

Goodbody Market Commentary Metrics



12 March 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	
AIB Group	6.73	0.69	0.69	9.8	9.7	1.0	1.0			4.8%	5.1%	4386.9	4331.4	2068.8	1958.1			
Air France-KLM	10.37	4.21	5.10	2.5	2.0	3.0	2.7	41%	50%	0.0%	0.0%	32674.5	33941.2	1812.6	2120.4	4695.9	5129.5	
Applied Nutrition	116.40	8.57	9.66	13.6	12.0	9.5	7.9	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6	
B&M European Val	271.30	35.35	36.60	7.7	7.4	6.0	5.9	10%	11%	5.9%	6.1%	5508.6	5874.6	536.1	557.8	618.4	644.5	
Bank of Ireland	11.69	1.37	1.46	8.5	8.0	0.8	0.8			5.9%	6.0%	4094.9	4182.6	1715.1	1730.6			
Bakkavor Group	151.00	12.36	13.86	12.2	10.9	6.1	5.7	7%	8%	5.4%	5.6%	2326.0	2405.9	118.8	128.6	192.2	202.0	
Barratt Redrow	434.90	28.40	36.45	15.3	11.9	0.7	0.7	5%	7%	3.7%	4.1%	5474.8	6087.1	546.9	748.6	559.7	754.4	
Bellway	2318.00	160.68	191.29	14.4	12.1	0.8	0.7	5%	6%	2.8%	3.5%	2700.1	2972.6	287.6	335.4	293.7	335.5	
Berkeley Group	3672.00	285.85	292.86	12.8	12.5	1.1	1.1	8%	6%	7.1%	7.1%	2383.5	2452.6	467.1	478.8	443.8	455.8	
Breedon Group	467.50	36.60	42.29	12.8	11.1	6.5	5.4	5%	11%	3.3%	3.4%	1862.4	1997.3	185.8	211.4	309.6	343.0	
Bytes Technology	410.00	19.85	22.25	20.7	18.4	12.7	10.9	6%	7%	5.8%	6.5%	228.1	251.2	63.8	71.5	66.2	74.1	
C & C Group	146.40	0.12	0.14	14.4	12.1	8.3	7.7	5%	6%	3.5%	4.1%	1678.0	1719.5	80.3	90.1	114.3	124.1	
Cairn Homes	1.98	0.20	0.22	9.9	9.1	7.2	7.1	6%	13%	9.1	5.1%	941.1	1003.3	158.2	164.3	161.0	167.6	
Ceres Power	59.60	-8.62	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE	
Coca-Cola HBC	3460.00	2.49	2.74	16.5	15.0	9.7	8.9	4%	5%	2.7%	3.0%	11379.7	12059.0	1304.0	1404.9	1755.4	1883.3	
Compass Group	2627.00	1.28	1.40	26.5	24.3	15.4	14.5	3%	3%	1.9%	2.1%	44397.5	47022.3	3228.9	3468.3	4272.5	4533.5	
ConvaTec Group	264.00	0.16	0.19	21.1	18.2	11.4	10.3	5%	6%	2.9%	2.2%	2356.5	2498.7	513.7	579.7	692.5	746.1	
Cranswick	4925.00	266.23	281.61	18.5	17.5	9.0	8.5	5%	5%	1.8%	1.9%	2721.5	2849.8	195.8	206.6	282.2	293.1	
CRH	94.63	571.88	639.76	16.5	14.8	10.0	9.3	10%	11%	1.6%	1.6%	37929.8	39857.8	5726.1	6204.3	7613.0	8205.2	
Dalata Hotel Group	5.58	0.38	0.40	14.6	14.0	8.8	8.5	6%	7%	2.5%	2.7%	684.2	698.5	176.5	181.5	252.6	258.0	
Datalex	0.35	-0.01	0.00	nm	427.3	232.4	25.3	nm	nm	1%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7	
DCC	5260.00	477.33	500.52	11.0	10.5	6.1	5.5	9%	10%	3.9%	4.1%	20507.9	20842.5	597.1	640.3	958.4	1006.1	
Devolver Digital	21.50	1.30	1.72	21.4	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	2124.00	1.64	1.69	16.8	16.3	13.4	13.0	5%	5%	3.8%	3.8%	20079.9	20459.9	5925.2	6083.1	6358.9	6485.9	
