

Goodbody Market Commentary Metrics



04 February 2025																				
Company	Price		EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA			
	LC	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026			
ATB Group	5.55	6.70	0.71	8.0	7.8	0.8	0.8	54%	66%	6.0%	6.4%	4367.2	4302.4	2073.5	1959.0					
Air France-KLM	7.85	4.21	5.10	1.9	1.5	2.9	2.6	5%	6%	0.0%	0.0%	33674.5	33941.2	1812.6	2126.4	4695.9	5129.5			
Applied Nutrition	152.60	8.57	9.66	17.8	15.8	12.7	10.7	3%	5%	0.0%	0.0%	99.8	115.9	27.9	31.6	28.9	32.6			
B&M European Value Retail	319.00	36.88	38.77	8.6	8.2	6.6	6.4	9%	10%	5.2%	5.5%	5543.3	5943.5	556.9	587.7	639.8	675.4			
Bank of Ireland	9.30	1.29	1.41	7.2	6.6	0.7	0.6	0%	0%	6.9%	7.3%	4073.9	4145.6	1694.2	1697.7					
Balkavoor Group	135.00	12.29	13.86	10.9	9.7	5.6	5.2	8%	8%	6.0%	6.3%	2326.0	2405.9	118.8	126.6	192.2	202.0			
Barratt Redrow	453.10	28.40	36.45	16.0	15.4	0.8	0.8	5%	7%	3.5%	4.2%	5474.8	6087.1	546.9	746.6	559.7	754.4			
Bellway	2582.00	160.68	195.10	16.1	13.2	0.9	0.8	6%	5%	2.3%	2.7%	2700.1	2939.1	285.9	345.7	293.7	343.8			
Berkeley Group	3828.00	385.85	392.86	13.4	13.1	1.2	1.2	8%	6%	6.9%	6.9%	2383.5	2452.6	467.1	478.8	443.8	453.8			
Bredford Group	429.00	35.17	40.47	13.2	10.6	6.1	5.4	8%	9%	3.5%	3.6%	1806.2	1806.2	180.1	198.9	286.2	312.4			
Bryson Technology	457.60	19.85	22.25	23.1	20.6	14.4	12.4	2%	0%	5.2%	5.8%	226.1	251.2	63.8	71.5	65.2	74.1			
C.B.C Group	143.40	0.12	0.14	14.4	12.0	8.2	7.7	2%	0%	3.6%	4.2%	1678.0	1719.5	80.3	90.1	116.3	124.1			
Cain Homes	2.28	0.20	0.22	11.4	10.5	8.5	8.3	2%	11%	3.7%	4.4%	941.1	1003.3	158.2	164.3	161.0	167.6			
Carac Power	147.30	-8.62	-7.54	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE			
Coca-Cola HBC	2866.00	2.49	2.75	13.9	12.6	8.3	7.6	5%	6%	3.2%	3.6%	11376.7	12059.0	1304.0	1404.9	1755.4	1883.3			
Compass Group	2805.00	1.28	1.40	27.2	24.9	15.7	14.8	2%	3%	1.8%	2.0%	44397.5	47023.1	3226.0	3468.3	4272.5	4533.5			
Convatec Group	242.80	0.17	0.19	17.6	15.7	10.1	9.1	2%	0%	2.2%	2.5%	2361.4	2495.0	517.1	573.9	652.9	705.2			
Currys	4995.00	266.23	281.61	18.8	17.2	8.1	8.6	5%	4%	1.8%	1.8%	2721.5	2846.8	195.8	206.6	282.2	293.1			
CBH	97.24	606.43	681.52	16.1	14.3	10.3	9.6	9%	11%	1.5%	1.5%	37694.8	39606.8	5856.4	6347.0	7611.4	8205.9			
Delta Hotel Group	4.70	0.28	0.40	13.2	11.7	8.0	7.7	7%	9%	3.0%	3.2%	684.2	696.1	175.5	181.5	235.6	250.9			
Datatec	0.26	-0.01	0.00	nm	414.9	225.4	25.6	nm	1%	0.0%	0.0%	30.2	31.2	-3.2	6.1	4.3	2.7			
DCC	5490.00	481.01	500.37	11.4	11.0	6.2	5.7	8%	10%	3.8%	3.8%	20526.6	20873.2	601.7	646.1	963.0	1005.0			
