

Goodbody Market Commentary Metrics



September 2025																		
	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA		
Company	1c	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	
AIB Group	7.49	0.80	0.77	9.4	9.8	1.1	1.0			5.3%	5.5%	4428.2	4411.5	2087.0	2036.3			
Air France-KLM	13.14	6.42	5.79	2.0	2.3	3.4	3.1	48%	75%	0.0%	0.0%	33220.1	34529.6	1983.6	2172.4	4781.2	5066.2	
Applied Nutrition	162.80	9.12	10.12	17.8	16.1	12.6	10.8	4%	4%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3	
B&M European Value Ret	242.20	34.42	33.20	11.9	7.3	8.2	5.7	7%	13%	3.7%	6.2%	5571.0	5855.6	527.0	518.3	619.0	614.6	
Bank of Ireland	13.42	1.20	1.42	11.2	9.5	1.0	0.9			4.8%	5.1%	4099.0	4148.1	1687.2	1777.2			
Bakkavor Group	224.00																	
Barratt Redrow	368.20	35.48	29.14	10.4	12.6	0.6	0.7	nm	6%	4.3%	4.6%	5582.9	5859.2	553.6	600.5	667.9	609.1	
Bellway	2320.00	172.35	197.69	13.5	11.7	0.8	0.7	5%	9%	3.0%	3.4%	2780.5	2999.9	299.1	337.6	305.2	337.7	
Berkeley Group	3640.00	370.16	317.54	11.9	11.5	1.3	1.0	4%	6%	1.6%	3.3%	2486.5	2374.4	514.7	444.0	503.8	435.0	
Breedon Group	369.80	31.45	33.73	11.8	11.0	6.4	5.8	4%	9%	4.1%	4.3%	1762.0	1842.4	164.5	177.6	287.6	305.5	
Byttes Technology	416.40	25.75	27.00	16.2	15.4	11.9	10.2	7%	7%	7.5%	8.4%	222.1	248.3	72.7	81.7	74.2	83.4	
C & C Group	166.80	0.12	0.12	15.9	16.2	8.9	9.2	3%	5%	3.3%	3.4%	1665.5	1713.6	77.2	79.6	112.0	115.2	
Cairn Homes	2.11	0.20	0.23	10.4	9.3	6.7	6.6	4%	14%	4.3%	4.8%	961.1	1007.4	160.4	171.5	164.8	176.4	
Coca-Cola HBC	3714.00	2.66	2.86	16.1	15.0	10.1	9.3	4%	4%	2.7%	2.9%	11597.4	12264.7	1337.9	1444.4	1748.7	1872.1	
Compass Group	2610.00	1.31	1.43	27.0	24.7	15.7	14.7	3%	3%	1.9%	2.0%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9	
Cranswick	5220.00	273.41	292.01	17.3	17.9	9.2	9.0	3%	3%	2.1%	2.0%	2723.3	2942.6	190.8	220.0	293.2	315.2	
CRH	114.47	544.93	605.90	21.0	18.9	12.2	11.4	7%	8%	1.3%	1.3%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5	
Dalata Hotel Group	6.41																	
Datalex	0.30																	
DCC	4750.00	401.60	433.35	13.4	11.0	8.1	6.8	8%	12%	3.8%	4.6%	18011.1	14959.5	439.6	521.4	784.0	787.9	
Devolver Digital	23.50	1.30	1.72	24.5	18.5	5.4	4.4	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4	
Diageo	1906.00	1.66	1.72	18.0	15.1	12.1	11.9	6%	6%	3.5%	4.0%	20245.0	20581.4	5897.0	6124.6	7422.0	6735.5	
Dole	13.98	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	465.60	69.60	78.55	6.7	5.9	2.2	1.9	18%	10%	3.1%	3.3%	10165.0	10841.7	671.9	829.1	1452.4	1688.7	
Entain	860.00	45.45	66.86	18.9	12.9	8.7	8.1	5%	6%	2.3%	2.4%	5280.4	5459.4	708.9	856.0	1106.1	1186.4	
Evoke	58.80	11.35	17.65	5.2	3.3	5.5	4.7	29%	41%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2	
FBD Holdings	13.90	1.66	FALSE	8.4	FALSE	1.2	FALSE			FALSE	9.0%	FALSE	472.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	872.00	24.15	29.72	36.1	29.3	20.1	17.6	4%	4%	2.0%	2.1%	374.5	412.0	30.9	37.0	44.9	52.0	
Flutter Entertainment	287.17	8.04	12.13	35.7	23.7	18.6	14.1	3%	4%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7	
Forterra	191.60	13.07	14.50	14.7	13.2	8.1	6.4	6%	11%	3.0%	3.5%	380.9	413.7	41.4	49.9	62.4	74.3	
Frontier Developments	380.00	587.49	849.11	0.6	0.4	3.8	3.5	5%	2%	0.0%	0.0%	96.6	96.6	5.7	9.1	36.0	38.4	
