

Goodbody Market Commentary Metrics



Company	Price		EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA	
	1c	2025	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026
ATB Group	5.54	6.69	0.76	0.76	8.1	7.9	0.8	0.8			13.9%	14.2%	4367.2	4302.4	2049.3	1930.2		
Air France-KLM	7.05	4.21	5.10	5.10	1.7	1.4	2.8	2.5	60%	73%	0.0%	0.0%	32674.5	33941.2	1812.6	2120.4	4695.9	5129.5
B&M European Value Retail	320.80	36.88	38.77	38.77	8.7	8.3	6.6	6.4	9%	10%	5.2%	5.0%	5543.3	5943.5	556.9	587.7	639.8	675.4
Bank of Ireland	8.99	1.29	1.41	1.41	7.0	6.4	0.6	0.6			7.2%	7.5%	4073.9	4143.6	1694.2	1694.2		
Balkancar Group	130.50	12.38	13.61	13.61	10.5	9.6	5.5	5.2	8%	8%	6.2%	6.5%	2255.6	2333.3	118.9	126.6	192.4	200.0
Barratt Redrow	397.70	28.40	36.45	36.45	14.0	10.9	0.7	0.7	6%	6%	4.0%	4.5%	5474.8	6087.1	546.9	746.6	559.7	754.4
Bellway	2170.00	160.68	195.10	195.10	13.5	11.1	0.7	0.7	7%	6%	2.8%	3.2%	2700.1	2930.9	243.9	343.7	293.7	343.8
Berkeley Group	3540.00	385.85	392.86	392.86	19.4	19.1	1.1	1.1	9%	6%	7.4%	7.4%	2383.5	2452.6	467.1	478.8	443.8	455.8
Bredon Group	405.50	35.17	40.47	40.47	11.5	10.0	5.9	5.2	8%	10%	3.7%	3.9%	1708.4	1800.2	180.1	198.9	286.2	312.4
Bresford Technology	414.80	19.85	22.35	22.35	20.9	18.6	12.9	11.0	6%	7%	5.7%	6.4%	228.1	251.2	63.8	71.5	65.2	74.1
C.B.C Group	139.00	0.12	0.14	0.14	13.8	11.5	8.0	7.5	3%	6%	3.7%	4.3%	1678.0	1719.5	80.3	90.1	114.3	124.1
Carn Homes	2.11	0.20	0.22	0.22	10.5	9.6	8.3	8.1	8%	10%	4.0%	4.7%	940.8	983.5	156.0	161.7	158.8	165.0
Cores Power	165.10	-8.62	FALSE	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-25.4	FALSE	-11.5	FALSE
Coca-Cola HBC	2724.00	2.49	2.74	2.74	13.1	11.9	7.9	7.2	3%	6%	3.4%	3.8%	11379.7	12059.0	1404.9	1375.4	1883.3	1883.3
Compass Group	2676.00	1.28	1.40	1.40	25.4	23.3	14.8	13.9	3%	3%	2.0%	2.2%	44397.5	47023.3	3228.9	3468.3	4272.5	4533.5
Convatec Group	226.80	0.17	0.19	0.19	16.1	14.4	9.3	8.3	6%	6%	2.4%	2.5%	2361.4	2495.0	517.1	573.9	652.9	709.2
Convatek	4690.00	265.78	281.21	281.21	17.6	16.7	8.5	8.1	6%	4%	1.9%	2.0%	2756.4	2886.0	197.9	206.8	287.3	293.3
CH2	91.55	606.43	681.92	681.92	15.1	13.4	9.8	9.1	10%	11%	1.8%	1.7%	37684.8	39606.8	3860.8	3854.4	6347.0	8202.9
Dalata Hotel Group	4.58	0.38	0.40	0.40	11.9	11.5	7.9	7.6	7%	9%	3.1%	3.2%	69.2	69.1	176.5	181.5	252.6	258.0
Dalata	0.75	-0.01	0.00	0.00	nm	294.2	213.8	23.3	nm	nm	4.1%	4.3%	20526.6	20873.3	601.7	646.1	963.0	1005.0
DCC	5085.00	481.01	500.33	500.33	10.6	10.2	5.9	5.2	10%	10%	4.1%	4.2%	20526.6	20873.3	601.7	646.1	963.0	1005.0
Devolver Digital	24.00	2.44	2.41	2.41	11.9	8.6	3.0	2.0	4%	3%	3.6%	3.7%	20087.8	20642.9	604.2	623.1	6363.4	6527.2
Diageo	2391.50	1.67	1.74	1.74	17.4	16.7	13.7	13.2	4%	4%	3.0%	3.2%	8400.0	8554.3	279.5	287.6	292.8	301.5
Dole	12.42	140.77	150.95	150.95	8.8	8.2	4.6	4.2	12%	12%	2.9%	3.1%	7445.9	7805.2	604.5	634.6	1072.5	1077.6
DS Smith	561.50	34.45	36.44	36.44	16.2	15.4	9.8	9.6	3%	4%	3.4%	3.6%	10135.5	10684.1	759.8	829.8	1561.9	1693.0
easyJet	494.20	25.87	31.77	31.77	6.5	6.0	2.2	2.2	4%	10%	2.9%	3.1%	5327.7	5523.9	770.2	932.4	1131.2	1194.9
Easton	624.20	53.01	76.20	76.20	11.8	8.2	7.1	6.7	8%	9%	2.5%	3.2%	1883.0	1981.9	255.5	289.6	380.7	419.5
Eusek	60.45	17.12	24.56	24.56	3.5	2.5	4.9	4.1	44%	57%	0.0%	0.0%	422.9	FALSE	56.6	FALSE		
F&D Holdings	12.80	1.66	FALSE	FALSE	7.7	FALSE	1.1	FALSE			9.8%	FALSE	FALSE	FALSE	FALSE	FALSE		
Farquhar	13870.00																	