Devolver Digital	22.50	1.20	1.72	21.5	16.2	4.5	3.7	10%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4			
Diageo	2365.00	1.67	1.74	17.6	16.9	13.8	13.4	4%	6%	3.5%	3.7%	20087.8	20642.9	6041.2	6234.1	6363.4	6525.7			
Dole	13.24	140.77	150.95	9.5	8.8	4.8	4.4	11%	12%	2.2%	2.2%	8400.0	8554.3	279.5	287.6	392.8	401.5			
D.S. Smith	582.50	34.45	36.44	16.9	16.0	10.1	9.8	2%	3%	3.2%	3.4%	7445.9	7805.2	604.5	634.6	1072.5	1077.6			
easyJet	506.00	25.87	81.77	6.7	6.2	2.2	2.2	4%	0%	2.8%	3.1%	10135.5	10684.1	759.8	829.8	1561.9	1693.0			
Enam	695.00	53.01	76.20	13.1	9.1	7.5	7.1	7%	8%	2.3%	3.2%	5325.7	770.2	932.4	1131.2	1194.9				
Eusek	69.70	17.12	24.56	4.1	2.8	5.1	4.2	38%	50%	0.0%	0.0%	1883.0	1981.9	255.5	289.6	380.7	419.5			
FBD Holdings	12.90	1.66	FALSE	7.8	FALSE	1.1	FALSE	FALSE	9.7%	FALSE	FALSE	422.9	FALSE	56.6	FALSE					
Ferguson	14670.00																			
Fever-Tree Drinks	773.50	34.07	40.45	22.7	19.1	12.4	10.4	5%	5%	2.4%	2.6%	391.7	417.0	59.4	59.7	63.8	74.0			
FD Technologies	1892.00	-57.35	42.11	nm	44.9	25.8	14.6	nm	nm	0.0%	0.0%	164.1	96.8	-4.3	11.0	17.9	29.6			
Flutter Entertainment	264.59	9.10	11.77	29.1	22.5	15.7	12.3	3%	5%	0.0%	0.0%	15944.4	17678.6	2659.2	3329.8	3219.2	3939.8			
Fofortis	158.80	12.86	17.33	12.3	9.2	6.7	5.4	9%	9%	4.1%	5.7%	363.7	392.5	41.0	52.6	62.3	74.7			
Frontier Developments	216.00	587.49	849.11	0.4	0.3	2.2	3.0	6%	nm	0.0%	0.0%	96.1	96.7	5.2	-5.4	37.9	28.4			
Games Workshop Group	14570.00	525.16	561.13	27.7	26.0	17.3	16.1	4%	4%	3.2%	3.4%	586.6	630.0	239.1	244.3	270.3	289.8			
Glanbia	14.41	1.42	1.58	19.1	9.1	7.7	6.8	9%	10%	3.2%	3.5%	4218.5	4359.3	393.5	544.4	588.6				
Glanvagh Properties	1.70	0.19	0.21	8.9	8.1	9.8	8.4	9%	17%	0.0%	0.0%	1014.9	1074.2	140.9	146.8	146.0	152.1			
Grafton Group	916.10	69.15	75.78	13.2	12.1	8.0	7.3	4%	5%	4.4%	4.6%	2498.5	2599.8	160.9	177.4	297.9	319.4			
Greencore Renewables	0.79	0.14	0.14	5.5	5.5	14.0	15.3	18%	18%	9.0%	9.4%	216.6	215.4	189.2	187.9	189.2	187.9			
Greencore	190.60	14.54	16.80	13.1	11.3	6.1	5.4	7%	8%	1.4%	1.6%	1880.7	111.3	102.3	111.3	165.5	174.6			
Greggs	2118.00	143.54	156.49	14.8	13.5	6.6	5.9	2%	7%	3.4%	3.7%	2204.2	2417.3	207.4	226.6	368.7	406.9			
Hammerson	280.80																			
Heidelberg Materials	135.40	10.42	FALSE	13.0	FALSE	7.4	FALSE	7%	FALSE	1.8%	FALSE	2437.2	FALSE	2852.1	FALSE	3782.0	FALSE			
HomeWorld Group	129.00	0.17	0.20	9.1	7.6	6.6	5.0	11%	13%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1			