Fuller, Smith & Turner	572.00	34.22	40.26	19.2	14.2	8.6	7.7	nm	5%	3.0%	3.8%	376.3	394.6	47.2	42.4	67.6	70.1	
Games Workshop Group	14980.00	525.16	561.13	28.5	26.7	17.8	16.6	4%	4%	3.1%	3.3%	586.6	630.0	229.1	244.3	270.3	289.8	
Glanbia	16.54	1.32	1.42	12.5	11.6	9.8	8.8	7%	8%	2.7%	3.0%	3871.8	3900.0	353.2	387.3	502.6	536.3	
Glenveagh Properties	1.96	0.20	0.21	10.0	9.3	11.5	10.1	7%	14%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9	
Grafton Group	900.00	70.31	75.86	12.8	11.9	6.3	5.8	4%	7%	4.2%	4.4%	2525.1	2640.5	157.0	171.0	306.0	324.0	
Greencoast Renewables	0.74	0.14	0.14	5.1	5.1	13.7	15.0	19%	19%	9.6%	10.0%	216.6	215.4	189.2	187.9	189.2	187.9	
Greencore	248.00																	
Greegas	1605.00	129.34	132.76	12.4	12.1	5.9	5.5	nm	4%	4.0%	4.1%	2171.5	2354.7	190.6	199.2	354.9	384.5	
Hammerson	288.40																	
Heidelberg Materials	208.00	10.42	FALSE	20.0	FALSE	10.7	FALSE	4%	FALSE	1.2%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE	
Hostelworld Group	116.00	0.11	0.15	12.0	9.2	7.6	5.6	9%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0	
Howden Joinery	837.50	46.32	50.52	18.1	16.6	9.9	9.3	4%	5%	2.9%	3.3%	2418.6	2512.5	340.3	365.0	498.8	528.4	
JAG	382.30	0.66	0.75	6.7	5.9	2.9	2.5	16%	20%	2.7%	3.4%	33522.1	34437.3	4950.0	5227.8	7569.5	8103.3	
Jbstock	135.40	7.29	12.30	18.6	11.0	9.2	6.5	2%	11%	3.0%	4.6%	389.0	435.8	43.7	67.5	78.8	106.3	
JCG	5.88	0.40	0.44	14.7	13.4	7.7	7.1	11%	4%	2.8%	2.9%	633.6	664.4	74.1	79.3	143.1	148.3	
JRES REIT	0.99	0.06	0.13	16.6	7.5	0.8	0.0	2%	3%	4.7%	5.1%	65.7	67.6	54.7	92.0	52.0	89.4	
J D Wetherspoon	688.00	59.97	58.99	13.5	11.7	8.1	7.8	2%	4%	1.7%	1.7%	2117.8	2229.4	141.4	153.0	249.6	261.7	
Jet2	1465.00	217.83	221.15	6.6	6.6	1.5	1.4	23%	15%	1.1%	1.4%	7173.5	7773.7	446.5	494.6	728.6	826.7	
Kainos Group	892.00	30.50	36.18	29.2	24.7	17.8	15.0	5%	6%	2.6%	2.8%	365.1	382.2	47.2	56.1	54.1	64.0	
Kerry Group	80.10	4.90	5.41	16.3	14.8	12.3	11.2	4%	5%	1.7%	1.9%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5	
kingfisher	245.30	20.41	19.97	12.9	12.3	5.5	5.0	10%	10%	4.7%	5.1%	12784.0	12842.4	628.0	608.8	1299.0	1272.8	
Kingspan	69.45	3.83	4.15	18.1	16.7	12.2	11.4	4%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1	
Lufthansa	7.53	1.14	1.29	6.6	5.9	6.8	6.2	18%	20%	4.5%	5.1%	39502.4	41427.8	2001.1	2229.4	3317.0	3622.3	
Marston's	37.80	7.80	8.74	4.8	4.3	7.2	6.7	17%	17%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2	
Mitchells & Butlers	261.00	28.53	29.75	9.1	8.8	6.3	6.0	7%	6%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5	
Molten Ventures	364.00	48.11	47.64	7.6	7.6	6.9	7.2	10%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3	
Mondi	1006.50	0.96	1.21	12.1	9.6	7.1	6.1	1%	9%	5.6%	5.8%	8059.9	8683.9	702.8	839.2	1186.4	1351.5	
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	3.85	0.52	0.54	7.5	7.2	6.2	5.9	nm	6%	4.5%	4.7%	2177.5	2256.2	79.6	83.8	111.3	117.1	
Permanent TSB	2.28	0.08	0.21	30.0	10.7	0.6	0.5			0.9%	3.1%	653.5	693.8	128.5	172.3			
Persimmon	1089.00	93.59	104.31	11.6	10.4	0.9	0.9	nm	5%	3.7%	3.7%	3523.6	3758.4	444.9	489.6	467.4	514.9	
Playtech	412.00	0.14	0.20	34.4	23.8	0.8	0.8	1%	2%	0.0%	0.0%	797.8	831.6	73.9	89.4	175.2	193.7	
Rank Group	138.20	7.76	8.63	17.8	16.0	7.4	6.9	1%	1%	0.9%	1.0%	782.2	818.7	55.7	60.7	105.7	112.1	
Ryanair	23.82	1.45	2.02	12.5	11.8	6.7	6.8	10%	10%	2.2%	1.8%	13948.5	15233.2	1558.0	</			