	374.6	396.6	49.3	41.0	65.8	69.8		
Games Workshop	15400.00	542.36	571.01	28.4	27.0	17.8	16.8	3%	4%	3.0%	3.2%	601.2	641.3	236.7	248.7	277.8	294.1		
Glanbia	14.30	1.27	1.42	11.3	10.1	8.7	7.7	8%	9%	3.1%	3.5%	3836.5	3938.2	343.8	381.9	491.1	530.6		
Glenveagh Proper	1.80	0.20	0.21	9.3	8.6	10.7	9.3	7%	16%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9		
Grafton Group	1008.40	69.84	77.34	14.4	13.0	6.9	6.3	4%	6%	3.8%	4.0%	2510.4	2601.8	159.3	176.0	309.3	330.0		
Greencoat Renewa	0.73	0.14	0.14	5.0	5.1	13.6	14.9	19%	19%	9.7%	10.2%	216.6	215.4	189.2	187.9	189.2	187.9		
Greencore	218.00																		
Greggs	2046.00	139.34	146.38	14.7	14.0	6.9	6.3	nm	4%	3.4%	3.6%	2189.2	2375.6	204.4	218.0	368.7	403.3		
Hammerston	284.00																		
Heidelberg Mater	174.90	10.42	FALSE	16.8	FALSE	9.2	FALSE	5%	FALSE	1.4%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	121.50	0.11	0.15	12.9	9.9	8.2	6.1	9%	11%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0		
Howden Joinery	868.00	46.31	51.01	18.7	17.0	10.3	9.7	5%	5%	2.8%	3.2%	2346.0	2433.2	341.3	367.9	499.6	529.3		
IAG	332.80	0.56	0.66	7.0	6.0	3.1	2.7	12%	18%	3.0%	3.6%	33108.3	34316.8	4350.3	4641.9	6969.7	7495.9		
Ibstock	196.40	11.00	13.41	17.8	14.6	9.7	8.4	6%	5%	2.8%	3.6%	424.5	456.0	64.9	77.6	95.7	109.6		
ICG	5.26	0.38	0.41	13.8	12.8	6.9	6.2	12%	6%	3.1%	3.3%	641.4	661.0	74.0	79.5	143.0	148.5		
IBES REIT	1.08	0.14	FALSE	7.9	FALSE	70.3	0.0	4%	FALSE	5.2%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE		
J.D. Wetherspoon	729.50	50.30	56.36	14.5	12.9	8.2	7.8	2%	4%	1.6%	1.6%	2117.8	2229.4	141.4	150.1	249.6	258.8		
Jet2	1821.00	181.26	183.73	10.0	9.9	2.3	1.8	17%	11%	0.2%	1.0%	7366.6	8055.8	469.5	494.7	749.2	825.5		
Kainos Group	718.00	30.50	36.18	23.5	19.8	13.9	11.6	6%	7%	3.4%	3.4%	365.1	382.2	47.2	56.1	54.1	64.0		
Kerry Group	96.15	5.02	5.56	19.2	17.3	14.7	13.4	4%	4%	1.5%	1.6%	7117.2	7362.4	960.0	1045.0	1262.7	1349.9		
Kingfisher	279.20	20.41	19.65	12.9	14.2	5.5	5.7	10%	8%	4.7%	4.4%	12784.0	12889.1	628.0	608.3	1299.0	1276.0		
Kingspan	76.65	4.00	4.42	19.2	17.3	12.4	11.1	5%	4%	0.7%	0.8%	9375.0	9822.1	927.1	1013.4	1235.1	1333.4		
Lufthansa	7.02	1.07	1.26	6.5	5.6	7.0	6.4	19%	20%	4.3%	4.3%	39742.1	41642.7	1883.1	2153.1	3166.8	3489.1		
Marston's	42.15	7.74	8.85	5.4	4.8	7.3	6.8	14%	16%	0.0%	0.0%	927.3	957.2	157.7	166.2	202.3	211.1		
Mitchells & Butlers	286.00	28.18	30.39	10.1	9.4	6.7	6.3	7%	5%	0.0%	0.0%	2711.6	2815.9	322.1	334.7	456.3	473.1		
Molten Ventures	308.60	48.11	47.64	6.4	6.5	5.9	6.1	11%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3		
Mondi	1207.50	1.04	1.36	13.8	10.5	7.8	6.5	3%	10%	4.5%	4.7%	7802.2	8299.0	744.0	928.7	1212.2	1418.3		
NCC Group	156.80	5.53	7.09	28.3	22.1	10.4	9.1	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	5.6	nm	10%	4.9%	5.1%	2189.6	2252.6	78.9	83.8	110.8	117.3		
Permanent TSB	1.76	0.12	0.22	15.0	7.9	0.4	0.4			1.1%	5.1%	654.2	694.6	146.4	173.2				
Persimmon	1336.00	94.75	110.68	14.1	12.1	1.2	1.1	3%	9%	3.0%	3.0%	3433.1	3730.0	446.6	515.8	468.5	539.7		
Playtech	319.50																		
Rank Group	123.20	7.76	8.63	15.9	14.3	6.7	6.3	1%	2%	1.0%									