

Goodbody Market Commentary Metrics



28 January 2025																			
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA			
	LC	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026	2025	2026		
ABB Group	5.73	0.69	0.70	8.3	8.2	0.9	0.8					4367.2	4302.4	2049.3	1930.2				
Air France-KLM	7.70	4.21	5.10	1.8	1.5	2.8	2.6	55%	67%	0.0%	0.0%	33674.5	33941.2	1812.6	2126.4	4695.9	5129.5		
Applied Nutrition	151.40	8.57	9.66	17.7	15.7	12.6	10.6	3%	5%	0.0%	0.0%	99.8	115.9	27.9	31.6	28.9	32.6		
B&M European Value Retail	318.00	36.88	38.77	8.6	8.2	6.5	6.4	9%	10%	5.2%	5.5%	5543.3	5943.5	556.9	587.7	639.8	675.4		
Bank of Ireland	9.82	1.29	1.41	7.6	7.0	0.7	0.7			6.6%	6.9%	4073.9	4143.6	1694.2	1697.7				
Balkovier Group	135.50	12.36	13.86	11.0	9.8	5.6	5.3	8%	8%	6.0%	6.3%	2329.0	2405.9	118.8	126.6	192.2	202.0		
Barratt Redrow	436.80	36.45	36.45	15.4	15.0	0.7	0.8	5%	7%	3.7%	4.1%	5474.8	6087.1	546.9	746.6	559.7	754.4		
Bellway	2552.00	160.88	192.00	15.9	13.1	0.8	0.8	6%	5%	2.4%	2.7%	2700.1	2937.0	287.6	343.7	293.7	343.8		
Beredon Group	3810.00	385.85	392.86	13.3	13.0	1.2	1.2	8%	6%	6.9%	6.9%	2383.5	2452.6	467.1	478.8	443.8	455.8		
Bredon Group	427.00	35.17	40.47	12.1	10.6	6.1	5.4	8%	9%	5.4%	3.7%	1286.4	1802.6	180.1	198.9	286.2	312.4		
Brydes Technology	440.60	19.85	22.25	23.2	19.8	13.8	11.9	2%	7%	3.7%	6.1%	226.1	251.2	63.8	71.5	66.2	74.1		
C.B.C Group	144.20	0.12	0.14	14.3	11.9	8.2	7.7	3%	5%	3.6%	4.2%	1678.0	1719.5	80.3	90.1	116.3	124.1		
Cain Homes	2.14	0.20	0.22	10.7	9.8	8.4	8.2	8%	10%	4.0%	4.7%	940.8	983.3	156.0	161.7	158.8	165.0		
Carac Power	143.60	-8.62	-7.54	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm		
Coca-Cola HBC	2794.00	2.49	2.75	15.4	12.1	8.0	7.4	3%	5%	3.4%	3.7%	11378.7	12059.0	1304.0	1404.9	1755.4	1883.3		
Compass Group	2712.00	1.28	1.40	26.4	24.2	15.3	14.4	2%	2%	1.9%	2.1%	44397.5	47023.2	3226.0	3468.3	4275.5	4533.5		
Convatec Group	248.40	0.17	0.19	18.1	16.4	10.4	9.3	2%	6%	2.1%	2.2%	2361.4	2495.0	517.1	573.9	652.9	705.2		
Covestro	4995.00	266.23	281.61	18.8	17.7	9.1	8.6	3%	4%	1.8%	1.8%	2721.5	2848.9	195.8	206.6	287.2	295.1		
CBH	99.03	606.43	681.52	16.3	14.5	10.4	9.7	9%	10%	3.0%	3.2%	37684.8	39606.8	5856.4	6347.0	7611.4	8202.9		
Dalata Hotel Group	4.73	0.40	0.40	12.3	11.8	8.1	7.7	7%	9%	3.0%	3.2%	684.2	696.1	176.5	181.5	252.6	258.0		
Datatec	0.24	-0.01	0.00	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm	mm		
DCC	5440.00	481.01	500.37	11.3	10.9	6.2	5.6	4%	4%	4.0%	4.0%	20526.6	20873.2	601.7	646.1	963.0	1005.0		
Devolver Digital	24.00	1.20	1.72	23.0	17.4	5.0	4.1	3%	19%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4		
