

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			
AIB Group	6.58	0.77	0.75	8.5	8.8	1.0	0.9			6.0%	6.2%	4408.5	4398.6	2067.2	2021.6			
Air France-KLM	12.73	4.76	5.68	2.7	2.2	3.6	3.2	49%	77%	0.0%	0.0%	33182.7	34540.1	1875.2	2137.1			
Applied Nutrition	132.00	8.57	9.66	15.4	13.7	10.9	9.1	4%	5%	0.0%	0.0%	99.8	112.9	27.9	31.6			
B&M European Val	218.80	34.42	34.55	11.9	6.3	8.2	5.1	7%	14%	3.7%	6.9%	5571.0	5892.5	527.0	536.5			
Bank of Ireland	11.78	1.25	1.41	9.4	8.3	0.9	0.8			5.4%	5.9%	4034.1	4077.6	1682.3	1702.2			
Bakkavor Group	236.00																	
Barratt Redrow	374.90	30.44	34.82	12.3	10.8	0.6	0.7	7%	14%	4.3%	4.5%	5559.7	6075.9	601.6	720.8			
Bellway	2492.00	171.59	198.95	14.5	12.5	0.8	0.8	3%	6%	2.6%	3.2%	2759.5	3010.1	297.9	339.7			
Berkeley Group	3664.00	370.16	317.54	11.9	11.5	1.3	1.0	4%	6%	1.6%	3.3%	2486.5	2374.4	514.7	444.0			
Breedon Group	363.80	31.45	33.73	11.6	10.8	6.3	5.7	4%	9%	4.2%	4.4%	1762.0	1842.4	164.5	177.6			
Bytes Technology	358.80	25.75	27.00	13.9	13.3	10.0	8.5	8%	9%	8.7%	9.7%	222.1	248.3	72.7	81.7			
C & C Group	174.40	0.12	0.12	15.9	16.8	8.9	9.5	3%	4%	3.3%	3.2%	1665.5	1713.6	77.2	79.6			
Cairn Homes	2.20	0.20	0.23	10.8	9.7	7.1	6.9	4%	13%	4.1%	4.6%	961.1	1007.4	160.4	171.5			
Coca-Cola HBC	3922.00	2.55	2.76	17.7	16.3	10.7	9.9	4%	4%	2.6%	2.9%	11652.6	12299.1	1315.8	1418.3			
Compass Group	2641.00	1.30	1.43	27.1	24.6	15.7	14.6	3%	3%	1.9%	2.0%	45142.2	48542.0	3264.4	3539.6			
Cranswick	5300.00	273.41	292.01	17.3	18.1	9.2	9.1	3%	3%	2.1%	2.0%	2723.3	2942.6	190.8	229.2			
CRH	97.95	553.90	633.97	17.7	15.5	10.7	9.8	9%	10%	1.5%	1.6%	37512.9	39301.7	5607.1	6196.0			
Dalata Hotel Group	6.38																	
Datalex	0.27	-0.01	0.00	nm	348.9	188.2	20.5	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1			
DCC	4662.00	401.60	439.84	13.4	10.6	8.1	6.6	8%	12%	3.8%	4.6%	18011.1	17462.1	439.6	530.6			
Devolver Digital	23.50	1.30	1.72	24.0	18.2	5.2	4.3	9%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7			
Diageo	1904.00	1.63	1.69	15.6	15.0	12.5	12.0	5%	6%	4.1%	4.1%	20177.6	20867.1	5920.6	6165.1			
Dole	14.10	129.83	141.67	10.9	10.0	5.0	4.5	7%	12%	2.4%	2.5%	8685.2	8802.1	283.7	296.5			
easyJet	493.10	69.60	78.55	7.1	6.3	2.3	2.0	17%	10%	2.9%	3.1%	10165.0	10841.7	671.9	829.1			
Entain	1014.00	45.45	66.86	22.3	15.2	9.6	8.9	4%	5%	1.9%	2.0%	5280.4	5459.4	708.9	856.0			
Evoke	70.10	11.35	17.65	6.2	4.0	5.6	4.8	24%	34%	0.0%	0.0%	1842.3	1929.0	233.9	267.3			
FBD Holdings	13.55	1.66	FALSE	8.2	FALSE	1.2	FALSE			9.2%	FALSE	422.9	FALSE	56.6	FALSE			
Fever-Tree Drinks	947.00	24.15	29.72	39.2	31.9	22.1	19.3	3%	3%	1.9%	2.0%	374.5	412.0	30.9	37.0			
Flutter Entertainment	300.08	9.08	13.07	33.1	23.0	18.0	13.9	3%	4%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7			
Forterra	197.20	13.07	14.50	15.1	13.6	8.3	6.6	6%	11%	2.9%	3.4%	380.9	413.7	41.4	49.9			
Frontier Developm	377.50	587.49	849.11	0.6	0.4	3.8	3.2	3%	3%	0.0%	0.0%	90.6	96.6	5.7	9.1			
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			
Games Workshop	16040.00	525.16	561.13	30.5	28.6	19.1	17.8	3%	4%	2.9%	3.1%	586.6	630.0	229.1	244.3			
Glanbia	14.69	1.27	1.42	11.6	10.3	8.9	7.9	8%	9%	3.1%	3.4%	3836.5	3938.2	343.8	381.9			
Glenveagh Propert	1.90	0.20	0.21	9.7	9.0	11.2	9.8	7%	15%	0.0%	0.0%	1005.2	1072.3	141.8	146.5			
