

Goodbody Market Commentary Metrics



28 March 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
AIB Group	6.08	0.69	0.69	8.9	8.7	0.9	0.9			5.3%	5.7%	4386.9	4331.4	2068.8	1958.1		
Air France-KLM	9.24	4.21	5.10	2.2	1.8	2.9	2.7	46%	56%	0.0%	0.0%	32674.5	33941.2	1812.6	2120.4	4695.9	5129.5
Applied Nutrition	120.00	8.57	9.66	14.0	12.4	8.8	8.2	4%	6%	0.0%	0.0%	99.8	112.9	27.9	31.6	28.9	32.6
BAM European Va	261.10	35.35	36.60	7.4	7.1	5.9	5.7	10%	12%	6.1%	6.3%	5508.6	5874.6	536.1	557.8	618.4	644.5
Bank of Ireland	11.27	1.37	1.46	8.2	7.7	0.8	0.8			6.1%	6.2%	4094.9	4182.6	1715.1	1730.6		
Bakkavor Group	182.00																
Barratt Redrow	424.60	30.44	34.82	13.9	12.2	0.7	0.7	7%	12%	3.8%	4.0%	5559.7	6075.9	601.6	720.8	614.4	726.6
Bellway	2382.00	160.68	191.29	14.8	12.5	0.8	0.8	4%	5%	2.7%	3.4%	2700.1	2972.6	287.6	335.4	293.7	335.5
Berkeley Group	3590.00	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
Bresdon Group	458.00	36.60	42.29	12.5	10.8	6.4	5.4	5%	11%	3.3%	3.5%	1862.4	1997.3	185.8	211.4	309.6	343.0
Bytes Technology	495.40	19.85	22.25	25.0	22.3	15.8	13.6	5%	6%	4.8%	5.4%	228.1	251.2	63.8	71.5	66.2	74.1
C & C Group	128.00	0.11	0.12	13.6	12.7	7.9	7.9	5%	6%	4.0%	4.3%	1666.3	1707.4	76.9	79.4	110.9	113.4
Cairn Homes	1.97	0.20	0.22	9.8	9.0	7.2	7.1	6%	13%	4.3%	5.1%	941.1	1003.3	158.2	164.3	161.0	167.6
Ceres Power	57.20	-8.62	FALSE	nm	FALSE	nm	FALSE	nm	FALSE	0.0%	FALSE	68.8	FALSE	-26.4	FALSE	-11.5	FALSE
Coca-Cola HBC	3464.00	2.49	2.74	16.7	15.2	9.8	9.0	4%	5%	2.7%	3.0%	11379.7	12059.0	1304.0	1404.9	1755.4	1883.3
Compass Group	2565.00	1.28	1.40	25.9	23.8	15.1	14.2	3%	3%	1.9%	2.1%	44397.5	47022.3	3228.9	3468.3	4272.5	4533.5
Cranwick	4860.00	266.23	281.61	18.3	17.3	8.9	8.3	5%	5%	1.8%	1.9%	2721.5	2849.8	195.8	206.6	282.2	293.1
CRH	92.14	571.88	639.76	16.1	14.4	9.8	9.1	10%	11%	1.6%	1.7%	37929.8	39857.8	5726.1	6204.3	7613.0	8205.2
Dalata Hotel Group	5.39	0.38	0.40	14.1	13.5	8.7	8.3	6%	7%	2.6%	2.8%	684.2	698.5	176.5	181.5	252.6	258.0
Datalex	0.40	-0.01	0.00	nm	482.6	263.6	28.7	nm	1%	0.0%	0.0%	30.2	33.2	-2.3	0.1	0.3	2.7
DCC	5215.00	477.33	500.52	10.9	10.4	6.0	5.5	9%	10%	4.0%	4.2%	20507.9	20842.5	597.1	640.3	958.4	1006.1
Devolver Digital	21.00	1.30	1.72	20.9	15.8	4.3	3.5	10%	10%	0.0%	0.0%	109.6	118.9	7.8	10.7	12.4	15.4
Diageo	2022.00	1.64	1.69	16.0	15.6	13.0	12.6	5%	5%	3.9%	3.9%	20079.9	20459.9	5925.2	6083.1	6358.9	6485.9
Dole	14.42	133.38	144.45	10.8	10.0	5.3	4.9	7%	9%	2.3%	2.5%	8465.5	8637.2	273.5	286.2	380.1	392.8
