

Goodbody Market Commentary Metrics



15 November 2024																		
Company	Price	EPS		PE		EV/EBITDA		FCF Yield		Div. Yield		Sales		Op Profit		EBITDA		
	1c	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	2024	2025	
AIB Group	5.36	0.65	0.55	8.2	9.7	1.0	0.9			6.7%	5.7%	4445.6	4226.8	2133.4	1835.9			
Air France-KLM	7.68	3.76	4.50	2.0	1.7	2.8	2.5	44%	46%	0.0%	0.0%	31439.5	32867.2	1702.2	1940.6	4340.3	4627.8	
B&M European Value Retail	398.80	36.93	38.40	14.6	10.4	10.0	7.3	6%	9%	2.7%	3.9%	5484.0	5736.1	548.0	570.2	630.0	655.9	
Bank of Ireland	8.62	1.48	1.25	5.8	6.9	0.7	0.6			6.9%	5.8%	4372.9	4149.1	1993.0	1706.4			
Bakkavor Group	135.00	11.27	12.38	12.0	10.9	6.0	5.7	10%	7%	5.7%	6.0%	2266.5	2255.6	111.2	118.9	184.5	192.4	
Barratt Redrow	410.20	27.03	29.84	15.2	13.7	0.7	0.7	1%	6%	3.6%	4.0%	4118.0	4332.0	378.5	421.9	381.0	425.1	
Bellway	2548.00	119.91	160.68	20.8	15.9	0.9	0.8	nm	6%	2.2%	2.4%	2380.2	2700.1	235.8	287.6	243.2	293.7	
Berkeley Group	4312.00	362.23	285.85	11.9	15.1	1.3	1.3	5%	7%	6.1%	6.1%	2579.9	2383.5	580.6	467.1	526.8	443.8	
Breedon Group	452.00	31.92	35.17	14.2	12.9	7.2	6.4	4%	7%	3.1%	3.3%	1603.6	1708.4	163.4	180.1	265.0	288.2	
Britvic	1287.00	67.66	74.62	19.0	17.2	12.0	11.1	4%	5%	2.7%	3.0%	1909.1	2002.4	240.8	261.7	314.4	338.6	
Bytes Technology	464.20	0.00	0.00	nm	nm	17.2	15.2	4%	5%	5.5%	4.8%	208.7	232.6	55.7	61.3	58.1	63.8	
C & C Group	149.40	0.08	0.12	20.5	14.9	9.7	8.5	7%	5%	3.5%	3.4%	1652.5	1678.0	60.0	80.3	93.7	114.3	
Cairn Homes	2.19	0.18	0.20	12.4	10.9	9.2	8.6	11%	8%	3.5%	3.9%	856.6	940.8	144.9	156.0	147.2	158.8	
Ceres Power	174.10	-6.58	-8.62	nm	nm	nm	nm	nm	nm	0.0%	0.0%	64.9	68.8	-21.3	-7.6	-11.5		
Coca-Cola HBC	2768.00	2.18	2.42	15.3	13.8	9.0	8.3	4%	5%	2.9%	3.3%	10554.5	11253.6	1154.4	1270.5	1575.0	1716.8	
Compass Group	2625.00	1.19	1.31	28.1	25.5	16.0	15.0	3%	3%	1.8%	2.0%	41711.1	44610.0	2967.5	3233.5	3997.8	4286.3	
ConvaTec Group	247.40	0.16	0.17	20.2	18.3	11.8	10.5	4%	5%	2.0%	2.1%	2235.7	2361.4	478.4	517.1	614.2	652.9	
Cranswick	5050.00	242.83	265.78	14.6	19.0	7.6	9.2	7%	5%	2.3%	1.7%	2599.3	2758.4	167.3	195.9	266.8	282.3	
CRH	99.87	554.69	606.43	18.0	16.5	11.5	10.5	6%	9%	1.4%	1.5%	35444.8	37684.8	5271.6	5858.4	6923.4	7611.4	
Dalata Hotel Group	4.49	0.33	0.38	13.4	11.7	8.9	7.9	9%	7%	2.8%	3.1%	650.7	684.2	157.0	176.5	229.8	252.6	