Dole	14.43	134.86	144.75	10.7	10.0	5.1	4.7	10%	10%	2.4%	2.6%	8341.7	8494.8	275.8	283.8	389.0	397.6	
easyJet	484.80	75.89	81.77	6.4	5.9	1.9	1.8	19%	12%	2.9%	3.2%	10339.5	10922.0	800.9	861.5	1635.0	1762.6	
Entain	643.80	45.45	66.86	14.2	9.6	7.5	6.9	7%	8%	3.1%	3.2%	5280.4	5459.4	708.9	856.0	1106.1	1186.4	
Evoke	66.40	17.12	24.56	3.9	2.7	5.0	4.2	40%	52%	0.0%	0.0%	1883.0	1981.9	255.5	289.6	380.7	419.5	
FBD Holdings	13.50	1.66	FALSE	8.1	FALSE	1.1	FALSE			9.3%	FALSE	422.9	FALSE	56.6	FALSE			
Ferguson	12280.00																	
Fever-Tree Drinks	709.50	24.26	30.07	29.2	23.6	15.0	12.5	6%	4%	2.5%	2.6%	378.3	416.7	35.9	43.1	45.7	53.5	
FD Technologies	1590.00	-57.35	42.11	nm	37.8	22.1	12.4	nm	nm	0.0%	0.0%	164.1	96.8	-4.3	11.0	17.9	29.6	
Flutter Entertainment	231.74	9.08	13.07	25.5	17.7	14.5	11.1	4%	6%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5	
Forterra	159.00	12.86	17.33	12.4	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 Developm	196.20	587.49	849.11	0.3	0.2	2.0	2.7	7%	nm	0.0%	0.0%	90.1	96.7	5.2	-5.4	37.9	28.4	
Fuller, Smith & Tu	520.00	30.21	34.76	17.2	15.0	7.8	7.4	1%	4%	3.8%	4.0%	374.6	396.6	49.3	41.0	65.8	69.8	
Games Workshop	14130.00	525.16	561.13	26.9	25.2	16.8	15.6	4%	4%	3.3%	3.5%	586.6	630.0	229.1	244.3	270.3	289.8	
Glanbia	11.27	1.27	1.42	8.9	7.9	7.1	6.2	10%	12%	4.0%	4.4%	3843.3	3945.3	344.7	383.0	492.1	531.7	
Glenveagh Propert	1.46	0.19	0.21	7.7	7.0	8.6	7.2	10%	20%	0.0%	0.0%	1014.9	1074.2	140.9	146.8	146.0	152.1	
Grafton Group	860.30	69.15	75.78	12.4	11.4	7.5	6.9	4%	6%	4.6%	4.9%	2498.5	2589.8	160.9	177.4	297.9	319.4	
Greencoat Renewa	0.76	0.14	0.14	5.2	5.2	13.8	15.1	19%	19%	9.4%	9.8%	216.6	215.4	189.2	187.9	189.2	187.9	
Greencore	194.80	14.54	16.80	13.4	11.6	6.2	5.6	7%	8%	1.3%	1.6%	1880.7	1947.0	102.3	111.3	165.5	174.6	
Greggs	1909.00	139.34	146.38	13.7	13.0	6.5	6.0	nm	4%	3.6%	3.8%	2189.2	2375.6	204.4	218.0	368.7	403.3	
Hammerson	251.80																	
Heidelberg Materi	157.15	10.42	FALSE	15.1	FALSE	8.4	FALSE	6%	FALSE	1.6%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE	
Hostelworld Group	126.00	0.17	0.20	8.7	7.3	6.4	4.8	12%	13%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1	
Howden Joinery	728.50	47.32	50.44	15.4	14.4	8.8	8.5	7%	6%	3.3%	3.8%	2403.7	2517.3	352.7	369.7	506.8	527.6	
IAG	291.50	0.57	0.61	6.0	5.7	2.7	2.4	14%	16%	2.9%	3.5%	32931.5	34248.6	4293.2	4336.0	6767.8	6982.1	
