

Goodbody Market Commentary Metrics



Company	Price		EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA		
	1c	2025	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	
ABB Group	5.49	6.69	0.76	8.0	7.9	0.8	0.8	60%	73%	14.0%	14.3%	4367.2	4302.4	2049.3	1939.2				
Air France-KLM	7.12	4.21	5.10	1.7	1.4	2.8	2.6	6%	6%	0.0%	0.0%	32674.5	33941.2	1812.6	2126.4	4695.9	5129.5		
BBM European Value Retail	322.00	36.88	38.77	8.7	8.3	6.6	6.4	9%	10%	5.2%	5.0%	5543.3	5943.5	556.9	587.7	639.8	675.4		
Bank of Ireland	9.08	1.29	1.41	7.1	6.4	0.7	0.6	0.0%	0.0%	7.4%	7.5%	4073.9	4143.6	1694.2	1694.6				
Balkancar Group	143.00	12.38	13.61	11.5	10.5	5.9	5.6	7%	8%	5.7%	5.0%	2255.6	2333.3	118.9	126.6	192.4	200.0		
Barratt Redrow	420.00	28.40	36.45	14.8	11.5	0.7	0.7	6%	6%	3.8%	4.3%	5474.8	6087.1	546.9	746.6	559.7	754.4		
Bellway	2372.00	160.68	195.10	14.8	13.2	0.8	0.7	6%	6%	3.0%	3.2%	2700.1	2939.0	287.6	343.7	293.7	343.8		
Bredon Group	3594.00	385.85	392.86	19.6	19.3	1.1	1.1	9%	9%	7.3%	7.3%	2383.5	2452.6	467.1	478.8	443.8	453.8		
Bresford Group	419.50	35.17	40.47	11.9	10.4	6.0	5.3	8%	9%	3.5%	3.5%	1708.4	1800.2	180.1	198.9	286.2	312.4		
Bryson Technology	421.80	19.85	22.35	21.3	19.0	13.2	11.3	6%	7%	5.6%	6.3%	228.1	251.2	63.8	71.5	65.2	74.1		
C.B.C Group	145.80	0.12	0.14	14.4	12.1	8.3	7.7	5%	5%	3.5%	4.1%	1678.0	1719.5	80.3	90.1	114.3	124.1		
Cain Homes	2.07	0.20	0.22	10.3	9.5	8.1	7.9	9%	11%	4.1%	4.8%	940.8	983.3	156.0	161.7	158.8	165.0		
Cores Power	168.00	-8.62	FALSE	mm	FALSE	mm	FALSE	mm	FALSE	0.0%	FALSE	68.8	FALSE	-25.4	FALSE	-11.5	FALSE		
Coca-Cola HBC	2710.00	2.49	2.74	19.0	11.8	7.8	7.2	3%	3%	3.5%	3.8%	11379.7	12059.0	1404.9	1306.0	1755.4	1883.3		
Compass Group	2673.00	1.28	1.40	25.6	23.4	14.9	14.0	3%	3%	2.0%	2.1%	44397.5	47023.3	3228.9	3468.3	4272.5	4533.5		
Convatec Group	239.00	0.17	0.19	17.1	15.3	9.9	8.8	3%	3%	2.3%	2.4%	2361.4	2495.0	517.1	573.9	652.9	709.2		
Convatec	4780.00	265.78	281.21	18.0	17.0	8.7	8.2	3%	4%	1.8%	1.9%	2758.4	2886.0	197.9	206.8	283.3	293.3		
CH2	95.75	606.43	681.92	15.8	14.0	10.1	9.4	10%	11%	1.5%	1.6%	37684.8	39606.8	3860.8	5854.4	6347.0	7611.4	8202.9	292.0
Delta Hotel Group	4.74	0.28	0.40	12.4	11.9	8.1	7.8	7%	8%	3.0%	3.0%	684.2	691.3	175.5	181.5	252.6	258.0		
Datatec	0.74	-0.01	0.00	mm	mm	216.1	23.5	mm	mm	0.0%	0.0%	30.2	31.2	-3.2	6.1	0.3	2.7		
DCC	5200.00	481.01	500.33	10.8	9.4	5.4	4.9	10%	10%	4.0%	4.2%	20536.6	20873.3	601.7	646.1	963.0	1005.0		
