

Goodbody Market Commentary Metrics



20 January 2025																		
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA		
		2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	
ABB Group	5.47	0.69	0.76	8.0	7.8	0.8	0.8					4367.2	4302.4	2049.3	1939.2			
Air France-KLM	7.23	4.21	5.10	1.7	1.4	2.8	2.6	50%	71%	0.0%	0.0%	32674.5	33941.2	1812.6	2126.4	4695.9	5129.5	
B&M European Value Retail	313.50	36.88	38.77	8.5	8.1	6.5	6.3	9%	10%	5.3%	5.0%	5543.3	5943.5	556.9	587.7	639.8	675.4	
Bank of Ireland	9.10	1.29	1.41	7.1	6.4	0.7	0.6			7.4%	7.4%	4073.9	4143.6	1694.2	1694.2			
Balkancar Group	143.00	12.36	13.86	11.6	10.3	5.9	5.5	7%	8%	5.7%	5.7%	2326.0	2405.9	118.8	128.6	192.2	202.0	
Barratt Redrow	426.80	28.40	36.45	15.0	11.7	0.7	0.7	6%	8%	3.7%	4.2%	5474.8	6087.1	546.9	746.6	559.7	754.4	
Bellway	2422.00	160.88	195.10	15.1	12.4	0.8	0.8	6%	8%	2.5%	2.4%	2700.1	2939.0	243.9	243.7	343.8	343.8	
Berkley Group	3712.00	285.85	292.86	13.0	12.7	1.1	1.1	8%	6%	7.4%	7.4%	2383.5	2452.6	467.1	478.8	443.8	453.8	
Bresford Group	422.00	35.17	40.47	12.0	10.4	6.1	5.3	8%	9%	3.5%	3.7%	1708.4	1800.2	180.1	198.9	286.2	312.4	
Bytes Technology	432.00	19.85	22.35	21.8	19.4	13.5	11.6	9%	7%	5.5%	6.2%	228.1	251.2	83.8	74.5	65.2	74.1	
C.B.C Group	148.00	0.12	0.14	14.6	12.2	8.3	7.8	9%	8%	3.5%	4.1%	1678.0	1719.5	80.3	90.1	116.3	124.1	
Carn Homes	2.08	0.20	0.22	10.4	9.5	8.1	8.0	9%	11%	4.1%	4.8%	940.8	983.3	156.0	161.7	158.8	165.0	
Cores Power	166.40	-8.62	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE	
Coca-Cola HBC	2800.00	2.49	2.74	13.3	12.1	8.0	7.4	9%	6%	3.4%	3.7%	11379.7	12059.0	1404.9	1375.4	1883.3	1883.3	
Compass Group	2675.00	1.28	1.40	23.5	23.3	14.8	13.9	9%	7%	2.0%	2.1%	44397.5	47023.1	3228.9	3468.3	4272.5	4533.5	
Convatec Group	241.80	0.17	0.19	17.2	15.4	9.9	8.9	9%	6%	2.2%	2.2%	2361.4	2495.0	517.1	573.9	652.9	709.2	
CorvusTek	4905.00	286.23	281.61	18.4	17.4	8.9	8.4	9%	9%	1.8%	1.9%	2721.5	2845.9	197.8	206.6	287.2	293.1	
CSH	97.75	606.43	681.52	16.1	14.3	10.3	9.6	9%	11%	1.8%	1.8%	37684.8	39608.8	585.4	6347.0	7611.4	8202.9	
Dalata Hotel Group	4.76	0.28	0.40	12.4	11.0	8.1	7.8	7%	8%	2.8%	3.0%	684.2	695.1	176.5	181.5	252.6	258.0	
Datix	0.26	-0.01	0.00	nm	414.3	225.1	24.5	nm	nm	0.0%	0.0%	30.2	31.2	-3.2	0.1	0.3	2.7	
DCC	5430.00	481.01	500.33	11.3	10.9	6.2	5.6	9%	10%	3.8%	4.0%	20526.6	20873.2	601.7	646.1	963.0	1005.9	
Devolver Digital	24.00	2.44	2.41	12.0	8.9	3.0	2.0	12%	16%	0.0%	0.0%	109.6	118.8	15.0	21.2	19.6	25.8	
Diageo	2434.50	1.67	1.74	17.8	17.1	13.9	13.5	4%	4%	3.5%	3.7%	20087.8	20642.9	6041.2	6234.1	6363.4	6525.7	
Dole	13.22	140.77	150.95	11.2	8.6	4.7	4.4	11%	12%	2.2%	2.0%	8400.0	8554.3	279.5	287.6	392.8	401.5	
DS Smith	589.50	34.45	36.64	17.1	16.2	10.2	9.9	3%	3%	3.2%	3.4%	7445.9	7805.2	604.5	634.6	1072.5	1072.5	
easyJet	504.00	25.87	31.73	6.6	6.2	2.2	2.2	4%	9%	2.8%	3.1%	10135.5	10684.1	759.8	829.8	1561.9	1693.0	
Easton	669.60	53.01	26.20	12.6	8.8	7.4	6.9	7%	8%	2.4%	2.4%	5325.7	5523.9	770.2	932.4	1131.2	1194.9	
Eusek	72.50	17.22	24.56	4.2	3.0	5.1	4.7	36%	48%	0.0%	0.0%	1883.0	1981.9	255.5	289.6	380.7	419.5	
FBD Holdings	12.85	1.66	FALSE	7.7	FALSE	1.1	FALSE			9.7%	FALSE	422.9	FALSE	56.6	FALSE			
Farquhar	14710.00																	
Fever-Tree Drinks	850.50	34.07	40.45	19.1	16.1	10.1	8.4	6%	6%	2.8%	3.1%	391.7	417.0	50.4	59.7	63.8	74.0	
FD Technologies	1926.00																	
