

Goodbody Market Commentary Metrics



20 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	7.38	0.80	0.77	9.2	9.6	1.1	1.0			5.4%	5.5%	4428.2	4411.5	2087.0	2036.3		
Air France-KLM	14.75	6.42	5.79	2.3	2.5	3.5	3.2	43%	67%	0.0%	0.0%	33220.1	34529.6	1983.6	2172.4	4781.2	5066.2
Applied Nutrition	146.80	9.12	10.12	16.1	14.5	11.3	9.7	4%	5%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3
BAM European Val	233.70	34.42	34.55	11.9	6.8	8.2	5.4	7%	13%	3.7%	6.4%	5571.0	5892.5	527.0	536.5	619.0	629.9
Bank of Ireland	13.16	1.20	1.42	11.0	9.3	1.0	0.9			4.9%	5.2%	4099.0	4148.1	1687.2	1777.2		
Bakkavor Group	236.00																
Barratt Redrow	377.00	35.48	29.14	10.6	12.9	0.7	0.7	nm	6%	4.2%	4.5%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2468.00	172.35	197.69	14.3	12.5	0.8	0.8	4%	9%	2.8%	3.2%	2780.5	2999.9	299.1	337.6	305.2	337.7
Berkeley Group	3728.00	370.16	317.54	11.9	11.7	1.3	1.0	4%	6%	1.6%	3.3%	2486.5	2374.4	514.7	444.0	503.8	435.0
Bresdon Group	372.20	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
Bytes Technology	390.00	25.75	27.00	15.1	14.4	11.0	9.4	7%	8%	8.0%	9.0%	222.1	248.2	72.7	81.7	74.2	82.4
C & C Group	179.00	0.12	0.12	15.9	17.3	8.9	9.7	3%	4%	3.3%	3.1%	1665.5	1713.6	77.2	79.6	112.0	115.2
Cairn Homes	2.24	0.20	0.23	11.0	9.9	7.2	7.1	4%	13%	4.0%	4.5%	961.1	1007.4	160.4	171.5	164.8	176.4
Coca-Cola HBC	3930.00	2.66	2.86	17.1	15.9	10.7	9.8	4%	4%	2.5%	2.8%	11597.4	12264.7	1337.9	1444.4	1748.7	1872.1
Compass Group	2601.00	1.31	1.43	26.8	24.6	15.6	14.6	3%	3%	1.9%	2.0%	45297.2	48451.7	3291.0	3540.3	4355.6	4637.9
Cranswick	5230.00	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	112.44	553.90	633.97	20.3	17.7	12.0	11.0	8%	9%	1.3%	1.4%	37512.9	39301.7	5607.1	6196.0	7445.4	8061.6
Dalata Hotel Group	6.38																
Datalex	0.25																
DCC	4780.00	401.60	439.84	13.4	10.9	8.1	6.7	8%	12%	3.8%	4.5%	18011.1	17462.1	439.6	530.6	784.0	797.0
Devolver Digital	23.50	1.30	1.72	24.4	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	2094.00	1.66	1.72	18.0	16.5	12.1	12.7	6%	5%	3.5%	3.7%	20245.0	20581.4	5897.0	6124.6	7427.0	6735.5
Dole	14.29	129.83	141.67	11.0	10.1	5.0	4.6	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5	393.1	408.0
easyJet	518.60	69.60	78.55	7.5	6.6	2.4	2.1	16%	9%	2.7%	3.0%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	880.40	45.45	66.86	19.4	13.2	8.8	8.2	5%	6%	2.2%	2.3%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	59.60	11.35	17.65	5.3	3.4	5.5	4.7	28%	40%	0.0%	0.0%	1847.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	14.50	1.66	FALSE	8.7	FALSE	1.2	FALSE			8.6%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	943.00	24.15	29.72	39.0	31.7	21.9	19.2	3%	3%	1.9%	2.0%	374.5	412.0	30.9	37.0	44.9	52.0
Flutter Entertainment	293.81	8.04	12.13	36.5	24.2	19.0	14.4	3%	4%	0.0%	0.0%	16999.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	192.80	13.07	14.50	14.8	13.3	8.1	6.4	6%	11%	3.0%	3.5%	380.9	413.7	41.4	49.9	62.4	74.2
Frontier Developm	371.00	587.49	849.11	0.6	0.4	3.7	3.1	4%	5%	0.0%	0.0%	90.6	96.6	5.7	9.1	38.3	43.0
Fuller, Smith & T	556.00	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	15650.00	525.16	561.13	29.8	27.9	18.6	17.3	3%	4%	3.0%	3.1%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	16.67	1.32	1.42	12.6	11.7	9.9	8.8	7%	8%	2.7%	3.0%	3871.8	3900.0	353.2	387.3	502.6	536.3
Glenveagh Propert	1.96	0.20	0.21	10.1	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	891.10	69.97	77.75	12.7	11.5	6.2	5.7	4%	7%	4.3%	4.5%	2528.5	2633.1	159.3	176.4	309.3	330.4