Devolper Digital	24.00	2.44	2.41	12.1	8.6	3.1	2.4	12%	16%	0.0%	0.0%	109.6	118.8	15.0	21.2	19.6	25.8		
Diageo	2360.50	1.67	1.74	17.2	16.6	13.6	13.2	3%	3%	3.6%	3.8%	20087.8	20642.9	6041.2	6234.1	6363.4	6523.7		
Dole	12.85	140.77	150.95	8.1	8.7	4.2	4.2	12%	12%	2.8%	2.8%	8400.0	8554.3	279.5	287.6	292.8	401.5		
DS Smith	576.50	34.45	36.44	16.7	15.8	10.0	9.8	3%	3%	3.3%	3.5%	7445.9	7805.2	604.5	634.6	1072.5	1072.5		
easyJet	506.20	25.87	81.77	6.7	6.2	2.2	2.2	4%	2%	2.8%	3.1%	10135.5	10684.1	759.8	829.8	1561.9	1693.0		
Easton	623.20	53.01	76.20	11.8	8.2	7.1	6.7	8%	9%	2.6%	3.2%	5325.7	5523.9	770.2	922.4	1131.2	1194.9		
Eusek	62.70	17.12	24.56	3.7	2.6	5.0	4.1	42%	55%	0.0%	0.0%	1883.0	1981.9	255.5	289.6	380.7	419.5		
FBD Holdings	12.60	1.66	FALSE	7.6	FALSE	1.1	FALSE	mm	mm	9.9%	FALSE	422.9	FALSE	56.6	FALSE				
Ferguson	14480.00																		
Fever-Tree Drinks	637.50	34.07	40.45	18.7	15.8	9.9	8.2	6%	6%	2.9%	3.2%	391.7	417.0	50.4	59.7	63.8	74.0		
FD Technologies	1934.00																		
Flutter Entertainment	262.45	9.10	11.77	28.8	22.3	15.6	12.2	3%	5%	0.0%	0.0%	19944.4	17676.6	2659.2	3229.8	3219.2	3939.8		
Forterra	161.40	12.86	17.33	12.5	9.3	6.8	5.5	9%	9%	4.1%	5.6%	363.7	392.5	41.0	47.7	62.3	74.7		
Frontier Developments	233.00	587.49	849.11	0.4	0.3	3.7	3.5	mm	2%	0.0%	0.0%	90.7	96.9	-8.2	-5.9	27.2	27.2		
Games Workshop Group	12800.00	525.16	561.13	24.4	22.8	15.2	14.1	4%	4%	3.6%	3.8%	586.6	630.0	229.1	244.3	270.3	289.8		
Glanbia	14.38	1.42	1.58	10.1	9.1	7.7	6.7	9%	10%	3.2%	3.5%	4218.5	4390.3	393.5	435.9	542.4	588.6		
Glenwest Properties	1.50	0.19	0.21	7.8	7.1	8.5	7.3	16%	14%	0.0%	0.0%	1017.5	149.3	141.9	146.1	153.6			
Grafton Group	905.70	72.28	79.27	12.5	11.4	7.8	7.0	5%	6%	4.4%	4.7%	2478.7	2572.8	164.9	185.5	301.9	327.5		
Greencore Renewables	0.79	0.14	0.14	5.5	5.5	14.0	15.3	18%	18%	8.9%	9.4%	216.6	189.2	189.2	189.2	189.2	189.2		
Greencore	176.80	14.54	16.80	12.2	10.5	5.7	5.1	7%	9%	1.5%	1.7%	1880.7	1947.0	102.3	111.3	165.5	174.6		
Greggs	2182.00	143.54	156.49	15.2	13.9	6.8	6.1	2%	6%	3.3%	3.6%	2204.2	2417.3	207.4	226.6	368.7	406.9		
Hammerston	282.80																		
Heidelberg Materials	127.55	10.42	FALSE	12.2	FALSE	7.0	FALSE	7%	FALSE	2.0%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	135.50	0.17	0.20	9.4	7.9	6.9	5.3	11%	12%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1		
Howden Joinery	774.50	47.32	50.44	16.4	15.4	9.3	9.0	6%	5%	3.1%	3.6%	2403.7	2517.3	352.7	369.7	506.8	527.6		
