

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	7.19	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	14.50	6.42	5.79	2.3	2.5	3.5	3.2	44%	68%	0.0%	0.0%	33220.1	34529.6	1983.6	2172.4	4781.2	5066.2
Applied Nutrition	153.00	9.12	10.12	16.8	15.1	11.8	10.1	4%	4%	0.0%	0.0%	107.0	121.3	29.8	33.2	30.9	34.3
B&M European Val	236.80	34.42	34.55	11.9	6.9	8.2	5.4	7%	13%	3.7%	6.3%	5571.0	5892.5	527.0	536.5	619.0	629.9
Bank of Ireland	13.15	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	240.00																
Barratt Redrow	371.10	35.48	29.14	10.5	12.7	0.7	0.7	nm	6%	4.3%	4.6%	5582.9	5859.2	553.6	600.5	667.9	609.1
Bellway	2424.00	172.35	197.69	14.1	12.3	0.8	0.8	4%	9%	2.9%	3.3%	2780.5	2999.9	299.1	337.6	305.2	337.7
Berkeley Group	3712.00	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
Breedon Group	366.20	31.45	33.73	11.6	10.9	6.3	5.8	4%	9%	4.2%	4.4%	1762.0	1842.4	164.5	177.6	287.6	305.5
Bytes Technology	397.00	25.75	27.00	15.4	14.7	11.2	9.6	7%	8%	7.9%	8.8%	222.1	248.3	72.7	81.7	74.2	83.4
C & C Group	174.40	0.12	0.12	15.9	16.9	8.9	9.5	3%	4%	3.3%	3.2%	1665.5	1713.6	77.2	79.6	112.0	115.2
Cairn Homes	2.21	0.20	0.23	10.9	9.8	7.1	7.0	4%	13%	4.1%	4.5%	961.1	1007.4	160.4	171.5	164.8	176.4
Coca-Cola HBC	3944.00	2.66	2.86	17.1	15.9	10.7	9.9	4%	4%	2.5%	2.8%	11597.4	12264.7	1337.9	1444.4	1748.7	1872.1
Compass Group	2610.00	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	5290.00	273.41	292.01	17.3	18.1	9.2	9.1	3%	3%	2.1%	2.0%	2723.3	2942.6	190.8	220.2	293.2	315.2
CRH	110.72	544.93	605.90	20.3	18.3	11.8	11.1	7%	8%	1.3%	1.4%	37776.0	39400.2	5507.1	5971.7	7545.7	8025.5
Dalata Hotel Group	6.38																
Datalex	0.25																
DCC	4784.00	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	24.3	18.4	5.3	4.3	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	2116.00	1.66	1.72	18.0	16.6	12.1	12.7	6%	5%	3.5%	3.6%	20245.0	20581.4	5897.0	6124.6	7427.0	6735.5
Dole	14.41	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	502.80	69.60	78.55	7.2	6.4	2.3	2.1	17%	10%	2.8%	3.1%	10165.0	10841.7	671.9	829.1	1452.4	1688.7
Entain	877.20	45.45	66.86	19.3	13.1	8.8	8.2	5%	6%	2.2%	2.4%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	58.80	11.35	17.65	5.2	3.3	5.5	4.7	29%	41%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FRD Holdings	14.50	1.66	FALSE	8.7	FALSE	1.2	FALSE			8.6%	FALSE	422.9	FALSE	56.6	FALSE		
Fever-Tree Drinks	844.00	24.15	29.72	34.9	28.4	19.4	16.9	4%	4%	2.1%	2.2%	374.5	412.0	30.9	37.0	44.9	52.0
Flutter Entertainm	294.60	8.04	12.13	36.6	24.3	19.0	14.4	3%	4%	0.0%	0.0%	16989.8	19754.4	2636.0	3538.5	3247.6	4249.7
Forterra	191.60	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 Developm	381.00	587.49	849.11	0.6	0.4	3.8	3.2	3%	5%	0.0%	0.0%	90.6	96.6	5.7	9.1	38.3	43.0
Fuller, Smith & Tu	560.00	34.22	40.26	19.2	13.9	8.6	7.6	nm	5%	3.0%	3.9%	376.3	394.6	47.2	42.4	67.6	70.1
Games Workshop	15830.00	525.16	561.13	30.1	28.2	18.8	17.5	3%	4%	2.9%	3.1%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	16.57	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 Propert	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	890.70	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
Greencoat Renewa	0.74	0.14	0.14	5.1	5.1	13.7	15.0	19%	19%	9.6%	10.1%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	256.00																
Greggs	1590.00	129.34	132.76	12.3	12.0	5.8	5.5	nm	4%	4.1%	4.2%	2171.5	2354.7	190.6	199.2	354.9	384.5
Hammerson	289.20																
Heidelberg Matera	201.20	10.42	FALSE	19.3	FALSE	10.4	FALSE	4%	FALSE	1.2%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	119.00	0.11	0.15	12.3	9.5	7.8	5.7	9%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0
Howden Joinery	868.00	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	385.80	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	138.20	7.29	12.30	19.0	11.2	9.3	6.6	2%	11%	2.9%	4.5%	389.0	435.8	43.7	67.5	78.8	106.3
ICG	5.56	0.40	0.44	13.9	12.7	7.3	6.7	12%	4%	2.9%	3.1%	633.6	664.4	74.1	79.3	143.1	148.3
IRIS REIT	0.96	0.06	0.13	16.0	7.2	0.7	0.0	2%	3%	4.9%	5.2%	65.7	67.6	54.7	92.0	52.0	89.4
J.D. Wetherspoon	721.00	50.97	58.99	14.1	12.2	8.3	7.9	2%	4%	1.7%	1.7%	2117.8	2229.4	141.4	153.0	249.6	261.7
Jet2	1624.00	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	716.00	30.50	36.18	23.5	19.8	13.9	11.6	6%	7%	3.4%	3.4%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	81.20	4.90	5.41	16.6	15.0	12.4	11.4	4%	5%	1.7%	1.9%	6931.2	7106.6	938.4	1017.0	1241.0	1321.5
Kingfisher	279.20	20.41	19.65	12.9	14.2	5.5	5.7	10%	8%	4.7%	4.4%	12784.0	12889.1	628.0	608.3	1299.0	1276.0
Kingspan	68.65	3.83	4.15	17.9	16.6	12.0	11.3	5%	5%	0.8%	0.9%	9255.4	9514.6	896.6	947.1	1214.6	1287.1
Lufthansa	8.14	1.14	1.29	7.1	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	38.90	7.80	8.74	5.0	4.4	7.2	6.8	16%	17%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2
Mitchells & Butlers	266.50	28.53	29.75	9.3	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	366.60	48.11	47.64	7.6	7.7	7.0	7.2	10%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3
Mondi	1060.00	0.96	1.21	12.7	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	145.20	5.53	7.09	26.2	20.5	9.7	8.5	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.75	0.52	0.57	7.3	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	2.25	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	1103.00	93.59	104.31	11.8	10.6	1.0	0.9	nm	5%	3.6%	3.6%	3523.6	3758.4	444.9	489.6	467.4	514.9
Playtech	420.50	0.12	0.20	41.1	24.3	0.8	0.8	1%	2%	0.0%	0.0%	797.8	831.6	65.4	89.4	166.7	193.7
Rank Group	136.00	7.76	8.63	17.5	15.8	7.3	6.8	1%	1%	0.9%	1.0%	782.2	818.7	55.7	60.7	105.7	112.1
Ryanair	26.32	1.45	2.02	12.5	13.0	6.7											