

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	7.60	0.80	0.77	9.5	9.9	1.1	1.1			5.2%	5.4%	4428.2	4411.5	2087.0	2036.3		
Air France-KLM	12.56	6.42	5.79	2.0	2.2	3.4	3.1	50%	78%	0.0%	0.0%	33220.1	34529.6	1983.6	2172.4	4781.2	5066.2
Applied Nutrition	161.80	9.12	10.12	17.7	16.0	12.5	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	244.10	34.42	33.20	11.9	7.4	8.2	5.7	7%	12%	3.7%	6.1%	5571.0	5855.6	527.0	518.3	619.0	614.6
Bank of Ireland	13.55	1.20	1.42	11.3	9.6	1.0	1.0			4.7%	5.1%	4099.0	4148.1	1687.2	1777.2		
Bakkavor Group	220.00																
Barratt Redrow	366.30	35.48	29.14	10.3	12.6	0.6	0.7	nm	6%	4.4%	4.6%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2312.00	172.35	197.69	13.4	11.7	0.8	0.7	5%	9%	3.0%	3.5%	2780.5	2999.9	299.1	337.6	305.2	337.7
Berkeley Group	3624.00	370.16	317.54	11.9	11.4	1.3	1.0	4%	6%	1.6%	3.3%	2486.5	2374.4	514.7	444.0	503.8	435.0
Breedon Group	369.00	31.45	33.73	11.7	10.9	6.4	5.8	4%	9%	4.1%	4.3%	1762.0	1842.4	164.5	177.6	287.6	305.5
Bytes Technology	414.20	25.75	27.00	16.1	15.3	11.8	10.1	7%	8%	7.5%	8.4%	222.1	248.3	72.7	79.7	74.2	83.4
C & C Group	165.80	0.12	0.12	15.9	16.1	8.9	9.2	3%	5%	3.3%	3.4%	1665.5	1713.6	77.2	81.6	112.0	115.2
Cairn Homes	2.05	0.20	0.23	10.1	9.1	6.5	6.4	4%	14%	4.4%	4.9%	961.1	1007.4	160.4	171.5	164.8	176.4
Coca-Cola HBC	3690.00	2.66	2.86	16.0	14.9	10.1	9.3	4%	4%	2.7%	3.0%	11597.4	12264.7	1337.9	1444.4	1748.7	1872.1
Compass Group	2568.00	1.31	1.43	26.7	24.4	15.5	14.5	3%	3%	1.9%	2.1%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
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	113.24	544.93	605.90	20.8	18.7	12.1	11.3	7%	8%	1.3%	1.4%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5
Dalata Hotel Group	6.40																
DCC	4756.00	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	24.00	1.30	1.72	25.1	19.0	5.6	4.6	8%	9%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	1846.50	1.66	1.72	18.0	14.6	12.1	11.6	6%	6%	3.5%	4.1%	20245.0	20581.4	5897.0	6124.6	7422.0	6735.5
Dole	13.68	129.83	141.67	10.5	9.7	4.9	4.4	7%	12%	2.5%	2.6%	8685.2	8802.1	283.7	296.5	393.1	408.0
easyJet	473.00	69.60	78.55	6.8	6.0	2.2	1.9	18%	10%	3.0%	3.3%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	865.20	45.45	66.86	19.0	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	58.30	11.35	17.65	5.1	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	14.10	1.66	FALSE	8.5	FALSE	1.2	FALSE			8.9%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	915.00	24.15	29.72	37.9	30.8	21.2	18.5	3%	4%	1.9%	2.0%	374.5	412.0	30.9	37.0	44.9	52.0
Flutter Entertainment	280.19	8.04	12.13	34.8	23.1	18.3	13.8	3%	4%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	192.00	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	408.00	587.49	849.11	0.7	0.5	4.1	3.7	5%	2%	0.0%	0.0%	90.6	96.6	5.7	9.1	36.0	38.4
Fuller, Smith & Turner	566.00	34.22	40.26	19.2	14.1	8.6	7.6	nm	5%	3.0%	3.8%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop Group	14750.00	525.16	561.13	28.1	26.3	17.5	16.3	4%	4%	3.1%	3.3%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	16.38	1.32	1.42	12.4	11.5	9.7	8.7	7%	8%	2.7%	3.0%	3871.8	3900.0	353.2	387.3	502.6	536.3