Darktrace	576.80	0.78	0.95	9.4	7.7	41.3	33.4	1%	2%	0.0%	0.0%	677.8	799.6	64.4	80.0	107.9	130.3	
Datalx	0.35																	
DCC	5420.00	454.49	481.01	11.0	11.3	6.7	6.2	12%	9%	3.9%	3.8%	19858.8	20536.6	568.7	601.7	923.0	963.0	
Devolver Digital	25.50	-0.76	2.44	nm	13.3	37.6	3.6	nm	11%	0.0%	0.0%	100.9	109.6	-3.7	15.0	1.3	19.6	
Diageo	2365.50	1.79	1.72	20.8	17.5	15.8	13.6	3%	5%	2.8%	3.6%	20269.0	20520.8	6359.0	6185.3	6438.0	6506.0	
Dole	14.81	126.50	140.77	11.7	10.5	5.5	5.1	7%	10%	2.2%	2.4%	8307.8	8400.0	270.2	279.5	382.8	392.8	
DS Smith	557.50	33.07	34.45	16.9	16.2	9.8	9.7	nm	3%	3.2%	3.4%	7426.9	7445.9	597.5	604.5	1025.5	1037.5	
easyJet	517.40	63.95	67.69	8.1	7.6	2.9	2.5	5%	14%	2.3%	2.6%	9260.2	9736.4	658.3	695.2	1405.6	1549.7	
Entain	748.80	26.76	53.01	28.0	14.1	8.3	7.8	3%	7%	1.1%	2.1%	5136.8	5325.7	593.0	770.3	1072.9	1131.2	
Evoke	58.25	7.64	17.12	7.6	3.4	6.0	4.9	1%	45%	0.0%	0.0%	1783.6	1883.0	210.7	255.5	331.3	380.7	
FBD Holdings	12.25	1.64	1.66	7.5	7.4	1.0	1.0			9.8%	10.2%	412.5	422.9	52.9	56.6			
Ferguson	16190.00																	
Fever-Tree Drinks	707.50	26.69	34.07	26.5	20.8	14.3	11.2	6%	5%	2.5%	2.6%	372.3	391.7	39.1	50.4	51.6	63.8	
FD Technologies	1790.00	-28.22	-21.99	nm	19.3	27.6	27.6	5%	nm	0.0%	0.0%	277.8	247.7	2.6	-3.2	23.0	19.2	
Flutter Entertainment	267.91	6.62	9.10	40.5	29.4	20.5	15.9	2%	3%	0.0%	0.0%	14228.5	15944.4	2061.7	2659.2	2571.7	3219.2	
Forterra	179.80	10.49	12.86	17.1	14.0	8.7	7.4	2%	8%	2.4%	3.6%	338.8	363.7	34.7	41.0	55.0	62.3	
Frontier Developments	235.00	-2735.44	587.49	nm	0.4	34.4	3.7	8%	nm	0.0%	0.0%	89.3	90.7	-31.9	-8.2	3.2	27.2	
Games Workshop Group	11980.00	458.78	515.72	26.1	23.2	16.0	15.0	4%	4%	3.5%	3.7%	525.7	571.2	201.8	215.2	240.8	256.2	
Glanbia	15.67	1.40	1.42	11.2	11.0	8.6	8.3	8%	8%	2.7%	3.0%	3928.3	4218.5	395.3	393.5	542.0	542.4	
Glenveagh Properties	1.60	0.17	0.19	9.4	8.4	10.4	9.0	nm	15%	0.0%	0.0%	955.7	1017.5	132.7	141.9	136.6	146.1	
Grafton Group	955.00	64.83	72.28	14.7	13.2	8.9	8.2	7%	4%	3.9%	4.2%	2270.2	2478.7	147.0	164.9	279.0	301.9	
Greencoat Renewables	0.82	0.14	0.14	5.8	5.7	13.0	14.2	7%	17%	8.2%	8.7%	216.9	216.6	189.4	189.2	189.4	189.2	
Greencore	199.00	12.47	14.10	16.0	14.1	7.5	7.1	6%	6%	0.9%	1.4%	1810.4	1888.7	92.4	97.8	151.4	158.1	
Greggs	2654.00	137.95	153.18	19.2	17.3	8.7	7.9	nm	2%	2.6%	2.9%	2048.4	2268.2	195.7	220.8	340.9	382.7	
Hammerson	277.20																	