Howard Joinery	806.00	47.32	50.44	17.0	16.0	9.6	9.3	6%	5%	3.0%	3.4%	2403.7	2517.3	352.7	369.7	506.8	527.6			
IAG	340.60	0.57	0.61	7.2	6.7	3.1	2.8	12%	14%	2.4%	2.9%	32931.5	34248.6	4293.2	4336.0	6767.8	6982.1			
Ibtstock	166.20	11.00	13.41	15.1	12.4	8.5	7.3	7%	6%	3.3%	4.2%	424.5	456.0	64.9	77.6	95.7	109.6			
ICG	5.12	0.38	0.41	13.5	12.4	6.7	6.0	13%	6%	3.2%	3.3%	641.4	661.0	79.5	143.0	148.5				
IBES BFT	0.91	0.14	FALSE	6.7	FALSE	59.4	0.0	5%	FALSE	6.1%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE			
ITM Power	34.24	-5.68	-5.22	nm	nm	nm	nm	nm	nm	0.0%	0.0%	22.0	FALSE	-43.9	-40.0	-36.1	-30.2			
J.D. Wetherspoon	611.50	53.40	59.97	11.5	10.2	7.2	6.9	11%	11%	2.0%	2.0%	2107.7	2216.2	152.8	163.0	255.0	265.6			
Jet2	1507.00	186.16	193.23	8.1	7.8	1.2	0.9	21%	13%	0.3%	0.3%	743.5	818.7	535.1	532.5	814.9	865.1			
Johnson Matthey	1413.00	170.95	183.63	8.3	7.7	5.7	5.2	5%	13%	5.7%	6.0%	4033.1	3967.9	467.6	501.7	611.7	656.1			
Kainos Group	801.00	30.50	36.18	26.3	22.1	15.8	12.2	5%	6%	3.0%	3.1%	365.1	382.2	47.2	56.1	54.1	64.0			
Kerry Group	98.15	5.17	5.70	19.0	17.2	13.7	12.4	4%	5%	1.4%	1.6%	8189.1	8477.8	1027.5	1125.6	1344.3	1445.9			
KraftHeinz	242.40	20.31	21.55	11.9	11.0	5.7	5.2	10%	9%	5.1%	5.1%	12801.3	13298.6	622.2	661.3	1319.3	1389.5			
Kroger	65.10	3.99	4.51	16.3	14.4	10.8	9.4	4%	5%	0.9%	1.0%	9370.5	9996.1	926.6	1034.9	1226.6	1352.9			
LungLife AI	0.02	-0.14	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	8.6	FALSE	-3.5	FALSE	-3.2	FALSE			
Lufthansa	6.25	1.32	1.50	4.8	4.2	2.7	2.4	23%	29%	4.8%	4.8%	39356.7	40995.4	2328.1	2584.6	4702.1	5068.3			
Manston's	40.00	8.02	9.40	5.0	4.3	7.5	6.9	17%	18%	0.0%	0.0%	1919.8	169.8	202.9	213.3					
Mitchells & Butlers	227.50	27.75	29.49	8.2	7.7	6.0	5.6	8%	8%	0.0%	0.0%	2753.6	2865.2	319.9	329.5	461.2	475.0			
Molten Ventures	317.50	48.11	47.64	6.6	6.7	12.6	6.3	11%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3			
Mondi	1253.00	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE		
NCC Group	139.60	5.53	7.05	25.2	19.7	9.3	8.2	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9			
Orkin Enterprises	2.72	0.52	0.58	5.3	4.7	5.1	4.8	nm	13%	6.3%	6.6%	2222.9	2289.2	78.9	85.1	112.6	119.5			
Permanent TSB	1.41	0.13	0.23	10.5	6.2	0.3	0.3	2%	5%	12.3%	12.5%	656.2	704.8	135.7	183.4					
Persimmon	1265.00	93.29	110.44	13.6	11.5	1.1	1.1	3%	7%	3.2%	3.2%	3338.8	3628.4	437.0	512.5	459.5	537.1			
Playtech	739.00																			
Rank Group	87.80	7.76	8.63	11.3	10.2	5.1	4.8	1%	2%	1.5%	1.6%	782.2	818.7	55.7	60.7	105.7	112.1			
Renalytix	10.50	-0.34	-0.22	nm	nm	nm	nm													