Glenveagh Properties	1.92	0.20	0.21	9.9	9.1	11.3	9.9	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9
Grafton Group	880.00	70.31	75.86	12.5	11.6	6.2	5.7	4%	7%	4.3%	4.5%	2525.1	2640.5	157.0	171.0	306.0	324.0
Greencoast Renewables	0.73	0.14	0.14	5.1	5.1	13.7	14.9	19%	19%	9.7%	10.2%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	243.50																
Grupos	1573.00	129.34	132.76	12.2	11.8	5.8	5.4	nm	4%	4.1%	4.2%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerson	287.00																
Heidelberg Materials	204.60	10.42	FALSE	19.6	FALSE	10.6	FALSE	4%	FALSE	1.2%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	114.50	0.11	0.15	11.8	9.1	7.5	5.5	10%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	828.50	46.32	50.52	17.9	16.4	9.8	9.2	4%	5%	2.9%	3.3%	2418.6	2512.5	340.3	365.0	498.8	528.4
JAG	384.00	0.66	0.75	6.7	5.9	2.9	2.5	16%	19%	2.7%	3.4%	3352.1	3443.7	4950.0	5227.8	7569.5	8103.3
JBstock	134.60	7.29	12.30	18.5	10.9	9.2	6.5	2%	11%	3.0%	4.6%	389.0	435.8	43.7	67.5	78.8	106.2
JCG	5.78	0.40	0.44	14.5	13.2	7.6	7.0	11%	4%	2.8%	3.0%	633.6	664.4	74.1	79.2	143.1	148.3
IRIS REIT	1.01	0.06	0.13	16.8	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	707.00	59.97	58.99	13.9	12.0	8.2	7.9	2%	4%	1.7%	1.7%	2117.8	2229.4	141.4	153.0	249.6	261.7
Jag2	1471.00	217.83	221.15	6.6	6.7	1.5	1.4	23%	15%	1.1%	1.4%	7173.5	7773.7	446.5	494.6	728.6	826.7
Kaines Group	885.50	30.50	36.18	29.0	24.5	17.7	14.8	5%	6%	2.8%	2.8%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	78.30	4.90	5.41	16.0	14.5	12.0	11.0	4%	5%	1.8%	2.0%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5
Kingfisher	243.30	20.41	19.97	12.9	12.2	5.5	5.0	10%	10%	4.7%	5.1%	12784.0	12842.4	628.0	608.8	1299.0	1272.8
Kingspan	68.85	3.83	4.15	18.0	16.6	12.1	11.3	5%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	7.44	1.14	1.29	6.5	5.8	6.8	6.2	19%	20%	4.6%	5.2%	39502.4	41427.8	2001.1	2229.4	3317.0	3622.3
Marston's	39.15	7.80	8.74	5.0	4.5	7.2	6.8	16%	17%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	268.50	28.53	29.75	9.4	9.0	6.4	6.1	7%	6%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5
Molten Ventures	360.80	48.11	47.64	7.5	7.6	6.9	7.1	10%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	996.40	0.96	1.21	11.9	9.5	7.1	6.1	1%	9%	5.6%	5.9%	8059.9	8683.9	702.8	839.2	1186.4	1351.5
NCC Group	143.00	5.53	7.09	25.8	20.2	9.5	8.4	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.87	0.52	0.54	7.5	7.2	6.3	5.9	nm	6%	4.4%	4.6%	2177.5	2256.2	79.6	83.8	111.3	117.1
Permanent TSB	2.32	0.08	0.21	30.5	10.8	0.6	0.5			0.9%	0.9%	653.5	693.8	128.5	172.3		
Persimmon	1092.00	93.59	104.31	11.7	10.5	0.9	0.9	nm	5%	3.7%	3.7%	3523.6	3758.4	444.9	489.6	467.4	514.9
Playtech	370.50	0.14	0.20	31.0	21.4	0.7	0.7	1%	3%	0.0%	0.0%	797.8	831.6	73.9	89.4	175.2	193.7
Rank Group	137.60	7.76	8.63	17.7	15.9	7.3	6.9	1%	1%	0.9%	1.0%	782.2	818.7	55.7	60.7	105.7	112.1
Ryanair	24.03	1.45	2.02	12.5	11.9	6.7	6.8	10%	9%	2.2%	1.8%	13948.5	15233.2	1558.0	2303.4	2772.4	3577.7
Smurfit Westrock	44.88	2.95	3.28	15.2	13.7	7.2	6.4										