

Goodbody Market Commentary Metrics



08 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	6.97	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	10.09	4.80	5.60	2.1	1.8	3.4	3.1	62%	96%	0.0%	0.0%	33158.0	34514.6	1888.0	2114.7	4685.1	5008.0		
Applied Nutrition	125.80	8.57	9.66	14.7	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	270.60	34.42	34.55	11.9	7.8	8.2	6.0	7%	11%	3.7%	5.6%	5571.0	5892.5	527.0	536.5	619.0	629.9		
Bank of Ireland	12.43	1.24	1.46	10.0	8.5	0.9	0.9			5.2%	5.6%	4023.1	4117.0	1670.9	1740.2				
Bakkavor Group	219.00																		
Barratt Redrow	420.50	30.44	34.82	13.8	12.1	0.7	0.7	7%	13%	3.8%	4.0%	5559.7	6075.9	601.6	720.8	614.4	726.6		
Bellway	2630.00	171.59	198.95	15.3	13.2	0.9	0.8	3%	5%	2.5%	3.0%	2759.5	3010.1	297.9	339.7	303.9	339.8		
Berkeley Group	3588.00	285.85	292.86	12.6	12.3	1.1	1.1	9%	6%	7.3%	7.3%	2383.5	2452.6	467.1	478.8	443.8	455.8		
Breedon Group	377.20	33.99	41.15	11.1	9.2	5.8	4.8	7%	10%	4.0%	4.2%	1801.5	1939.2	174.1	206.9	294.4	335.4		
Bytes Technology	363.00	25.75	27.00	14.1	13.4	10.1	8.6	8%	9%	8.6%	9.6%	222.1	248.3	72.7	81.7	74.2	83.4		
C & C Group	164.80	0.12	0.12	15.9	16.0	8.9	9.2	3%	5%	3.3%	3.4%	1665.5	1713.6	77.2	79.6	112.0	115.2		
Cairn Homes	2.10	0.20	0.23	10.3	9.3	6.7	6.6	4%	14%	4.3%	4.8%	961.1	1007.4	160.4	171.5	164.8	176.4		
Coca-Cola HBC	4006.00	2.55	2.76	18.2	16.9	11.0	10.2	3%	4%	2.5%	2.8%	11652.6	12299.1	1315.8	1418.3	1733.7	1847.1		
Compass Group	2512.00	1.30	1.43	26.4	24.0	15.4	14.3	3%	3%	1.9%	2.1%	45142.2	48542.0	3264.4	3539.6	4325.4	4639.3		
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	94.34	553.35	632.99	17.0	14.9	10.3	9.6	9%	10%	1.6%	1.6%	37509.9	39298.5	5602.3	6187.6	7440.5	8053.0		
Dalata Hotel Group	6.46																		
Datalex	0.35	-0.01	0.00	nm	459.0	250.3	27.3	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7		
DCC	4768.00	401.60	439.84	13.4	10.8	8.1	6.7	8%	12%	3.8%	4.5%	18011.1	17462.1	439.6	530.6	784.0	797.0		
Devolver Digital	23.00	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	1900.50	1.63	1.69	15.9	15.3	12.8	12.2	4%	5%	4.0%	4.0%	20177.6	20867.1	5920.6	6165.1	6399.1	6633.2		
Dole	14.13	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	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	910.20	45.45	66.86	20.0	13.6	9.0	8.3	5%	6%	2.2%	2.3%	5280.4	5459.4	708.9	856.0	1106.1	1186.4		
Evoke	65.90	11.35	17.65	5.8	3.7	5.5	4.7	26%	36%	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	926.00	24.15	29.72	38.3	31.2	21.5	18.8	3%	4%	1.9%	2.0%	374.5	412.0	30.9	37.0	44.9	52.0		
FD Technologies	2445.00																		
Flutter Entertainment	283.50	9.08	13.07	31.2	21.7	17.2	13.2	3%	5%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	9400.1	4373.5		
