

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	7.45	0.80	0.77	9.3	9.7	1.1	1.0			5.3%	5.5%	4428.2	4411.5	2087.0	2036.3				
Air France-KLM	12.21	6.42	5.79	1.9	2.1	3.4	3.1	52%	80%	0.0%	0.0%	33220.1	34529.6	1983.6	2122.4	4781.2	5066.2		
Applied Nutrition	161.00	9.12	10.12	17.6	15.9	12.4	10.7	4%	4%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3		
BAM European Value Ret	246.80	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	13.23	1.20	1.42	11.1	9.3	1.0	0.9			4.8%	5.2%	4099.0	4148.1	1687.2	1777.2				
Bakkavor Group	215.50																		
Barratt Redrow	366.20	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	2306.00	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	3650.00	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	356.20	31.45	33.73	11.3	10.6	6.2	5.6	5%	9%	4.3%	4.5%	1762.0	1842.4	164.5	177.6	287.6	305.5		
Bytes Technology	409.60	25.75	27.00	15.9	15.2	11.7	10.0	7%	8%	7.6%	8.5%	222.1	248.3	72.7	81.7	74.2	83.4		
C & C Group	162.40	0.12	0.12	15.9	15.7	8.9	9.0	3%	5%	3.3%	3.5%	1665.5	1713.6	77.2	79.6	112.0	115.2		
Cairn Homes	1.99	0.20	0.23	9.8	8.8	6.3	6.2	4%	15%	4.5%	5.0%	961.1	1007.4	160.4	171.5	164.8	176.4		
Coca-Cola HBC	3598.00	2.66	2.86	15.6	14.5	9.8	9.1	4%	5%	2.8%	3.0%	11597.4	12264.7	1337.9	1444.4	1748.7	1872.1		
Compass Group	2568.00	1.31	1.43	26.8	24.5	15.6	14.6	3%	3%	1.9%	2.0%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9		
Cranswick	5080.00	273.41	292.01	17.3	17.4	9.2	8.8	3%	3%	2.1%	2.1%	2723.3	2942.6	190.8	220.0	293.2	315.2		
CRH	112.53	544.93	605.90	20.7	18.6	12.0	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	4720.00	401.60	433.35	13.4	10.9	8.1	6.7	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	25.2	19.1	5.6	4.6	8%	9%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4		
Diageo	1841.00	1.66	1.72	18.0	14.6	12.1	11.7	6%	6%	3.5%	4.1%	20245.0	20581.4	5897.0	6124.6	7422.0	6735.5		
Dole	13.66	129.83	141.67	10.5	9.6	4.9	4.4	7%	12%	2.5%	2.6%	8685.2	8802.1	283.7	296.5	393.1	408.0		
easyJet	457.20	69.60	78.55	6.6	5.8	2.1	1.9	19%	10%	3.1%	3.4%	10165.0	10841.7	671.9	829.1	1452.4	1688.7		
Entain	862.00	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	57.00	11.35	17.65	5.0	3.2	5.4	4.6	30%	42%	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			9.0%	FALSE	422.9	FALSE	56.6	FALSE				
Fever-Tree Drinks	884.00	24.15	29.72	36.6	29.7	20.4	17.8	4%	4%	2.0%	2.1%	374.5	412.0	30.9	37.0	44.9	52.0		
Flutter Entertainment	276.54	8.04	12.13	34.4	22.8	18.1	13.7	3%	4%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7		
Forterra	192.20	13.07	14.50	14.7	13.3	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	562.00	34.22	40.26	19.2	14.0	8.6	7.6	nm	5%	3.0%	3.9%	376.3	394.6	47.2	42.4	67.6	70.1		
Games Workshop Group	14600.00	525.16	561.13	27.8	26.0	17.4	16.1	4%	4%	3.2%	3.4%	586.6	630.0	229.1	244.3	270.3	289.8		
Glanbia	16.52	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	1.93	0.20	0.21	9.9	9.2	11.4	9.9	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9		
Grafton Group	875.00	70.31	75.86	12.4	11.5	6.2	5.7	4%	7%	4.3%	4.6%	2525.1	2640.5	157.0	171.0	306.0	324.0		
Greencoast Renewables	0.72	0.14	0.14	5.0	5.0	13.6	14.9	19%	20%	9.8%	10.3%	216.6	215.4	189.2	187.9	189.2	187.9		
Greencore	240.00																		
Greggs	1572.00	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		
Hammons	283.00																		
Heidelberg Materials	199.80	10.42	FALSE	19.2	FALSE	10.4	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	115.50	0.11	0.15	11.9	9.2	7.5	5.5	9%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0		
Howden Joinery	830.00	46.32	50.52	17.9	16.4	9.8	9.3	4%	5%	2.9%	3.3%	2418.6	2512.3	340.3	365.0	498.8	528.4		
JAG	380.40	0.66	0.75	6.6	5.8	2.9	2.5	16%	20%	2.7%	3.4%	3352.1	34437.3	4950.0	5227.8	7569.5	8103.3		
JBstock	135.20	7.29	12.30	18.5	11.0	9.2	6.5	2%	11%	3.0%	4.6%	389.0	435.8	43.7	67.5	78.8	106.2		
JCG	5.84	0.40	0.44	14.6	13.3	7.6	7.0	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	16.4	7.4	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	701.50	59.97	58.99	13.8	11.9	8.2	7.8	2%	4%	1.7%	1.7%	2117.8	2229.4	141.4	153.0	249.6	261.7		
Jag2	1437.00	217.83	221.15	6.6	6.5	1.5	1.3	23%	15%	1.1%	1.4%	7173.5	7773.7	446.5	494.6	728.6	826.7		
Kainos Group	870.00	30.50	36.18	28.5	24.0	17.3	14.5	5%	6%	2.8%	2.8%	365.1	382.2	47.2	56.1	54.1	64.0		
Kerry Group	77.90	4.90	5.41	15.9	14.4	12.0	10.9	4%	5%	1.8%	2.0%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5		
Kingfisher	246.00	20.41	19.97	12.9	12.3	5.5	5.0	10%	10%	4.7%	5.0%	12784.0	12842.4	628.0	608.8	1299.0	1272.8		
Kingspan	67.65	3.83	4.15	17.7	16.3	11.9	11.1	5%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1		
Lufthansa	7.40	1.14	1.29	6.5	5.8	6.7	6.2	19%	20%	4.6%	5.2%	39502.4	41427.8	2001.1	2229.4	3317.0	3622.3		
Marston's	38.40	7.80	8.74	4.9	4.4	7.2	6.7	16%	17%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2		
Mitchells & Butlers	271.50	28.53	29.75	9.5	9.1	6.5	6.2	7%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5		
Molten Ventures	349.80	48.11	47.64	7.3	7.3	6.7	6.9	10%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3		
Mondi	1007.50	0.96	1.21	12.0	9.6	7.1	6.1	1%	9%	5.6%	5.9%	8059.9	8683.9	702.8	839.2	1186.4	1351.5		
NCC Group	142.60	5.53	7.09	25.8	20.1	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	2.25	0.08	0.21	29.6	10.5	0.6	0.5			0.9%	3.1%	653.5	693.8	128.5	172.3				
Persimmon	1092.50	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	364.50	0.14	0.20	30.4	21.0	0.7													