

Goodbody Market Commentary Metrics



18 July 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	2025	2026
AIB Group	6.73	0.75	0.78	8.9	8.6	1.0	0.9			5.7%	6.2%	4433.5	4399.4	2114.3	2022.1				
Air France-KLM	11.11	4.76	5.68	2.3	2.0	3.5	3.1	56%	88%	0.0%	0.0%	33182.7	34540.1	1875.2	2137.1	4672.6	5030.7		
Applied Nutrition	129.00	8.57	9.66	15.0	13.4	10.6	8.9	4%	5%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6		
B&M European Val	232.50	34.42	34.55	11.9	6.7	8.2	5.4	7%	13%	3.7%	6.5%	5571.0	5892.5	527.0	536.5	619.0	629.9		
Bank of Ireland	12.13	1.24	1.46	9.8	8.3	0.9	0.8			5.3%	5.7%	4023.1	4117.0	1670.9	1740.2				
Bakkavor Group	216.50																		
Barratt Redrow	377.30	30.44	34.82	12.4	10.8	0.6	0.7	7%	14%	4.2%	4.5%	5559.7	6075.9	601.6	720.8	614.4	726.6		
Bellway	2538.00	171.59	198.95	14.8	12.8	0.8	0.8	3%	5%	2.6%	3.2%	2759.5	3010.1	297.9	339.7	339.7	339.8		
Berkeley Group	3616.00	370.16	317.54	11.9	11.4	1.3	1.0	4%	6%	1.6%	3.4%	2486.5	2374.4	514.7	444.0	503.8	435.0		
Breedon Group	388.80	33.99	41.15	11.4	9.4	5.9	4.9	7%	10%	3.9%	4.1%	1801.5	1939.2	174.1	206.9	294.4	335.4		
Bytes Technology	340.00	25.75	27.00	13.2	12.6	9.4	8.0	8%	9%	9.2%	10.3%	222.1	248.3	72.7	81.7	74.2	83.4		
C & C Group	171.40	0.12	0.12	15.9	16.6	8.9	9.4	3%	5%	3.3%	3.3%	1665.5	1713.6	77.2	79.6	112.0	115.2		
Cairn Homes	2.23	0.20	0.23	11.0	9.9	7.2	7.0	4%	13%	4.0%	4.5%	961.1	1007.4	160.4	171.5	164.8	176.4		
Coca-Cola HBC	3952.00	2.55	2.76	17.9	16.6	10.8	10.1	3%	4%	2.6%	2.8%	11652.6	12299.1	1315.8	1418.3	1733.7	1847.1		
Compass Group	2493.00	1.30	1.43	25.8	23.4	15.0	14.0	3%	3%	1.9%	2.1%	45142.2	48542.0	3264.4	3539.6	4325.4	4639.3		
Cranswick	5210.00	273.41	292.01	17.3	17.8	9.2	9.0	3%	3%	2.1%	2.0%	2723.3	2942.6	190.8	220.0	293.2	315.2		
CRH	92.94	553.35	632.99	16.8	14.7	10.2	9.5	9%	10%	1.6%	1.7%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0		
Dalata Hotel Group	6.39																		
Datalex	0.35	-0.01	0.00	nm	453.1	247.0	26.9	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7		
DCC	4704.00	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	23.00	1.30	1.72	23.7	18.0	5.1	4.2	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4		
Diageo	1913.50	1.63	1.69	15.8	15.2	12.7	12.1	4%	5%	4.0%	4.0%	20177.6	20867.1	5920.6	6165.1	6399.1	6633.2		
Dole	13.95	129.83	141.67	10.7	9.8	5.0	4.5	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5	393.1	408.0		
easyJet	500.00	76.39	80.78	6.5	6.2	2.0	1.9	19%	12%	2.9%	3.1%	10285.0	10762.9	806.4	851.7	1640.5	1752.8		
Entain	955.40	45.45	66.86	21.0	14.3	9.3	8.6	5%	6%	2.1%	2.2%	5280.4	5459.4	708.9	856.0	1106.1	1186.4		
Evoke	64.60	11.35	17.65	5.7	3.7	5.5	4.7	26%	37%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2		
FBD Holdings	13.70	1.66	FALSE	8.3	FALSE	1.2	FALSE			9.1%	FALSE	422.9	FALSE	56.6	FALSE				
Fever-Tree Drinks	902.00	24.15	29.72	37.3	39.4	20.9	18.2	4%	4%	2.0%	2.1%	374.5	412.0	30.9	37.0	44.9	52.0		
FD Technologies	2450.00																		
Flutter Entertainment	300.78	9.08	13.07	33.1	23.0	18.1	13.9	3%	4%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	9400.1	4373.5		
