

Goodbody Market Commentary Metrics



August 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	7.17	0.80	0.77	9.0	9.4	1.1	1.0			5.5%	5.7%	4428.2	4411.5	2087.0	2036.3		
Air France-KLM	13.74	6.42	5.79	2.1	2.4	3.5	3.1	46%	72%	0.0%	0.0%	33220.1	34529.6	1983.6	2172.4	4781.2	5066.2
Applied Nutrition	130.40	8.57	9.66	15.2	13.5	10.7	9.0	4%	5%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6
B&M European Val	227.80	34.42	34.55	11.9	6.6	8.2	5.3	7%	14%	3.7%	6.6%	5571.0	5892.5	527.0	536.5	619.0	629.9
Bank of Ireland	12.95	1.20	1.42	10.8	9.1	1.0	0.9			4.9%	5.3%	4099.0	4148.1	1687.2	1777.2		
Bakkavor Group	233.00																
Barratt Redrow	384.10	35.48	29.14	10.8	13.2	0.7	0.7	nm	6%	4.2%	4.4%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2490.00	172.35	197.69	14.4	12.6	0.8	0.8	4%	9%	2.8%	3.2%	2780.5	2999.9	299.1	337.6	305.2	337.7
Berkeley Group	3842.00	370.16	317.54	11.9	12.1	1.3	1.1	4%	6%	1.6%	3.2%	2486.5	2374.4	514.7	444.0	503.8	435.0
Breedon Group	377.00	31.45	33.73	12.0	11.2	6.4	5.9	4%	9%	4.0%	4.2%	1762.0	1842.4	164.5	177.6	287.6	305.5
Bytes Technology	360.00	25.75	27.00	14.0	13.3	10.1	8.6	8%	9%	8.7%	9.7%	222.1	248.3	72.7	81.7	74.2	83.4
C & C Group	177.60	0.12	0.12	15.9	17.2	8.9	9.6	3%	4%	3.3%	3.2%	1665.5	1713.6	77.2	79.6	112.0	115.2
Cairn Homes	2.17	0.20	0.23	10.7	9.6	6.9	6.8	4%	14%	4.2%	4.6%	961.1	1007.4	160.4	171.5	164.8	176.4
Coca-Cola HBC	3850.00	2.66	2.86	16.7	15.6	10.5	9.7	4%	4%	2.6%	2.8%	11597.4	12264.7	1337.9	1444.4	1748.7	1872.1
Compass Group	2573.00	1.31	1.43	26.7	24.4	15.5	14.5	3%	3%	1.9%	2.0%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
Cranswick	5240.00	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	113.65	553.90	633.97	20.5	17.9	12.1	11.1	7%	9%	1.3%	1.4%	37512.9	39301.7	5607.1	6196.0	7445.4	8061.6
Dalata Hotel Group	6.38																
Datalex	0.28																
DCC	4698.00	401.60	439.84	13.4	10.7	8.1	6.6	8%	12%	3.8%	4.6%	18011.1	17462.1	439.6	530.6	784.0	797.0
Devolver Digital	23.50	1.30	1.72	24.5	18.6	5.4	4.4	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	2035.00	1.66	1.72	18.0	16.1	12.1	12.5	6%	6%	3.5%	3.7%	20245.0	20581.4	5897.0	6124.6	7422.0	6735.5
Dole	14.40	129.83	141.67	11.1	10.2	5.1	4.6	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5	393.1	408.0
easyJet	504.40	69.60	78.55	7.2	6.4	2.4	2.1	17%	9%	2.8%	3.1%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	895.00	45.45	66.86	19.7	13.4	8.9	8.3	5%	6%	2.2%	2.3%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	63.50	11.35	17.65	5.6	3.6	5.5	4.7	27%	38%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	14.75	1.66	FALSE	8.9	FALSE	1.3	FALSE			8.5%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	938.00	24.15	29.72	38.8	31.6	21.8	19.1	3%	3%	1.9%	2.0%	374.5	412.0	30.9	37.0	44.9	52.0
Flutter Entertainm	289.77	8.04	12.13	36.0	23.9	18.8	14.2	3%	4%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	196.20	13.07	14.50	15.0	13.5	8.2	6.5	6%	11%	2.9%	3.5%	380.9	413.7	41.4	49.9	62.4	74.3
Frontier Developm	375.50	587.49	849.11	0.6	0.4	3.8	3.2	4%	5%	0.0%	0.0%	90.6	96.6	5.7	9.1	38.3	43.0