Forterra	191.20	10.88	14.00	17.6	13.7	8.1	6.5	8%	11%	2.5%	3.6%	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	578.00	34.22	40.26	19.2	14.4	8.6	7.7	nm	5%	3.0%	3.8%	376.3	394.6	47.2	42.4	67.6	70.1		
Games Workshop	16020.00	542.36	571.01	29.5	28.1	18.5	17.4	3%	4%	2.9%	3.1%	601.2	641.3	236.7	248.7	277.8	294.1		
Glanbia	14.91	1.27	1.42	11.8	10.5	9.0	8.0	7%	9%	3.0%	3.3%	3836.5	3938.2	343.8	381.9	491.1	530.6		
Glenveagh Proper	1.76	0.20	0.21	9.0	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	982.50	69.84	77.34	14.1	12.7	6.7	6.1	4%	6%	3.9%	4.1%	2510.4	2601.8	159.3	176.0	309.3	330.0		
Greencoat Renewa	0.77	0.14	0.14	5.3	5.4	13.9	15.2	18%	18%	9.2%	9.7%	216.6	215.4	189.2	187.9	189.2	187.9		
Greencore	234.00																		
Greggs	1703.00	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	293.60																		
Heidelberg Mater	199.70	10.42	FALSE	19.2	FALSE	10.4	FALSE	5%	FALSE	1.3%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	141.50	0.11	0.15	14.7	11.3	9.5	7.1	8%	10%	0.0%	0.0%	96.7	107.8	8.3	12.1	19.6	24.0		
Howden Joinery	819.50	46.31	51.01	17.7	16.1	9.7	9.2	5%	5%	2.9%	3.4%	2346.0	2433.2	341.3	367.9	499.6	529.3		
IAG	354.80	0.56	0.68	7.4	6.1	3.2	2.7	12%	17%	2.9%	3.6%	33203.3	34415.3	4332.3	4793.8	6951.7	7647.8		
Ibstock	144.60	8.23	11.39	17.6	12.7	9.4	7.1	3%	9%	2.8%	4.0%	393.5	440.9	45.6	62.7	81.0	101.9		
ICG	5.70	0.38	0.41	15.0	13.8	7.4	6.7	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	65.7	0.0	4%	FALSE	5.5%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE		
J.D. Wetherspoon	783.00	50.97	58.99	15.4	13.3	8.6	8.2	2%	3%	1.5%	1.5%	2117.8	2229.4	141.4	153.0	249.6	261.7		
Jet2	1795.00	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	729.00	30.50	36.18	23.9	20.2	14.2	11.8	6%	7%	3.3%	3.4%	365.1	382.2	47.2	56.1	54.1	64.0		
Kerry Group	91.90	4.94	5.41	18.6	17.0	14.3	13.2	4%	4%	1.5%	1.7%	7035.3	7213.2	945.2	1017.3	1247.9	1321.9		
Kingfisher	284.20	20.41	19.65	12.9	14.5	5.5	5.8	10%	8%	4.7%	4.4%	12784.0	12889.1	628.0	608.3	1299.0	1276.0		
Kingspan	70.45	4.00	4.42	17.6	15.9	11.8	10.6	5%	5%	0.8%	0.9%	9378.8	9865.8	927.0	1014.4	1235.0	1334.4		
Lufthansa	7.27	1.07	1.26	6.8	5.8	7.1	6.5	18%	20%	4.1%	4.1%	39742.1	41642.7	1883.1	2153.1	3166.8	3489.1		
Marston's	42.05	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	284.00	28.53	29.75	10.0	9.5	6.6	6.3	7%	5%	0.0%	0.0%	2714.4	2831.1	325.0	329.7	457.6	466.5		
Molten Ventures	319.40	48.11	47.64	6.6	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	1179.00	1.04	1.36	13.1	10.1	7.6	6.3	3%	10%	4.7%	5.0%	7802.2	8299.0	744.0	928.7	1212.2	1418.3		
NCC Group	144.20	5.53	7.09	26.1	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	3.80	0.52	0.57	7.4	6.7	6.3	5.8	nm	9%	4.5%	4.7%	2189.6	2252.6	78.9	83.8	110.8	117.3		
Permanent TSB	2.08	0.12																	