easyJet	473.20	75.89	81.77	6.2	5.8	1.9	1.8	20%	13%	3.0%	3.3%	10339.5	10922.0	800.9	861.5	1635.0	1762.6
Entrain	635.00	45.45	66.86	14.0	9.5	7.4	6.9	7%	8%	3.1%	3.3%	5280.4	5459.4	708.9	856.0	1106.1	1186.4
Evoke	50.95	11.35	17.65	4.5	2.9	5.4	4.6	33%	47%	0.0%	0.0%	1842.3	1929.0	233.9	267.3	359.1	397.2
FBD Holdings	13.95	1.66	FALSE	8.4	FALSE	1.2	FALSE	FALSE	FALSE	9.0%	FALSE	422.9	FALSE	56.6	FALSE		
Feruson	12560.00																
Fever-Tree Drinks	792.00	24.26	30.07	32.6	26.3	17.1	14.3	6%	4%	2.2%	2.3%	378.3	416.7	35.9	43.1	45.7	53.5
FD Technologies	1776.00	-57.35	42.11	nm	42.2	24.4	13.8	nm	nm	0.0%	0.0%	164.1	96.8	-4.3	11.0	17.9	29.6
Flutter Entertainm	237.91	9.08	13.07	26.2	18.2	14.8	11.4	4%	6%	0.0%	0.0%	17014.1	19467.9	2787.6	3672.7	3400.1	4373.5
Forterra	174.00	12.86	17.33	13.5	10.0	7.2	5.8	8%	8%	3.8%	5.2%	363.7	392.5	41.0	52.6	62.3	74.7
Frontier Developm	216.50	587.49	849.11	0.4	0.3	2.2	3.0	6%	nm	0.0%	0.0%	90.1	96.7	5.2	-5.4	37.9	28.4
Fuller, Smith & Tu	534.00	30.21	34.76	17.7	15.4	7.9	7.5	1%	4%	3.7%	3.9%	374.6	396.6	49.3	41.0	65.8	69.8
Games Workshop	14000.00	525.16	561.13	26.7	24.9	16.6	15.5	4%	4%	3.3%	3.5%	586.6	630.0	229.1	244.3	270.3	289.8
Glanbia	11.12	1.27	1.42	8.7	7.0	6.1	10.1	4%	12%	4.5%	4.0%	3843.3	3943.3	344.7	383.0	492.1	531.7
Glenveagh Proper	1.53	0.19	0.21	8.0	7.3	8.9	7.5	10%	19%	0.0%	0.0%	1014.9	1074.2	140.9	146.8	146.0	152.1
Grafton Group	869.60	69.87	77.31	12.4	11.2	6.0	5.5	5%	7%	4.4%	4.6%	2501.5	2592.6	159.3	176.0	309.3	330.0
Greencoast Renewa	0.74	0.14	0.14	5.1	5.1	13.7	15.0	19%	19%	9.6%	10.1%	216.6	215.4	189.2	187.9	189.2	187.9
Greencore	177.20																
Greggs	1798.00	139.34	146.38	12.9	12.3	6.2	5.7	nm	4%	3.9%	4.1%	2189.2	2375.6	204.4	218.0	368.7	403.3
Hammerston	250.20																
Heidelberg Mater	166.60	10.42	FALSE	16.0	FALSE	8.8	FALSE	5%	FALSE	1.5%	FALSE	23477.2	FALSE	2852.1	FALSE	3782.0	FALSE
Hostelworld Group	127.50	0.17	0.20	8.9	7.5	6.5	4.9	11%	13%	0.0%	0.0%	104.7	114.1	10.8	13.9	25.5	29.1
Howden Joinery	738.00	47.32	50.44	15.6	14.6	8.9	8.6	7%	5%	3.3%	3.7%	2403.7	2517.3	352.7	369.7	506.8	527.6
IAG	290.80	0.61	0.71	5.7	4.9	2.7	2.3	16%	22%	3.4%	4.3%	33582.5	35002.4	4649.0	4936.6	7268.5	7790.6
Ibstock	175.00	11.00	13.41	15.9	13.0	8.8	7.6	7%	6%	3.1%	4.0%	424.5	456.0	64.9	77.6	95.7	109.6
ICG	5.60	0.38	0.41	14.7	13.6	7.3	6.6	12%	5%	2.9%	3.1%	641.4	661.0	74.0	79.5	143.0	148.5
IREX REIT	0.94	0.14	FALSE	6.9	FALSE	61.2	0.0	5%	FALSE	5.9%	FALSE	65.2	FALSE	85.3	FALSE		FALSE
