

Goodbody Market Commentary Metrics



04 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	6.92	0.75	0.78	9.2	8.9	1.0	0.9			5.5%	6.0%	4433.5	4399.4	2114.3	2022.1				
Air France-KLM	9.90	4.80	5.60	2.1	1.8	3.4	3.1	63%	98%	0.0%	0.0%	33158.0	34514.6	1888.0	2114.7	4685.1	5008.0		
Applied Nutrition	124.00	8.57	9.66	14.5	12.8	10.2	8.5	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6		
B&M European Val	278.30	34.42	34.55	11.9	8.1	8.2	6.1	7%	11%	3.7%	5.4%	5571.0	5892.5	527.0	536.5	619.0	629.9		
Bank of Ireland	12.17	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	218.50																		
Barratt Redrow	433.80	30.44	34.82	14.3	12.5	0.7	0.8	6%	12%	3.7%	3.9%	5559.7	6075.9	601.6	720.8	614.4	726.6		
Bellway	2682.00	171.59	198.95	15.6	13.5	0.9	0.8	3%	5%	2.4%	3.0%	2759.5	3010.1	297.9	339.7	303.9	339.8		
Berkeley Group	3674.00	285.85	292.86	12.9	12.5	1.1	1.1	8%	6%	7.1%	7.1%	2383.5	2452.6	467.1	478.8	443.8	455.8		
Breedon Group	380.40	33.99	41.15	11.2	9.2	5.9	4.9	7%	10%	4.0%	4.2%	1801.5	1939.2	174.1	206.9	294.4	335.4		
Bytes Technology	349.80	25.75	27.00	13.6	13.0	9.7	8.3	8%	9%	8.9%	10.0%	222.1	248.3	72.7	81.7	74.2	83.4		
C & C Group	166.40	0.12	0.12	15.9	16.2	8.9	9.2	3%	5%	3.3%	3.4%	1665.5	1713.6	77.2	79.6	112.0	115.2		
Cairn Homes	2.11	0.20	0.23	10.4	9.3	6.7	6.6	4%	14%	4.3%	4.7%	961.1	1007.4	160.4	171.5	164.8	176.4		
Coca-Cola HBC	3964.00	2.55	2.76	18.0	16.7	10.9	10.1	3%	4%	2.6%	2.8%	11652.6	12299.1	1315.8	1418.3	1733.7	1847.1		
Compass Group	2504.00	1.30	1.43	26.3	23.9	15.3	14.3	3%	3%	1.9%	2.1%	45142.2	48542.0	3264.4	3539.6	4325.4	4639.3		
Cranswick	5310.00	273.41	292.01	17.3	18.2	9.2	9.1	3%	3%	2.1%	2.0%	2723.3	2942.6	190.8	220.0	293.2	315.2		
CRH	94.94	553.35	632.99	17.2	15.0	10.4	9.7	9%	10%	1.5%	1.6%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0		
Dalata Hotel Group	6.48																		
Datalex	0.33	-0.01	0.00	nm	436.0	237.3	25.9	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7		
DCC	4850.00	477.33	465.63	10.2	10.4	6.2	6.3	10%	12%	4.3%	4.5%	20507.9	19924.2	597.1	545.5	958.4	885.8		
Devolver Digital	23.00	1.30	1.72	24.1	18.3	5.3	4.3	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4		
Diageo	1912.00	1.63	1.70	16.0	15.3	12.8	12.2	4%	5%	4.0%	4.0%	20225.8	21000.0	5931.6	6208.3	6411.8	6682.0		
Dole	14.22	129.83	141.67	11.0	10.0	5.0	4.6	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5	393.1	408.0		
easyJet	531.60	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	916.40	45.45	66.86	20.2	13.7	9.0	8.4	5%	6%	2.1%	2.3%	5280.4	5459.4	708.9	856.0	1106.1	1186.4		
Evoke	64.80	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	13.65	1.66	FALSE	8.2	FALSE	1.2	FALSE			9.2%	FALSE	422.9	FALSE	56.6	FALSE				
Fever-Tree Drinks	938.00	24.15	29.72	38.8	31.6	21.8	19.1	3%	3%	1.9%	2.0%	374.5	412.0	30.9	37.0	44.9	52.0		
FD Technologies	2440.00																		
Flutter Entertainment	280.03	9.08	13.07	30.9	21.4	17.0	13.1	3%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5		