Greencore Renewa	0.75	0.14	0.14	5.2	5.2	13.7	15.0	19%	10%	9.5%	10.0%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	253.00																
Greggs	1618.00	129.34	132.76	12.5	12.2	5.9	5.5	nm	4%	4.0%	4.1%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerson	292.00																
Heidelberg Matera	207.50	10.42	FALSE	19.9	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	9.3	7.6	5.6	9%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	877.00	46.32	50.52	18.9	17.4	10.3	9.7	4%	5%	2.7%	3.1%	2418.6	2512.5	340.3	365.0	498.8	528.4
JAG	393.90	0.66	0.75	6.9	6.1	3.0	2.6	15%	19%	2.6%	3.3%	33522.1	34437.3	4950.0	5227.8	7569.5	8103.3
Ibstock	143.00	7.29	12.30	19.6	11.6	9.6	6.8	2%	10%	2.8%	4.3%	289.0	435.8	43.7	67.5	78.8	106.3
ICG	5.60	0.40	0.44	14.0	12.8	7.3	6.8	12%	4%	2.9%	3.1%	633.6	664.4	74.1	79.3	143.1	148.3
IRIS REIT	0.98	0.06	0.13	16.3	7.3	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	736.50	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	1656.00	217.83	221.15	6.6	7.5	1.5	1.9	23%	13%	1.1%	1.2%	7173.5	7773.7	446.5	494.6	728.6	826.7
Kainos Group	694.00	30.50	36.18	22.8	19.2	13.4	11.2	6%	7%	3.5%	3.5%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	80.45	4.90	5.41	16.4	14.9	12.3	11.3	4%	5%	1.7%	1.9%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5
Kingfisher	277.50	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	72.15	3.83	4.15	18.8	17.4	12.6	11.8	4%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	8.35	1.14	1.29	7.3	6.5	7.1	6.5	17%	18%	4.1%	4.6%	39502.4	41427.8	2001.1	2229.4	3317.0	3622.3
Marston's	39.55	7.80	8.74	5.1	4.5	7.3	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	368.60	48.11	47.64	7.7	7.7	7.0	7.3	9%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	1076.00	0.96	1.21	12.9	10.3	7.4	6.4	1%	9%	5.2%	5.5%	8059.9	8683.9	702.8	839.2	1186.4	1351.5
NCC Group	144.00	5.53	7.09	26.0	20.3	9.6	8.4	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.74	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	2.29	0.08	0.21	30.2	10.7	0.6	0.5			0.9%	3.1%	653.5	693.8	128.5	172.3		
Persimmon	1130.00	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	424.00	0.12	0.20	41.4	24.5	0.8	0.8	1%	2%	0.0%	0.0%	797.8	831.6	65.4	89.4	166.7	193.7
Rank Group	136.60	7.76	8.63	17.6	15.8	7.3	6.9	1%	1%	0.9%	1.0%	782.2	818.7	55.7	60.7	105.7	112.1
Ryanair	26.98	1.45	2.02	12.5	13.4	6.7	7.8	10%	8%	2.2%	1.6%	13948.5	15233.2	1558.0	2303.4	2772.4	3577.7
Smurfit Westrock	43.41	2.95	3.28	14.7	13.2	7.1	6.3	5%	8%	4.0%	4.2%	31378.3	32808.0	2453.2	2905.7	5120.3	5664.4
SSP Group	165.30	11.63	13.50	14.2	12.2	7.1	6.3	nm	2%	2.5%	2.9%	3690.9	3890.4	274.2	297.5	571.6	650.8
Tate & Lyle	538.00	49.71	44.88	13.2	12.0	10.2	8.1	7%	8%	3.0%	3.7%	1736.4	2145.1	287.8	317.3	380.8	455.4
Taylor Wimpey	100.75	8.00	9.30	12.6	10.8	0.8	0.9	3%	10%	9.3%	9.9%	3767.6	4015.1	428.1	490.5	435.6	497.2
Everplay Group	377.00	25.11	25.30	15.0	14.9	6.4	6.0	4%	5%	0.0%	0.0%	175.9	176.4	33.4	33.8	67.2	67.0
Travis Perkins	622.00	49.14	60.01	12.7	10.4	6.1	5.5	7%	7%	3.7%	4.5%	4697.5	4874.0	161.4	196.2	354.3	391.5
Trustpilot Group	219.80	0.03	0.05	85.5	57.3	46.4	30.4	2%	3%	0.0%	0.0%	241.6	276.5	15.6	29.8	24.2	37.2
Uniphar	4.05	0.22	0.24	18.4	17.1	9.9	9.1	6%	7%	0.5%	0.4%	2890.7	2981.4	97.1	107.0	133.0	143.3
Vistry Group	644.40																
WH Smith	1117.00	76.14	81.60	1													