ITM Power	27.54	-5.68	-5.22	nm	nm	nm	nm	nm	nm	0.0%	0.0%	22.0	53.6	-43.9	-40.0	-36.1	-30.2
J.D. Wetherspoon	560.00	50.30	56.36	11.1	9.9	7.3	7.0	3%	5%	2.1%	2.1%	2117.8	2229.4	141.4	150.1	249.6	258.8
Jet2	1336.00	180.21	184.27	7.4	7.3	0.8	0.5	23%	15%	0.3%	1.4%	7366.6	8093.4	516.1	503.8	795.9	836.4
Johnson Matthey	1365.00	170.95	183.63	8.0	7.4	5.5	5.0	5%	13%	5.9%	6.2%	4033.1	3967.9	462.6	501.7	611.7	656.1
Kainos Group	695.00	30.50	36.18	22.8	19.2	13.4	11.2	6%	7%	3.5%	3.5%	365.1	382.2	47.2	56.1	54.1	64.0
Kerry Group	95.75	5.17	5.70	18.5	16.8	13.4	12.1	4%	5%	1.5%	1.6%	8189.1	8477.8	1027.5	1125.6	1344.3	1445.9
Kingfisher	248.10	20.31	21.55	12.2	11.5	5.8	5.3	10%	9%	5.0%	5.0%	12801.3	13298.6	622.2	661.3	1319.3	1389.5
Kingspan	77.55	3.99	4.51	19.4	17.2	12.6	11.1	4%	4%	0.8%	0.8%	9370.5	9996.3	926.6	1034.9	1226.6	1352.9
Lufthansa	7.21	1.32	1.50	5.5	4.8	3.0	2.6	20%	25%	4.2%	4.2%	39356.7	40995.4	2328.1	2584.6	4702.1	5068.3
Marston's	36.45	7.74	8.85	4.7	4.1	7.2	6.6	16%	19%	0.0%	0.0%	927.3	157.7	166.2	202.3	211.1	
Mitchells & Butlers	218.50	28.18	30.39	7.8	7.2	5.8	5.4	9%	7%	0.0%	0.0%	2711.6	2815.9	322.1	334.7	456.3	473.1
Molten Ventures	274.50	48.11	47.64	5.7	5.8	5.2	5.4	13%	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
NCC Group	137.80	5.53	7.09	24.9	19.4	9.2	8.1	5%	5%	0.1%	0.1%	329.1	348.7	29.2	35.1	49.9	55.9
Origin Enterprises	3.10	0.52	0.58	6.0	5.3	5.5	5.2	nm	12%	5.5%	5.8%	2222.9	2289.2	78.9	85.1	112.6	119.5
Permanent TSB	1.68	0.11	0.25	14.9	6.7	0.4	0.4			2.1%	10.4%	657.9	708.7	137.4	197.2		
Persimmon	1180.00	93.72	111.41	12.6	10.6	1.0	1.0	4%	8%	3.4%	3.4%	3456.4	3755.4	438.9	516.7	461.6	541.5
Playtech	727.00																
Rank Group	84.40	7.76	8.63	10.9	9.8	5.0	4.7	1%	2%	1.5%	1.7%	782.2	818.7	55.7	60.7	105.7	112.1
Ryanair	20.19	1.45	1.97	13.9	10.3	7.4	5.5	7%	9%	2.0%	2.1%	13949.8	14713.9	1611.9	2212.5	2860.1	3529.7
SLG	12.74																
Smurfit Westrock	44.96	2.76	3.70	16.3	12.2	7.1	6.1	6%	7%	3.3%	3.8%	32739.6	34883.1	2521.9	3090.6	5082.3	5827.1
SSP Group	155.80	12.23	14.08	12.7	11.1	6.2	6.1	nm	nm	2.8%	3.2%	3683.7	3898.3	280.1	305.9	634.8	659.9
Tate & Lyle	522.50	48.82	49.43	10.7	10.6	9.9	7.4	6%	6%	3.8%	3.5%	1754.2	2185.7	280.9	345.8	373.2	490.1
Taylor Wimpey	108.05	8.80	10.18	12.3	10.6	0.9	0.9	8%	8%	8.8%	8.8%	3680.9	3924.0	450.9	520.4	454.2	523.4
Everplay Group	255.00	24.51	24.93	10.4	10.2	3.8	3.4	6%	7%	0.0%	0.0%	169.7	173.9	32.2	33.0	66.0	66.