Forterra	192.80	10.88	14.00	17.7	13.8	8.1	6.5	8%	11%	2.5%	3.5%	373.6	404.9	39.3	48.1	61.3	72.0		
Frontier Developm	333.00	587.49	849.11	0.6	0.4	3.1	2.7	5%	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	15880.00	542.36	571.01	29.3	27.8	18.4	17.3	3%	4%	2.9%	3.1%	601.2	641.3	236.7	248.7	277.8	294.1		
Glanbia	15.25	1.27	1.42	12.0	10.7	9.2	8.2	7%	9%	3.0%	3.2%	3836.5	3938.2	343.8	381.9	491.1	530.6		
Glenveagh Proper	1.77	0.20	0.21	9.1	8.4	10.5	9.1	8%	16%	0.0%	0.0%	1005.2	1072.3	141.8	146.5	145.0	149.9		
Grafton Group	999.50	69.84	77.34	14.3	12.9	6.8	6.2	4%	6%	3.8%	4.0%	2510.4	2601.8	159.3	176.0	309.3	330.0		
Greencoat Renewa	0.78	0.14	0.14	5.4	5.4	13.9	15.2	18%	18%	9.1%	9.6%	216.6	215.4	189.2	187.9	189.2	187.9		
Greencore	233.00																		
Greggs	1700.00	139.34	146.38	12.2	11.6	5.9	5.4	nm	5%	4.1%	4.3%	2189.2	2375.6	204.4	218.0	368.7	403.3		
Hammerston	295.40																		
Heidelberg Matera	195.60	10.42	FALSE	18.8	FALSE	10.2	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	136.00	0.11	0.15	14.1	10.9	9.1	6.8	8%	10%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0		
Howden Joinery	849.00	46.31	51.01	18.3	16.6	10.1	9.5	5%	5%	2.8%	3.2%	2346.0	2433.2	341.3	367.9	499.6	529.3		
IAG	345.80	0.56	0.68	7.2	5.9	3.1	2.6	12%	18%	3.0%	3.7%	33203.3	34415.3	4332.3	4793.8	6951.7	7647.8		
Ibstock	146.20	8.23	11.39	17.8	12.8	9.4	7.2	3%	9%	2.8%	3.9%	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	1.01	0.14	FALSE	7.4	FALSE	65.9	0.0	4%	FALSE	5.5%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE		
J.D. Wetherspoon	778.00	50.97	58.99	15.3	13.2	8.6	8.2	2%	4%	1.5%	1.5%	2117.8	2229.4	141.4	153.0	249.6	261.7		
Jet2	1792.00	184.35	184.43	9.7	9.7	2.3	1.8	14%	12%	0.2%	1.0%	7366.6	8055.8	469.1	493.1	749.2	825.5		
Kainos Group	736.00	30.50	36.18	24.1	20.3	14.3	12.0	6%	7%	3.3%	3.3%	365.1	382.2	47.2	56.1	54.1	64.0		
Kerry Group	92.75	4.94	5.41	18.8	17.1	14.4	13.3	4%	4%	1.5%	1.7%	7035.3	7213.2	945.2	1017.3	1247.9	1321.9		
Kingfisher	291.50	20.41	19.65	12.9	14.8	5.5	5.9	10%	8%	4.7%	4.3%	12784.0	12889.1	628.0	608.3	1299.0	1276.0		
Kingspan	70.80	4.00	4.42	17.7	16.0	11.5	10.3	5%	5%	0.8%	0.9%	9375.0	9822.1	927.1	1013.4	1235.1	1333.4		
Lufthansa	7.32	1.07	1.26	6.8	5.8	7.1	6.5	18%	19%	4.1%	4.1%	39742.1	41642.7	1883.1	2153.1	3166.8	3489.1		
Marston's	41.95	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	286.00	28.53	29.75	10.0	9.6	6.7	6.3	7%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5		
Molten Ventures	320.00	48.11	47.64	6.7	6.7	6.1	6.3	11%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3		
Mondi	1227.50	1.04	1.36	13.7	10.5	7.8	6.5	3%	10%	4.6%	4.8%	7802.2	8299.0	744.0	928.7	1212.2	1418.3		
NCC Group	143.00	5.53	7.09	25.8	20.2	9.5	8.4	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9		
Origin Enterprises	3.76	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	2.05	0.12																	