Ibstock	165.40	11.00	13.41	15.0	12.3	8.4	7.2	7%	6%	3.3%	4.2%	424.5	456.0	64.9	77.6	95.7	109.6	
ICG	5.24	0.38	0.41	13.8	12.7	6.9	6.1	13%	6%	3.1%	3.3%	641.4	661.0	74.0	79.5	143.0	148.5	
IRES REIT	0.91	0.14	FALSE	6.7	FALSE	59.1	0.0	5%	FALSE	6.1%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE	
ITM Power	25.62	-5.68	-5.22	nm	nm	0.1	nm	nm	nm	0.0%	0.0%	22.0	53.6	-43.9	-40.0	-36.1	-30.2	
J D Wetherspoon	593.50	51.89	57.15	11.4	10.4	7.3	7.0	4%	5%	2.0%	2.0%	2117.9	2232.4	146.0	155.2	252.4	262.0	
Jet2	1393.00	180.21	184.27	7.7	7.6	1.0	0.7	22%	14%	0.3%	1.3%	7366.6	8093.4	516.1	503.8	795.9	836.4	
Johnson Matthey	1429.00	170.95	183.63	8.4	7.8	5.7	5.2	5%	12%	5.7%	5.9%	4033.1	3967.9	467.6	501.7	611.7	656.1	
Kainos Group	674.00	30.50	36.18	22.1	18.6	12.9	10.8	6%	7%	3.6%	3.7%	365.1	382.2	47.2	56.1	54.1	64.0	
Kerry Group	95.15	5.17	5.70	18.4	16.7	13.3	12.0	4%	5%	1.5%	1.6%	8189.1	8477.8	1027.5	1125.6	1344.3	1445.9	
Kingfisher	261.20	20.31	21.55	12.9	12.1	6.0	5.5	9%	8%	4.7%	4.7%	12801.3	13298.6	622.2	661.3	1319.3	1389.5	
Kingspan	79.70	3.99	4.51	20.0	17.7	12.9	11.3	3%	4%	0.8%	0.8%	9370.5	9996.3	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	7.44	1.32	1.50	5.7	5.0	3.0	2.7	20%	25%	4.0%	4.0%	39356.7	40995.4	2328.1	2584.6	4702.1	5068.3	
Marston's	37.20	7.74	8.85	4.8	4.2	7.2	6.7	16%	18%	0.0%	0.0%	927.3	957.2	157.7	166.2	202.3	211.1	
Mitchells & Butlers	223.00	28.18	30.39	7.9	7.3	5.8	5.5	9%	7%	0.0%	0.0%	2711.6	2815.9	322.1	334.7	456.3	473.1	
Molten Ventures	257.00	48.11	47.64	5.3	5.4	4.9	5.1	14%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3	
Mondi	1250.00	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	
NCC Group	130.60	5.53	7.09	23.6	18.4	8.8	7.7	5%	6%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9	
Origin Enterprises	3.04	0.52	0.58	5.9	5.2	5.4	5.1	nm	12%	5.6%	5.9%	2222.9	2289.2	78.9	85.1	112.6	119.5	
Permanent TSB	1.55	0.11	0.25	13.8	6.2	0.4	0.3			2.3%	11.2%	657.9	708.7	137.4	197.2			
Persimmon	1234.50	93.72	111.41	13.2	11.1	1.1	1.0	4%	8%	3.2%	3.2%	3456.4	3755.4	438.9	516.7	461.6	541.5	
Playtech	713.00																	
Rank Group	84.20	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	
Renalytix	9.00	-0.34	-0.22	nm	nm	nm	nm	nm	260%	0.0%	0.0%	28.1	61.8	-30.9	-19.8	-29.1	-17.9	
Ryanair	20.17	1.45	1.97	13.9	10.2	7.4	5.5	7%	9%	2.0%	2.1%	13949.8	14713.9	1611.9	2212.5	2860.1	3529.7	
SIG	12.20																	
Smith+Nephew	14.77	1.16	1.32	12.7	11.2	9.4	8.6	5%	6%	2.8%	3.2%	6110.0	6443.8	1219.8	1342.2	1646.1	1775.5	
Smurfit Westrock	43.33	2.76	3.70	15.7	11.7													