Fever-Tree Drinks	631.00	34.07	40.45	40.45	18.5	15.6	9.8	8.1	6%	6%	2.9%	3.2%	391.7	417.0	50.4	59.7	63.8	74.0
FD Technologies	1894.00																	
Flutter Entertainment	253.74	9.10	11.77	11.77	27.9	21.6	15.1	11.8	4%	5%	0.0%	0.0%	15944.4	17676.6	2659.2	3229.8	3219.2	3939.8
Forterra	152.80	12.86	17.33	17.33	11.9	8.8	6.5	5.3	10%	10%	4.3%	5.9%	363.7	392.5	41.0	36.3	62.3	74.7
Frontier Developments	183.80	587.49	849.11	849.11	0.3	0.2	3.0	2.8	nm	nm	0.0%	0.0%	90.7	96.9	-8.2	-5.9	27.2	27.7
Games Workshop Group	13230.00	525.16	561.13	561.13	25.2	23.6	15.7	14.6	4%	4%	3.5%	3.7%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	13.77	1.42	1.58	1.58	9.7	8.7	7.4	6.5	9%	10%	3.4%	3.7%	4218.5	4390.3	393.5	435.9	542.4	588.6
Glanvish Properties	1.51	0.19	0.21	0.21	7.9	7.1	8.5	7.9	16%	14%	0.0%	0.0%	1017.5	1049.3	141.9	146.1	153.6	
Grafton Group	844.40	72.28	79.27	79.27	11.7	10.7	7.3	6.6	3%	6%	4.7%	5.0%	2478.7	2572.8	164.9	185.5	301.9	327.5
Greencourt Renewables	0.79	0.14	0.14	0.14	5.5	14.0	5.5	14.0	18%	18%	9.0%	9.5%	216.6	189.2	189.2	189.2	189.2	189.2
Greencore	172.20	14.54	16.80	16.80	11.8	10.3	5.6	5.0	9%	9%	1.5%	1.8%	1880.7	1947.0	102.3	111.3	165.5	174.6
Greggs	2882.00	143.54	156.49	156.49	14.5	13.3	6.5	5.8	2%	7%	3.4%	3.8%	2204.2	2417.3	207.4	226.6	368.7	406.9
Hammerston	267.20																	
Heidelberg Materials	1233.15	10.42	FALSE	FALSE	11.8	FALSE	6.8	FALSE	7%	FALSE	2.0%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	135.00	0.17	0.20	0.20	9.4	7.9	6.9	5.3	11%	12%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1
Howden Joinery	743.00	47.32	50.44	50.44	15.7	14.7	8.9	8.6	7%	5%	3.2%	3.7%	2403.7	2517.3	352.7	369.7	506.8	527.6
IAG	304.60	0.60	0.72	0.72	6.1	5.0	2.7	2.3	9%	13%	2.8%	3.3%	32931.5	34248.6	4369.0	4502.7	6767.8	6982.1
Intstock	158.80	11.00	13.41	13.41	14.4	11.8	8.1	7.0	8%	6%	3.5%	4.4%	424.5	456.0	64.9	77.6	95.7	109.6
ICG	5.18	0.38	0.41	0.41	13.6	12.6	6.8	6.1	13%	6%	3.1%	3.3%	641.4	661.0	74.0	79.5	143.0	148.5
IBES BETT	0.87	0.14	FALSE	FALSE	6.4	FALSE	56.5	0.0	5%	FALSE	6.4%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE
ITM Power	36.08	-5.68	-5.22	-5.22	nm	nm	nm	nm	nm	nm	0.0%	0.0%	27.0	53.6	-43.9	-40.0	-36.1	-30.2
J.D. Wetherspoon	587.50	53.40	59.97	59.97	11.0	9.8	7.1	6.8	11%	11%	2.0%	2.0%	2107.7	2212.2	152.8	163.0	255.0	265.6
Jet2	1420.00	168.15	182.42	182.42	8.4	7.8	1.3	0.9	20%	14%	1.2%	1.3%	7219.2	7960.0	438.8	457.7	718.2	788.1
Johnson Matthey	1316.00	170.95	183.63	183.63	7.7	7.2	4.9	4.9	5%	13%	6.1%	6.5%	4033.1	3967.9	467.6	501.7	611.7	656.1
Kainos Group	740.00	30.50	36.18	36.18	24.3	20.5	14.4	12.0	6%	7%	3.3%	3.3%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	91.20	5.17	5.70	5.70	17.6	16.0	12.8	11.5	4%	5%	1.5%	1.7%	8189.1	8477.8	1027.5	1125.6	1344.3	1445.9
Knauf	228.20	20.31	21.55	21.55	11.2	10.6	5.4	5.0	10%	9%	5.4%	5.4%	12801.3	13298.6	622.2	661.3	1313.9	1389.5
Kingspan	64.75	3.99	4.51	4.51	16.2	14.4	10.7	9.4	4%	5%	0.9%	1.0%	9370.5	9996.3	926.6	1034.9	1226.6	1352.9
LungLife AI	0.09	-0.14	FALSE	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	8.6	FALSE	-3.5	FALSE	-3.2	FALSE
Lufthansa	5.56	1.32	1.50	1.50	4.2	3.7	2.5	2.2	26%	33%	5.4%	5.4%	39356.7	40995.4	2328.1	2584.6	4702.1	5068.3
Manston's	39.60	8.02	9.40	9.40	4.9	4.2	7.5	6.9	17%	19%	0.0%	0.0%	919.8	953.4	159.2	168.8	202.9	213.3
Mitchells & Butlers	226.50	27.75	29.49	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	279.00	48.11	47.64	47.64	5.8	5.9												