Flutter Entertainment	260.59	9.10	11.77	28.6	22.1	15.5	12.1	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	32.6	62.3	74.7	
Frontier Developments	220.50	587.49	849.11	0.4	0.3	3.5	3.4	nm	2%	0.0%	0.0%	90.7	96.9	-8.2	-5.9	27.2	27.2	
Games Workshop Group	13370.00	525.16	561.13	25.5	23.8	15.9	14.7	4%	4%	3.5%	3.7%	58.6	630.0	229.1	244.3	270.3	289.8	
Glanbia	14.56	1.42	1.58	10.2	9.2	7.8	6.8	9%	10%	3.2%	3.5%	4218.5	4390.3	393.5	435.9	542.4	588.6	
Glenwest Properties	1.51	0.19	0.21	7.9	7.1	8.5	7.3	16%	14%	0.0%	0.0%	1017.5	1049.3	146.1	146.1	153.6	153.6	
Grafton Group	903.70	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	
Greencast Renewables	0.29	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			
Greencore	184.20	14.54	16.80	12.7	11.0	5.9	5.3	7%	9%	1.4%	1.6%	1880.7	1947.0	102.3	111.3	165.5	174.6	
Greggs	2234.00	143.54	156.49	15.6	14.3	7.0	6.2	2%	6%	3.2%	3.5%	2204.2	2417.3	207.4	226.6	368.7	406.9	
Hammerston	283.60																	
Haidelberg Materials	129.55	10.42	FALSE	12.4	FALSE	7.1	FALSE	7%	FALSE	1.9%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE	
Hostelworld Group	134.50	0.17	0.20	9.3	7.8	6.8	5.2	11%	12%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1	
Howden Joinery	787.50	47.32	50.44	16.6	15.6	9.4	9.1	6%	5%	3.0%	3.5%	2403.7	2517.3	352.7	369.7	506.8	527.6	
IAG	317.50	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	168.80	11.00	13.41	15.3	12.6	8.6	7.4	7%	6%	3.3%	4.1%	424.5	456.0	64.9	77.6	95.7	109.6	
ICG	5.26	0.38	0.41	13.8	12.8	6.9	6.2	12%	6%	3.1%	3.3%	641.4	661.0	74.0	79.5	143.0	148.5	
IBES BFT	0.91	0.14	FALSE	6.7	FALSE	59.2	0.0	5%	FALSE	6.1%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE	
ITM Power	36.42	-5.68	-5.22	nm	nm	nm	nm	nm	nm	0.0%	0.0%	27.0	53.6	-43.9	-40.0	-36.1	-30.2	
J.D. Wetherspoon	605.00	53.40	59.97	11.3	10.1	7.2	6.9	11%	11%	2.0%	2.0%	2107.2	2216.2	152.8	163.0	255.0	265.6	
Jet2	1452.00	168.15	182.42	8.6	8.0	1.4	0.9	19%	14%	1.2%	1.2%	7219.2	7960.0	438.8	457.7	718.2	788.1	
Johnson Matthey	1375.00	120.95	183.63	8.0	7.5	5.6	5.1	5%	13%	5.9%	6.2%	4033.1	3967.9	467.6	501.7	611.7	656.1	
Kainos Group	790.00	30.50	36.18	25.9	21.8	15.5	13.0	5%	6%	3.1%	3.1%	365.1	382.2	47.2	56.1	54.1	64.0	
Kerry Group	93.00	5.17	5.70	18.0	16.3	11.0	11.8	4%	5%	1.8%	1.7%	8189.1	8477.8	1027.5	1125.6	1344.3	1445.9	
Knaufceiling	242.90	20.31	21.55	12.0	11.3	5.7	5.2	10%	9%	5.1%	5.1%	12801.3	13298.6	622.2	661.3	1313.9	1389.5	
Kristspan	68.85	3.99	4.51	17.3	15.3	9.9	4.9	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	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	8.6	FALSE	-3.5	FALSE	-3.2	FALSE	
Lufthansa	5.80	1.32	1.50	4.4	3.9	2.6	2.3	25%	33%	5.2%	5.2%	39356.7	40995.4	2328.1	2584.6	4702.1	5068.3	
Manston's	42.25	8.02	9.40	5.3	4.5	7.6	6.9	16%	17%	0.0%	0.0%	919.8	953.4	159.9	169.8	202.9	213.3	
Mitchells & Butlers	242.00	27.75	29.49	8.7	8.2	6.2	5.8	8%	8%	0.0%	0.0%	2753.6	2865.2	319.2	329.5	461.2	475.0	
Molten Ventures	296.00	48.11	47.64	6.2	6.2	5.6	5.8	12%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3	
Mondi	1200.50	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	
NCC Group	137.00	5.53	7.09	24.8	19.3	9.2	8.0	5%	1%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9	
Orqin Enterprises	2.77	0.52	0.58	5.4	4.8	5.1	4.8	nm	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			2.5%	12.4%	656.2	704.					