

Goodbody Market Commentary Metrics



June 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	6.90	0.75	0.78	9.2	8.9	1.0	0.9			5.5%	6.1%	4433.5	4399.4	2114.3	2022.1				
Air France-KLM	9.08	4.80	5.60	1.9	1.6	3.4	3.0	69%	107%	0.0%	0.0%	33158.0	34514.6	1888.0	2114.7	4685.1	5008.0		
Applied Nutrition	125.60	8.57	9.66	14.6	13.0	10.3	8.6	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6		
B&M European Val	271.20	34.42	34.55	11.9	7.8	8.2	6.0	7%	11%	3.7%	5.5%	5571.0	5892.5	527.0	536.5	619.0	629.9		
Bank of Ireland	12.03	1.24	1.46	9.7	8.2	0.9	0.8			5.3%	5.7%	4023.1	4117.0	1670.9	1740.2				
Bakkavor Group	223.00																		
Barratt Redrow	473.90	30.44	34.82	15.6	13.6	0.8	0.8	6%	11%	3.4%	3.6%	5559.7	6075.9	601.6	720.8	614.4	726.6		
Bellway	2980.00	171.59	198.95	17.4	15.0	1.0	0.9	2%	5%	2.2%	2.7%	2759.5	3010.1	297.9	339.7	303.9	339.8		
Berkeley Group	3910.00	285.85	292.86	13.7	13.4	1.2	1.2	8%	6%	6.7%	6.7%	2383.5	2452.6	467.1	478.8	443.8	455.8		
Breedon Group	390.80	33.99	41.15	11.5	9.5	6.0	5.0	7%	10%	3.9%	4.1%	1801.5	1939.2	174.1	206.9	294.4	335.4		
Bytes Technology	509.00	25.75	27.00	19.8	18.9	14.9	12.8	5%	6%	6.1%	6.9%	222.1	248.3	72.7	81.7	74.2	83.4		
C & C Group	169.00	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	2.18	0.20	0.23	10.7	9.7	7.0	6.9	4%	13%	4.1%	4.6%	961.1	1007.4	160.4	171.5	164.8	176.4		
Coca-Cola HBC	3768.00	2.56	2.78	17.2	15.9	10.4	9.7	4%	4%	2.7%	3.0%	11654.6	12355.2	1321.6	1427.8	1739.7	1858.6		
Compass Group	2500.00	1.27	1.39	26.9	24.7	15.6	14.7	3%	3%	1.9%	2.0%	44276.1	46981.4	3212.6	3446.7	4253.3	4511.0		
Cranswick	5390.00	273.41	292.01	17.3	18.5	9.2	9.3	3%	3%	2.1%	2.0%	2723.3	2942.6	190.8	220.0	293.2	315.2		
CRH	91.52	553.35	632.99	16.5	14.5	10.1	9.4	9%	11%	1.6%	1.7%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0		
Dalata Hotel Group	6.36																		
Datalex	0.32	-0.01	0.00	nm	419.0	227.7	24.8	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7		
DCC	4748.00	477.33	465.63	9.9	10.2	6.1	6.2	10%	12%	4.3%	4.6%	20507.9	19924.2	597.1	545.5	958.4	885.8		
Devolver Digital	23.00	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	1834.50	1.63	1.70	15.4	14.8	12.5	11.9	5%	6%	4.1%	4.1%	20225.8	21000.0	5931.6	6208.3	6411.8	6682.0		
Dole	13.84	129.83	141.67	10.7	9.8	4.9	4.5	7%	12%	2.5%	2.6%	8685.2	8802.1	283.7	296.5	393.1	408.0		
easyJet	532.40	76.39	80.78	7.0	6.6	2.2	2.0	18%	11%	2.7%	2.9%	10285.0	10762.9	806.4	851.7	1640.5	1752.8		
Entain	903.40	45.45	66.86	19.9	13.5	9.0	8.3	5%	6%	2.2%	2.3%	5280.4	5459.4	708.9	856.0	1106.1	1186.4		
Evoke	63.20	11.35	17.65	5.6	3.6	5.5	4.7	27%	38%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2		
FRD Holdings	13.80	1.66	FALSE	8.3	FALSE	1.2	FALSE			9.1%	FALSE	422.9	FALSE	56.6	FALSE				
Fever-Tree Drinks	930.00	24.15	29.72	38.5	31.3	21.6	18.9	3%	4%	1.9%	2.0%	374.5	412.0	30.9	37.0	44.9	52.0		
FD Technologies	2435.00																		
Flutter Entertainment	278.42	9.08	13.07	30.7	21.3	16.9	13.0	3%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	9400.1	4373.5		
Forterra	198.20	10.88	14.00	18.2	14.2	8.3	6.7	8%	11%	2.4%	3.4%	373.6	404.9	39.3	48.1	61.3	72.0		