Diageo	2492.50	1.67	1.74	18.6	17.4	14.2	14.0	4%	4%	3.3%	3.5%	20087.8	20642.9	6041.2	6234.1	6363.4	6525.7		
Dole	13.81	140.77	150.95	9.8	9.1	4.9	4.5	11%	11%	2.6%	2.8%	8400.0	8554.3	279.5	287.6	392.8	401.5		
D.S. Smith	607.00	34.45	36.44	17.6	16.7	10.4	10.2	2%	4%	3.1%	3.2%	7445.9	7805.2	604.5	634.6	1072.5	1072.5		
easyJet	492.40	25.87	81.77	6.5	6.0	2.3	2.3	4%	10%	2.9%	3.1%	10135.5	10684.1	759.8	829.8	1561.9	1693.0		
Endam	684.20	53.01	76.20	12.9	9.0	5.0	7.0	7%	8%	2.3%	3.2%	5325.7	770.2	932.4	1131.2	1194.9			
Eusek	68.45	17.12	24.56	4.0	2.8	5.0	4.2	38%	50%	0.0%	0.0%	1883.0	1981.9	255.5	289.6	380.7	419.5		
FBD Holdings	12.80	1.66	FALSE	7.7	FALSE	1.1	FALSE	mm	mm	9.8%	FALSE	422.9	FALSE	56.6	FALSE				
Ferguson	14450.00																		
Fever-Tree Drinks	644.50	34.07	40.45	18.9	15.9	10.0	8.3	6%	5%	2.8%	3.1%	391.7	417.0	59.4	59.7	63.8	74.0		
FD Technologies	1878.00	-21.99	-6.51	mm	mm	mm	28.8	21.9	mm	mm	0.0%	0.0%	247.2	267.1	-3.2	1.2	19.2	25.6	
Filinvest Entertainment	262.09	9.10	11.77	28.8	22.3	15.5	12.2	3%	5%	0.0%	0.0%	15944.4	17678.6	2659.2	3329.8	3219.2	3939.8		
Fofortis	158.40	12.86	17.33	12.3	9.1	6.7	5.4	9%	9%	4.1%	5.7%	363.4	392.5	41.0	52.6	62.3	74.7		
Frontier Developments	238.00	587.49	849.11	0.4	0.3	2.4	3.3	5%	mm	0.0%	0.0%	90.1	96.7	5.2	-5.4	37.9	28.4		
Games Workshop Group	14420.00	525.16	561.13	27.5	25.7	17.1	15.9	4%	4%	3.2%	3.4%	586.6	630.0	239.1	244.3	270.3	289.8		
Glanbia	14.92	1.42	1.58	10.5	9.4	8.0	7.0	8%	10%	3.1%	3.4%	4218.5	4390.3	393.5	430.4	542.4	588.6		
Glanvilles Properties	1.62	0.19	0.21	8.5	7.7	8.1	7.9	15%	13%	0.0%	0.0%	1017.5	1053.0	141.9	149.3	146.1	153.6		
Grafton Group	903.80	72.28	79.27	12.5	11.4	7.7	7.0	5%	6%	4.4%	4.7%	2478.7	2572.8	164.9	185.5	301.9	327.5		
Greencoast Renewables	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	182.20	14.54	16.80	12.5	10.8	5.9	5.2	7%	9%	1.4%	1.7%	1880.7	111.3	102.3	111.3	165.5	174.6		
Greggs	2152.00	143.54	156.49	15.0	13.8	6.7	6.0	2%	6%	3.3%	3.6%	2204.2	2417.3	207.4	226.6	368.7	406.9		
Hammerson	277.20																		
Heidelberg Materials	134.90	10.42	FALSE	13.0	FALSE	7.4	FALSE	7%	FALSE	1.9%	FALSE	2347.2	FALSE	2852.1	FALSE	3782.0	FALSE		
Hostelworld Group	131.00	0.17	0.20	9.1	7.6	6.7	5.0	11%	12%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1		
Howden Joinery	792.50	47.32	50.44	16.7	15.7	9.5	9.2	6%	5%	3.0%	3.5%	2403.7	2517.3	357.2	369.7	506.8	527.6		
IAG	322.80	0.57	0.61	6.7	6.3	2.9	2.6	12%	15%	2.6%	3.1%	34283.5	34248.6	4293.2	4336.0	6767.8	6982.1		
Ibstock	165.00	11.00	13.41	15.0	12.3	8.4	7.2	7%	6%	3.3%	4.2%	424.5	456.0	64.9	77.6	95.7	109.6		
