

Goodbody Market Commentary Metrics



11 July 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	6.92	0.75	0.78	9.2	8.9	1.0	0.9			5.5%	6.0%	4433.5	4399.4	2114.3	2022.1				
Air France-KLM	11.05	4.80	5.60	2.3	2.0	3.5	3.1	56%	88%	0.0%	0.0%	33158.0	34514.6	1888.0	2114.7	4685.1	5008.0		
Applied Nutrition	128.40	8.57	9.66	15.0	13.3	10.6	8.8	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6		
B&M European Val	264.50	34.42	34.55	11.9	7.7	8.2	5.9	7%	12%	3.7%	5.7%	5571.0	5892.5	527.0	536.5	619.0	629.9		
Bank of Ireland	12.40	1.24	1.46	10.0	8.5	0.9	0.8			5.2%	5.6%	4023.1	4117.0	1670.9	1740.2				
Bakkavor Group	215.50																		
Barratt Redrow	425.60	30.44	34.82	14.0	12.2	0.7	0.7	7%	12%	3.8%	4.0%	5559.7	6075.9	601.6	720.8	614.4	726.6		
Bellway	2634.00	171.59	198.95	15.4	13.2	0.9	0.8	3%	5%	2.5%	3.0%	2759.5	3010.1	297.9	339.7	303.9	339.8		
Berkeley Group	3700.00	370.16	317.54	11.9	11.7	1.3	1.0	4%	6%	1.6%	3.3%	2486.5	2374.4	514.7	444.0	503.8	435.0		
Breedon Group	389.20	33.99	41.15	11.4	9.5	6.0	5.0	7%	10%	3.9%	4.1%	1801.5	1939.2	174.1	206.9	294.4	335.4		
Bytes Technology	334.60	25.75	27.00	13.0	12.4	9.2	7.8	8%	9%	9.3%	10.4%	222.1	248.3	72.7	81.7	74.2	83.4		
C & C Group	170.00	0.12	0.12	15.9	16.5	8.9	9.4	3%	5%	3.3%	3.3%	1665.5	1713.6	77.2	79.6	112.0	115.2		
Cairn Homes	2.22	0.20	0.23	10.9	9.8	7.1	7.0	4%	13%	4.1%	4.5%	961.1	1007.4	160.4	171.5	164.8	176.4		
Coca-Cola HBC	3912.00	2.55	2.76	17.8	16.5	10.7	10.0	4%	4%	2.6%	2.9%	11652.6	12299.1	1315.8	1418.3	1733.7	1847.1		
Compass Group	2543.00	1.30	1.43	26.6	24.1	15.4	14.4	3%	3%	1.9%	2.1%	45142.2	48542.0	3264.4	3539.6	4325.4	4639.3		
Cranswick	5160.00	273.41	292.01	17.3	17.7	9.2	8.9	3%	3%	2.1%	2.1%	2723.3	2942.6	190.8	220.0	293.2	315.2		
CRH	95.89	553.35	632.99	17.3	15.1	10.5	9.7	9%	10%	1.5%	1.6%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0		
Dalata Hotel Group	6.50																		
Datalex	0.35	-0.01	0.00	nm	456.8	249.1	27.2	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7		
DCC	4788.00	401.60	439.84	13.4	10.9	8.1	6.7	8%	12%	3.8%	4.5%	18011.1	17462.1	439.6	530.6	784.0	797.0		
Devolver Digital	23.00	1.30	1.72	24.0	18.1	5.2	4.2	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4		
Diageo	1948.00	1.63	1.69	16.2	15.6	12.9	12.4	4%	5%	3.9%	3.9%	20177.6	20867.1	5920.6	6165.1	6399.1	6633.2		
Dole	14.02	129.83	141.67	10.8	9.9	5.0	4.5	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5	393.1	408.0		
easyJet	524.20	76.39	80.78	6.9	6.5	2.1	2.0	18%	11%	2.7%	3.0%	10285.0	10762.9	806.4	851.7	1640.5	1752.8		
Entain	940.40	45.45	66.86	20.7	14.1	9.2	8.5	5%	6%	2.1%	2.2%	5280.4	5459.4	708.9	856.0	1106.1	1186.4		
Evoke	63.90	11.35	17.65	5.6	3.6	5.5	4.7	26%	37%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2		
FRD Holdings	13.80	1.66	FALSE	8.3	FALSE	1.2	FALSE			9.1%	FALSE	422.9	FALSE	56.6	FALSE				
Fever-Tree Drinks	894.00	24.15	29.72	37.0	39.1	20.7	18.1	4%	4%	2.0%	2.1%	374.5	412.0	30.9	37.0	44.9	52.0		
FD Technologies	2440.00																		
Flutter Entertainment	288.99	9.08	13.07	31.8	22.1	17.5	13.4	3%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	9400.1	4373.5		
Forterra	198.40	10.88	14.00	18.2	14.2	8.3	6.7	8%	11%	2.4%	3.4%	373.6	404.9	39.3	48.1	61.3	72.0		