Forterra	195.60	10.88	14.00	18.0	14.0	8.2	6.6	8%	11%	2.5%	3.5%	373.6	404.9	39.3	48.1	61.3	72.0		
Frontier Developm	369.00	587.49	849.11	0.6	0.4	3.4	3.0	5%	6%	0.0%	0.0%	90.1	96.7	8.2	10.3	40.8	44.1		
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	16260.00	542.36	571.01	30.0	28.5	18.8	17.7	3%	4%	2.8%	3.0%	601.2	641.3	236.7	248.7	277.8	294.1		
Glanbia	14.87	1.27	1.42	11.7	10.5	9.0	8.0	7%	9%	3.0%	3.3%	3836.5	3938.2	343.8	381.9	491.1	530.6		
Glenveagh Proper	1.86	0.20	0.21	9.5	8.8	11.0	9.6	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9		
Grafton Group	916.40	69.97	77.75	13.1	11.8	6.4	5.8	4%	6%	4.1%	4.4%	2528.5	2633.1	159.3	176.4	309.3	330.4		
Greencoat Renewa	0.78	0.14	0.14	5.4	5.4	14.0	15.2	18%	18%	9.1%	9.5%	216.6	215.4	189.2	187.9	189.2	187.9		
Greencore	234.50																		
Greggs	1723.00	129.34	132.76	13.3	13.0	6.2	5.8	nm	4%	3.8%	3.9%	2171.5	2354.7	190.6	199.2	354.9	384.5		
Hammerston	288.00																		
Heidelberg Matera	198.75	10.42	FALSE	19.1	FALSE	10.3	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	129.50	0.11	0.15	13.4	10.3	8.5	6.4	8%	11%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0		
Howden Joinery	819.50	46.31	51.01	17.7	16.1	9.7	9.2	5%	5%	2.9%	3.4%	2346.0	2433.2	341.3	367.9	499.6	529.3		
IAG	384.00	0.56	0.68	8.0	6.6	3.3	2.8	11%	16%	2.7%	3.4%	33203.3	34415.3	4332.3	4793.8	6951.7	7647.8		
Ibstock	150.20	8.23	11.39	18.3	13.2	9.6	7.4	3%	9%	2.7%	3.8%	393.5	440.9	45.6	62.7	81.0	101.9		
ICG	5.62	0.38	0.41	14.8	13.6	7.3	6.6	12%	5%	2.9%	3.0%	641.4	661.0	74.0	79.5	143.0	148.5		
IBES REIT	1.01	0.06	0.13	16.9	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	773.00	50.97	58.99	15.2	13.1	8.6	8.2	2%	4%	1.6%	1.6%	2117.8	2229.4	141.4	153.0	249.6	261.7		
Jet2	1652.00	184.35	184.43	9.0	9.0	1.9	1.5	15%	13%	0.3%	1.1%	7366.6	8055.8	469.1	493.1	749.2	825.5		
Kainos Group	734.00	30.50	36.18	24.1	20.3	14.3	11.9	6%	7%	3.3%	3.4%	365.1	382.2	47.2	56.1	54.1	64.0		
Kerry Group	90.25	4.94	5.41	18.3	16.7	14.1	13.0	4%	5%	1.5%	1.7%	7035.3	7213.2	945.2	1017.3	1247.9	1321.9		
Kingfisher	277.90	20.41	19.65	12.9	14.1	5.5	5.7	10%	8%	4.7%	4.5%	12784.0	12889.1	628.0	608.3	1299.0	1276.0		
Kingspan	71.70	4.00	4.42	17.9	16.2	12.0	10.7	5%	5%	0.8%	0.9%	9378.8	9865.8	927.0	1014.4	1235.0	1334.4		
Lufthansa	7.49	1.06	1.24	7.1	6.0	7.0	6.4	18%	19%	4.0%	4.0%	39806.8	41731.0	1883.0	2163.6	3198.9	3533.3		
Marston's	44.25	7.80	8.74	5.7	5.1	7.4	6.9	14%	15%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2		
Mitchells & Butlers	279.00	28.53	29.75	9.8	9.4	6.6	6.3	7%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5		
Molten Ventures	349.60	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	1167.50	1.04	1.36	13.0	9.9	7.5	6.3	4%	10%	4.8%	5.0%	7802.2	8299.0	744.0	928.7	1212.2	1418.3		
NCC Group	147.20	5.53	7.09	26.6	20.8	9.8	8.6	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9		
Origin Enterprises	3.80	0.52	0.57	7.4	6.7	6.3	5.8	nm	9%	4.5%	4.7%	2189.6	2252.6	78.9	83.8	110.8	117.3		
Permanent TSB	2																		