IAG	317.00	0.60	0.72	6.3	5.2	2.8	2.4	9%	13%	2.7%	3.2%	32931.5	34248.6	4369.0	4502.7	6767.8	6982.1		
Ibstock	170.40	11.00	13.41	15.5	12.7	8.6	7.4	7%	6%	4.2%	4.1%	424.5	456.0	64.9	77.6	95.7	109.6		
ICG	5.20	0.38	0.41	13.7	12.6	6.8	6.1	13%	6%	1.3%	3.3%	641.4	661.0	74.0	79.5	143.0	148.5		
IBES BETT	0.89	0.14	FALSE	6.5	FALSE	58.0	0.0	5%	FALSE	6.3%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE		
ITM Power	37.46	-5.68	-5.22	mm	mm	mm	mm	mm	mm	0.0%	0.0%	27.0	53.6	-43.9	-40.0	-36.1	-30.2		
J.D. Wetherspoon	607.50	53.40	59.97	11.4	10.1	7.2	6.9	11%	11%	2.0%	2.0%	2107.2	2212.2	152.8	163.0	255.0	265.6		
Jet2	1432.00	168.15	182.42	8.5	7.9	1.3	0.9	19%	14%	1.2%	1.3%	7219.2	7960.0	438.8	457.7	718.2	788.1		
Johnson Matthey	1341.00	170.95	183.63	7.8	7.3	5.4	5.0	5%	13%	6.0%	6.3%	4033.1	3967.6	467.6	501.7	611.7	656.1		
Kainos Group	772.00	30.50	36.18	25.3	21.3	15.1	12.7	5%	7%	3.2%	3.2%	365.1	382.2	47.2	56.1	54.1	64.0		
Kerry Group	91.20	5.17	5.70	17.6	16.0	12.8	11.5	4%	5%	1.5%	1.7%	8189.1	8477.8	1027.5	1125.6	1344.3	1445.9		
Knauf	238.40	20.31	21.55	11.7	11.1	5.6	5.2	10%	9%	5.2%	5.2%	12801.3	13298.6	622.2	661.3	1313.9	1389.5		
Kroger	67.00	3.99	4.51	16.8	14.9	9.7	9.2	4%	5%	0.9%	0.9%	9370.5	9996.3	926.6	1034.9	1226.6	1352.9		
LungLife AI	0.09	-0.14	FALSE	mm	FALSE	mm	FALSE	mm	mm	0.0%	FALSE	8.6	FALSE	-3.5	FALSE	-3.2	FALSE		
Lufthansa	5.72	1.32	1.50	4.3	3.8	2.6	2.3	26%	33%	5.2%	5.2%	39356.7	40995.4	2328.1	2584.6	4702.1	5068.3		
Manston's	42.20	8.02	9.40	5.3	4.5	7.6	6.9	16%	17%	0.0%	0.0%	919.8	953.4	159.2	168.8	202.9	213.3		
Mitchells & Butlers	243.00	27.75	29.49	8.8	8.2	6.2	5.8	8%	7%	0.0%	0.0%	2753.6	2865.2	319.9	329.5	461.2	475.0		
Molten Ventures	290.00	48.11	47.64	6.0	6.1	5.5	5.7	12%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3		
Mondi	1182.50	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE
NCC Group	140.00	5.53	7.05	25.3	19.8	9.4	8.2	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9		
Orqin Enterprises	2.76	0.52	0.58	5.3	4.7	5.1	4.8	mm	13%	6.2%	6.5%	2222.9	2289.2	78.9	85.1	112.6	119.5		
Permanent TSB	1.40	0.13	0.23	10.4	6.2	0.3	0.3	mm	2%	2.5%	12.4%	656.2	704.8	135.7	183.4				
Persimmon	1163.00	93.29	110.44	12.5	10.5	1.0	1.0	4%	8%	3.4%	3.4%	3338.8	3628.4	437.0	512.5	459.5	537.1		
Playtech	722.00																		
Rank Group	79.20	7.76	8.63	10.2	9.2	4.8	4.5	1%	2%	1.6%	1.8%	782.2	818.7	55.7	60.7	105.7	112.1		
Renalytix	11.75	-0.34	-0.22	mm	mm	mm	mm	mm	210%	0.0%	0.0%	28.1	61.8	-30.9	-19.8	-29.1	-17.9		
Ryanair	18.45	1.4																	