Frontier Developm	357.00	587.49	849.11	0.6	0.4	3.3	2.9	5%	6%	0.0%	0.0%	90.1	96.7	8.2	10.3	40.8	44.1		
Fuller, Smith & Tu	586.00	34.22	40.26	19.2	14.6	8.6	7.8	nm	5%	3.0%	3.7%	376.3	394.6	47.2	42.4	67.6	70.1		
Games Workshop	16060.00	542.36	571.01	29.6	28.1	18.6	17.5	3%	4%	2.9%	3.1%	601.2	641.3	236.7	248.7	277.8	294.1		
Glanbia	14.86	1.27	1.42	11.7	10.5	9.0	8.0	7%	9%	3.0%	3.3%	3836.5	3938.2	343.8	381.9	491.1	530.6		
Glenveagh Proper	1.84	0.20	0.21	9.5	8.8	10.9	9.5	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9		
Grafton Group	934.80	69.84	77.34	13.4	12.1	6.4	5.9	4%	6%	4.1%	4.3%	2510.4	2601.8	159.3	176.0	309.3	330.0		
Greencoat Renewa	0.78	0.14	0.14	5.4	5.4	13.9	15.2	18%	18%	9.1%	9.6%	216.6	215.4	189.2	187.9	189.2	187.9		
Greencore	233.00																		
Greggs	1740.00	139.34	146.38	12.5	11.9	6.0	5.5	nm	4%	4.0%	4.2%	2189.2	2375.6	204.4	218.0	368.7	403.3		
Hammerston	289.60																		
Heidelberg Matera	204.80	10.42	FALSE	19.7	FALSE	10.6	FALSE	4%	FALSE	1.2%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	129.00	0.11	0.15	13.4	10.3	8.5	6.4	8%	11%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0		
Howden Joinery	831.00	46.31	51.01	17.9	16.3	9.9	9.3	5%	5%	2.9%	3.3%	2346.0	2433.2	341.3	367.9	499.6	529.3		
IAG	369.90	0.56	0.68	7.7	6.3	3.2	2.8	11%	17%	2.8%	3.5%	33203.3	34415.3	4332.3	4793.8	6951.7	7647.8		
Ibstock	153.00	8.23	11.39	18.6	13.4	9.8	7.5	3%	9%	2.7%	3.8%	393.5	440.9	45.6	62.7	81.0	101.9		
ICG	5.74	0.38	0.41	15.1	13.9	7.5	6.7	11%	5%	2.8%	3.0%	641.4	661.0	74.0	79.5	143.0	148.5		
IBES REIT	1.01	0.06	0.13	16.9	7.6	0.8	0.0	2%	2%	4.6%	5.0%	65.7	67.6	54.7	92.0	52.0	89.4		
J.D. Wetherspoon	786.50	50.97	58.99	15.4	13.3	8.7	8.3	2%	3%	1.5%	1.5%	2117.8	2229.4	141.4	153.0	249.6	261.7		
Jet2	1700.00	184.35	184.43	9.2	9.2	2.1	1.6	15%	13%	0.3%	1.1%	7366.6	8055.8	469.1	493.1	749.2	825.5		
Kainos Group	720.00	30.50	36.18	23.6	19.9	14.0	11.7	6%	7%	3.4%	3.4%	365.1	382.2	47.2	56.1	54.1	64.0		
Kerry Group	91.55	4.94	5.41	18.5	16.9	14.2	13.1	4%	4%	1.5%	1.7%	7035.3	7213.2	945.2	1017.3	1247.9	1321.9		
Kingfisher	281.30	20.41	19.65	12.9	14.3	5.5	5.7	10%	8%	4.7%	4.4%	12784.0	12889.1	628.0	608.3	1299.0	1276.0		
Kingspan	72.95	4.00	4.42	18.2	16.5	12.2	10.9	5%	5%	0.8%	0.8%	9378.8	9865.8	927.0	1014.4	1235.0	1334.4		
Lufthansa	7.50	1.06	1.24	7.1	6.0	7.0	6.4	18%	19%	4.0%	4.0%	39806.8	41731.0	1883.0	2163.6	3198.9	3533.3		
Marston's	43.90	7.80	8.74	5.6	5.0	7.4	6.9	14%	15%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2		
Mitchells & Butlers	289.00	28.53	29.75	10.1	9.7	6.7	6.4	6%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5		
Molten Ventures	350.40	48.11	47.64	7.3	7.4	6.7	6.9	10%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3		
Mondi	1210.00	1.04	1.36	13.5	10.3	7.7	6.4	3%	10%	4.6%	4.8%	7802.2	8299.0	744.0	928.7	1212.2	1418.3		
NCC Group	143.40	5.53	7.09	25.9	20.2	9.6	8.4	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9		
Origin Enterprises	3.78	0.52	0.57	7.3	6.7	6.3	5.8	nm	9%	4.5%	4.8%	2189.6	2252.6	78.9	83.8	110.8	117.3		
Permanent TSB	2.12	0.12	0.22	18.1	9.5	0.5	0.5			0.9%	4.2%	654.2	694.6	146.4	173.2				
Persimmon	1236.00	94.75	110.68	13.0	11.2	1.1	1.0	3%	10%	3.2%									