ICG	5.08	0.38	0.41	13.4	12.3	6.0	6.0	13%	6%	3.2%	3.4%	641.4	661.0	74.0	79.5	143.0	148.5		
IBES BFT	0.89	0.14	FALSE	6.5	FALSE	58.1	0.0	5%	FALSE	6.2%	FALSE	65.2	FALSE	87.3	FALSE	85.1	FALSE		
ITM Power	34.46	-5.68	-5.22	mm	mm	mm	mm	mm	mm	0.0%	0.0%	22.0	FALSE	-43.9	-40.0	-36.1	-30.2		
J.D. Wetherspoon	615.50	53.40	59.97	11.5	10.3	7.3	6.9	11%	11%	1.9%	1.9%	2107.7	2216.2	152.8	163.0	255.0	265.6		
Jet2	1506.00	186.16	193.23	8.1	7.8	1.2	1.0	21%	13%	743.0	0.3%	743.5	8188.7	535.1	532.5	814.9	865.1		
Johnson Matthey	1404.00	170.95	183.63	8.2	7.6	5.6	5.2	5%	13%	5.8%	6.0%	4033.1	3967.9	467.6	501.7	611.7	656.1		
Kainos Group	794.00	30.50	36.18	26.0	21.9	15.6	13.1	5%	6%	3.1%	3.1%	382.2	382.2	47.2	56.1	54.1	64.0		
Kerry Group	96.65	5.17	5.70	18.7	17.0	13.5	12.2	4%	5%	1.4%	1.6%	8189.1	8477.8	1027.5	1125.6	1344.3	1445.9		
Knaufceiling	238.40	20.31	21.55	11.7	11.1	5.6	5.2	10%	9%	5.2%	5.2%	12981.3	13298.6	622.2	661.3	1319.3	1389.5		
Kingspan	68.20	3.99	4.51	17.1	15.1	11.2	9.8	4%	5%	0.9%	0.9%	9370.5	9996.3	926.6	1034.9	1226.6	1352.9		
LungLife AI	0.13	-0.14	FALSE	mm	FALSE	mm	FALSE	mm	FALSE	0.0%	FALSE	8.6	FALSE	-3.5	FALSE	-3.2	FALSE		
Lufthansa	6.27	1.32	1.50	4.8	4.2	2.7	2.4	23%	29%	4.8%	4.8%	39356.7	40995.4	2328.1	2584.6	4702.1	5068.3		
Manston's	40.15	8.02	9.40	5.0	4.3	7.5	6.9	16%	18%	0.0%	0.0%	1919.8	169.8	202.9	213.3				
Mitchells & Butlers	230.00	27.75	29.49	8.3	7.8	6.0	5.6	8%	8%	0.0%	0.0%	2753.6	2865.2	319.9	329.5	461.2	475.0		
Molten Ventures	316.00	48.11	47.64	6.6	6.6	6.2	6.2	11%	0%	0.0%	0.0%	126.5	126.8	96.9	96.2	96.9	96.3		
Mondi	1223.50	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE		
NCC Group	141.60	5.53	7.05	25.6	20.0	9.5	8.3	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9		
Orion Enterprises	2.70	0.52	0.58	5.2	4.7	5.0	4.8	mm	14%	6.3%	6.7%	2222.9	2289.2	78.9	85.1	112.6	119.5		
Permanent TSB	1.36	0.13	0.23	10.1	6.0	0.3	0.3	2%	2%	2.6%	2.6%	656.2	656.2	135.7	183.4				
Persimmon	1242.00	93.29	110.44	13.3	11.2	1.1	1.1	4%	7%	3.2%	3.2%	3338.8	3628.4	437.0	512.5	459.5	537.1		
Playtech	720.00																		
Rank Group	85.20	7.76	8.63	11.0	9.9	5.0	4.7	1%	2%	1.5%	1.7%	782.2	818.7	55.7	60.7	105.7	112.1		
Renalytix	10.50	-0.34	-0.22	mm	mm	mm	mm	mm	231%	0.0%	0.0%	28.1	61.8	-30.9	-19.8	-29.1	-17.9		
Ryanair	20.37	1.45	1.97	14.0	10.3	7.5	5.5	7%	9%	2.0%	2.0%	13949.8	14713.9	1611.9	2212.5	2860.1	3529.7		
STG	15.18																		
Smith+Nephew	12.62	1.16	1.32	10.9	9.6	8.2	7.6	6%	7%	3.3%	3.7%	6110.0	6443.8	1219.8	1342.2	1646.1	1775.5		
Sourfit Westrock	52.67	3.88	4.23	13.6	12.5	7.9	7.3	5%	6%	3.3%	3.5%	11							