Fuller, Smith & Tu	554.00	34.22	40.26	19.2	13.8	8.6	7.5	nm	5%	3.0%	3.9%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop	15220.00	525.16	561.13	29.0	27.1	18.1	16.8	3%	4%	3.0%	3.2%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	16.55	1.27	1.42	13.1	11.7	9.9	8.8	7%	8%	2.7%	3.0%	3836.5	3938.2	343.8	381.9	491.1	530.6
Glenveagh Propert	1.94	0.20	0.21	9.9	9.2	11.4	10.0	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9
Grafton Group	878.50	69.97	77.75	12.6	11.3	6.1	5.6	4%	7%	4.3%	4.6%	2528.5	2633.1	159.3	176.4	309.3	330.4
Greencoat Renewa	0.76	0.14	0.14	5.3	5.3	13.9	15.1	18%	18%	9.3%	9.7%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	250.50																
Greggs	1581.00	129.34	132.76	12.2	11.9	5.8	5.4	nm	4%	4.1%	4.2%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerson	296.60																
Heidelberg Materis	205.90	10.42	FALSE	19.8	FALSE	10.6	FALSE	4%	FALSE	1.2%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	114.00	0.11	0.15	11.8	9.1	7.4	5.5	10%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	867.00	46.32	50.52	18.7	17.2	10.2	9.6	4%	5%	2.8%	3.2%	2418.6	2512.5	340.3	365.0	498.8	528.4
JAG	384.40	0.66	0.75	6.7	5.9	2.9	2.5	16%	19%	2.7%	3.4%	33522.1	34437.3	4950.0	5227.8	7569.5	8103.3
Ibstock	145.80	7.29	12.30	20.0	11.9	9.7	6.9	2%	10%	2.7%	4.2%	389.0	435.8	43.7	67.5	78.8	106.3
ICG	5.48	0.40	0.44	13.7	12.5	7.2	6.6	12%	4%	3.0%	3.1%	633.6	664.4	74.1	79.3	143.1	148.3
IRES REIT	0.98	0.06	0.13	16.3	7.4	0.8	0.0	2%	3%	4.8%	5.1%	65.7	67.6	54.7	92.0	52.0	89.4
J.D. Wetherspoon	737.50	50.97	58.99	14.5	12.5	8.4	8.0	2%	4%	1.6%	1.6%	2117.8	2229.4	141.4	153.0	249.6	261.7
Jet2	1610.00	217.83	221.15	6.6	7.3	1.5	1.8	23%	14%	1.1%	1.2%	7173.5	7773.7	446.5	494.6	728.6	826.7
Kainos Group	689.00	30.50	36.18	22.6	19.0	13.3	11.1	6%	7%	3.5%	3.6%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	79.70	4.90	5.41	16.3	14.7	12.2	11.2	4%	5%	1.8%	1.9%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5
Kingfisher	274.50	20.41	19.65	12.9	14.0	5.5	5.6	10%	9%	4.7%	4.5%	12784.0	12889.1	628.0	608.3	1299.0	1276.0
Kingspan	69.85	4.00	4.42	17.5	15.8	11.7	10.5	5%	5%	0.8%	0.9%	9378.8	9865.8	927.0	1014.4	1235.0	1334.4
Lufthansa	8.14	1.14	1.29	7.2	6.3	7.0	6.4	17%	18%	4.2%	4.7%	39502.4	41427.8	2001.1	2229.4	3317.0	3622.3
Marston's	40.50	7.80	8.74	5.2	4.6	7.3	6.8	15%	16%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	270.00	28.53	29.75	9.5	9.1	6.4	6.1	7%	6%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5
Molten Ventures	369.40	48.11	47.64	7.7	7.8	7.1	7.3	9%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	1065.00	0.96	1.21	12.8	10.2	7.4	6.3	1%	9%	5.3%	5.5%	8059.9	8683.9	702.8	839.2	1186.4	1351.5
NCC Group	142.00	5.53	7.09	25.7	20.0	9.5	8.3	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.74	0.52	0.57	7.2	6.6	6.2	5.8	nm	9%	4.6%	4.8%	2189.6	2252.6	78.9	83.8	110.8	117.3
Permanent TSB	2.26	0.08	0.21	29.8	10.6	0.6	0.5			0.9%	3.1%	653.5	693.8	128.5	172.3		
Persimmon	1129.00	93.59	104.31	12.1	10.8	1.0	0.9	nm	5%	3.5%	3.5%	3523.6	3758.4	444.9	489.6	467.4	514.9
Playtech	422.00	0.12	0.20	41.3	24.4	0.8	0.8	1%	2%	0.0%	0.0%	797.8	831.6	65.4	89.4	166.7	193.7
Rank Group	145.80	7.76	8.63	18.8	16.9	7.7	7.3	1%	1%	0.9%	1.0%	782.2	818.7	55.7	60.7	105.7	112.1
Ryanair	26.14	1.45	2.02	12.5	12.9	6.7											