Grafton Group	882.70	69.97	77.75	12.6	11.4	6.1	5.6	4%	7%	4.3%	4.5%	2528.5	2633.1	159.3	176.4			
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			
Greencore	257.00																	
Greggs	1595.00	129.34	132.76	12.3	12.0	5.9	5.5	nm	4%	4.1%	4.2%	2171.5	2354.7	190.6	199.2			
Hammerson	299.20																	
Heidelberg Matera	193.40	10.42	FALSE	18.6	FALSE	10.1	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE			
Hostelworld Group	116.50	0.11	0.15	11.9	9.2	7.6	5.5	9%	12%	0.0%	0.0%	96.7	107.8	8.3	12.1			
Howden Joinery	857.50	46.31	51.01	18.5	16.8	10.1	9.6	5%	5%	2.8%	3.2%	2346.0	2433.2	341.3	367.9			
JAG	381.30	0.58	0.70	7.6	6.3	3.2	2.7	12%	17%	2.7%	3.4%	33314.2	34530.2	4443.1	4908.7			
Ibstock	147.40	8.23	11.39	17.9	12.9	9.5	7.3	3%	9%	2.8%	3.9%	393.5	440.9	45.6	62.7			
ICG	5.54	0.40	0.44	13.9	12.6	7.3	6.7	12%	4%	2.9%	3.1%	633.6	664.4	74.1	79.3			
IRES REIT	0.98	0.06	0.13	16.3	7.4	0.8	0.0	2%	3%	4.8%	5.1%	65.7	67.6	54.7	92.0			
J.D. Wetherspoon	728.00	50.97	58.99	14.3	12.3	8.4	8.0	2%	4%	1.6%	1.6%	2117.8	2229.4	141.4	153.0			
Jet2	1624.00	190.17	184.08	8.5	8.8	2.0	1.5	20%	13%	0.9%	1.1%	7173.5	7773.7	446.5	494.6			
Kainos Group	709.00	30.50	36.18	23.2	19.6	13.7	11.5	6%	7%	3.4%	3.5%	365.1	382.2	47.2	56.1			
Kerry Group	80.90	4.94	5.41	16.4	14.9	12.8	11.7	5%	5%	1.7%	1.9%	7035.3	7213.2	945.2	1017.3			
Kingfisher	267.40	20.41	19.65	12.9	13.6	5.5	5.5	10%	9%	4.7%	4.6%	12784.0	12889.1	628.0	608.3			
Kingspan	69.80	4.00	4.42	17.4	15.8	11.7	10.5	5%	5%	0.8%	0.9%	9378.8	9865.8	927.0	1014.4			
Lufthansa	7.45	1.06	1.24	7.0	6.0	7.0	6.4	18%	19%	4.0%	4.0%	39806.8	41731.0	1883.0	2163.6			
Marston's	42.00	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			
Mitchells & Butlers	273.50	28.53	29.75	9.6	9.2	6.5	6.2	7%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7			
Molten Ventures	364.00	48.11	47.64	7.6	7.6	6.9	7.2	10%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2			
Mondi	1061.50	0.96	1.21	12.6	10.1	7.3	6.3	1%	9%	5.3%	5.6%	8059.9	8683.9	702.8	839.2			
NCC Group	146.80	5.53	7.09	26.5	20.7	9.8	8.6	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1			
Origin Enterprises	3.66	0.52	0.57	7.1	6.4	6.1	5.7	nm	9%	4.7%	4.9%	2189.6	2252.6	78.9	83.8			
Permanent TSB	2.12	0.10	0.21	20.4	10.0	0.5	0.5			0.9%	4.2%	653.7	689.7	138.4	168.2			
Persimmon	1162.00	94.75	110.68	12.3	10.5	1.0	1.0	3%	11%	3.4%	3.4%	3433.1	3730.0	446.6	515.8			
Playtech	427.50	0.12	0.20	41.5	24.5	0.8	0.8	1%	2%	0.0%	0.0%	797.8	831.6	65.4	89.4			
Rank Group	160.60	7.76	8.63	20.7	18.6	8.4	7.9	1%	1%	0.8%	0.9%	782.2	818.7	55.7	60.7			
Ryanair	26.16	1.45	2.02	12.5	13.0	6.7	7.5	10%	9%	2.2%	1.6%	13948.5	15233.2	1558.0	2303.4			
Smurfit Westrock	43.82	2.95	3.28	14.8	13.4	7.1	6.3	5%	8%	3.9%	4.2%	31378.3	32808.0	2453.2	2905.7			
SSP Group	169.10	11.63	13.50	14.5	12.5	7.1	6.4	nm	2%	2.4%	2.8%	3690.9	3890.4	274.2	297.5			
Tate & Lyle	536.50	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			
Taylor Wimpey	101.85	8.44	9.52	12.1	10.7	0.8	0.8	4%	8%	9.3%	9.8%	3736.4	3983.2	441.7	498.1			
Everplay Group	385.00	25.02	25.21	15.4	15.3	7.1	6.9	5%	5%	0.0%	0.0%	176.2	176.7	33.2	33.6			
Travis Perkins	565.00	49.14	60.01	11.5	9.4	5.7	5.1	7%	8%	4.1%	5.0%	4697.5	4874.0	161.4	196.2			
Trustpilot Group	243.60	0.03	0.05	93.2	62.5	51.0	33.4	2%	3%	0.0%	0.0%	241.6	276.5	15.6	29.8			
Uniphar	3.99	0.22	0.24</															