Frontier Developm	314.00	587.49	849.11	0.5	0.4	2.9	2.5	6%	7%	0.0%	0.0%	90.1	96.7	8.2	10.3	40.8	44.1		
Fuller, Smith & Tu	592.00	34.22	40.26	19.2	14.7	8.6	7.8	nm	5%	3.0%	3.7%	376.3	394.6	47.2	42.4	67.6	70.1		
Games Workshop	16130.00	542.36	571.01	29.7	28.2	18.7	17.6	3%	4%	2.9%	3.0%	601.2	641.3	236.7	248.7	277.8	294.1		
Glanbia	15.28	1.27	1.42	12.1	10.8	9.2	8.2	7%	9%	2.9%	3.2%	3836.5	3938.2	343.8	381.9	491.1	530.6		
Glenveagh Proper	1.74	0.20	0.21	8.9	8.3	10.3	8.9	8%	16%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9		
Grafton Group	1025.40	69.84	77.34	14.7	13.3	7.0	6.4	4%	6%	3.7%	3.9%	2510.4	2601.8	159.3	176.0	309.3	330.0		
Greencoat Renewa	0.79	0.14	0.14	5.4	5.5	14.0	15.3	18%	18%	9.0%	9.5%	216.6	215.4	189.2	187.9	189.2	187.9		
Greencore	236.50																		
Greggs	1954.00	139.34	146.38	14.0	13.3	6.6	6.1	nm	4%	3.6%	3.7%	2189.2	2375.6	204.4	218.0	368.7	403.3		
Hammerston	303.60																		
Heidelberg Matera	199.60	10.42	FALSE	19.2	FALSE	10.3	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	137.00	0.11	0.15	14.3	11.1	9.2	6.9	8%	10%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0		
Howden Joinery	869.50	46.31	51.01	18.8	17.0	10.3	9.7	5%	5%	2.8%	3.2%	2346.0	2433.2	341.3	367.9	499.6	529.3		
IAG	379.30	0.56	0.68	7.1	5.9	3.1	2.6	12%	18%	3.0%	3.8%	33203.3	34415.3	4332.3	4793.8	6951.7	7647.8		
Ibstock	152.00	8.23	11.39	18.5	13.3	9.7	7.4	3%	9%	2.7%	3.8%	393.5	440.9	45.6	62.7	81.0	101.9		
ICG	5.64	0.38	0.41	14.8	13.7	7.3	6.6	12%	5%	2.9%	3.0%	641.4	661.0	74.0	79.5	143.0	148.5		
IBES REIT	1.04	0.14	FALSE	7.6	FALSE	67.5	0.0	4%	FALSE	5.4%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE		
J.D. Wetherspoon	773.50	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	1823.00	184.35	184.43	9.9	9.9	2.4	1.9	14%	12%	0.2%	1.0%	7366.6	8055.8	469.1	493.1	749.2	825.5		
Kainos Group	733.50	30.50	36.18	24.0	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	94.20	4.94	5.41	19.1	17.4	14.6	13.5	4%	4%	1.5%	1.6%	7035.3	7213.2	945.2	1017.3	1247.9	1321.9		
Kingfisher	288.70	20.41	19.65	12.9	14.7	5.5	5.8	10%	8%	4.7%	4.3%	12784.0	12889.1	628.0	608.3	1299.0	1276.0		
Kingspan	72.65	4.00	4.42	18.2	16.4	11.8	10.6	5%	5%	0.8%	0.9%	9375.0	9822.1	927.1	1013.4	1235.1	1333.4		
Lufthansa	7.15	1.07	1.26	6.7	5.7	7.1	6.4	18%	20%	4.2%	4.2%	39742.1	41642.7	1883.1	2153.1	3166.8	3489.1		
Marston's	42.10	7.80	8.74	5.4	4.8	7.3	6.9	15%	16%	0.0%	0.0%	916.7	941.4	159.2	166.3	202.7	210.2		
Mitchells & Butlers	287.50	28.53	29.75	10.1	9.7	6.7	6.4	6%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5		
Molten Ventures	333.40	48.11	47.64	6.9	7.0	6.4	6.6	10%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3		
Mondi	1211.50	1.04	1.36	13.6	10.4	7.7	6.5	3%	10%	4.6%	4.8%	7802.2	8299.0	744.0	928.7	1212.2	1418.3		
NCC Group	142.00	5.53	7.09	25.7	20.0	9.5	8.3	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9		
Origin Enterprises	3.73	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	2.00	0.12	0.22	17.0	9.0	0.5	0.4			1.0%	4.5%	654.2	694.6	146.4	173.2				
Persimmon	1347.00	94.75	110.68	14.2	12.2	1.2	1.1	3%	9%	3.0%	3.0%	3433.1							