Heidelberg Materials	118.80	9.74	10.42	12.2	11.4	7.3	6.6	7%	8%	2.1%	2.1%	22693.8	23477.2	2683.4	2852.1	3625.8	3782.0	
Hostelworld Group	135.00	0.14	0.17	12.0	9.5	9.2	7.0	8%	11%	0.0%	0.0%	94.6	104.7	7.3	10.8	21.4	25.5	
Howden Joinery	824.00	46.11	47.32	17.9	17.4	10.3	9.8	2%	6%	2.6%	2.9%	2329.9	2403.7	338.8	352.7	490.0	506.8	
IAG	239.20	0.44	0.47	6.6	6.1	3.2	2.9	nm	nm	0.5%	2.8%	31596.1	32808.0	3540.8	3758.4	5794.3	6204.4	
Ibstock	187.80	8.63	11.00	21.8	17.1	11.1	9.4	1%	6%	2.4%	2.9%	395.1	424.5	54.0	64.9	83.4	95.7	
ICG	5.52	0.34	0.38	16.1	14.5	8.1	7.2	10%	12%	2.8%	3.0%	614.1	641.4	67.8	74.0	136.8	143.0	
IRES REIT	0.87	0.07	0.14	11.8	6.3	59.3	0.6	3%	5%	6.0%	6.4%	65.1	65.2	56.9	87.3	57.6	85.1	
ITM Power	35.26	-7.93	-7.44	nm	nm	nm	nm	nm	nm	0.0%	0.0%	18.2	51.7	-54.5	-51.8	-49.4	-39.3	
J D Wetherspoon	623.50	46.80	53.40	15.8	11.7	8.1	7.3	5%	10%	1.6%	1.9%	2035.5	2107.7	139.5	152.8	241.7	255.0	
Jet2	1524.00	164.89	168.15	7.4	9.1	1.6	1.6	27%	18%	1.0%	1.1%	6255.3	7219.2	428.2	438.8	677.0	718.2	
Johnson Matthey	1502.00	156.57	170.95	9.6	8.8	6.6	5.9	13%	5%	5.1%	5.4%	4045.0	4033.1	429.5	467.6	558.9	611.7	
Kainos Group	876.00	39.04	30.50	29.9	28.7	19.7	17.5	5%	5%	2.1%	2.8%	382.4	365.1	60.8	69.0	69.0	54.1	
Kerry Group	90.85	4.63	5.17	19.6	17.6	14.2	12.8	4%	4%	1.4%	1.5%	7906.6	8189.1	933.3	1027.5	1240.1	1344.3	
Keywords Studios	2446.00	1.23	1.31	23.9	22.5	16.8	15.4	4%	4%	0.1%	0.1%	903.0	966.2	98.1	110.6	139.0	146.2	
Kingfisher	289.70	21.60	20.84	11.1	13.9	5.2	6.4	11%	9%	5.2%	4.3%	12980.0	12850.4	673.0	626.0	1315.0	1324.4	
Kingspan	74.95	3.60	3.99	20.8	18.8	13.8	12.2	4%	4%	0.8%	0.8%	8491.6	9370.5	830.0	926.6	1109.5	1226.6	
LungLife AI	0.11	-0.16	-0.14	nm	nm	nm	nm	nm	nm	0.0%	0.0%	4.4	8.6	-4.0	-3.5	-3.8	-3.2	
Lufthansa	6.24	1.18	1.53	5.3	4.1	2.8	2.2	21%	33%	4.8%	4.8%	38578.4	40901.3	2183.0	2780.3	4575.1	5208.1	
Marston's	36.45	5.97	8.02	6.1	4.5	7.6	7.4	15%	18%	0.0%	0.0%	893.9	919.8	156.8	193.0	193.0	202.9	
Mitchells & Butlers	234.50	24.48	27.89	9.6	8.4	6.7	6.1	9%	8%	0.0%	0.0%	2653.1	2778.9	298.2	321.0	435.4	462.4	
Molten Ventures	333.00	-17.00	58.89	nm	5.7	nm	6.6	nm	nm	0.0%	0.0%	-29.0	123.3	-30.8	121.3	-50.2	98.9	
Mondi	1164.50	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	FALSE	
NCC Group	158.60	0.00	0.00	nm	nm	15.1	12.1	4%	6%	0.1%	0.1%	330.4	338.5	16.0	25.0	37.7	46.0	
Origin Enterprises	3.05	0.48	0.52	6.7	5.9	5.4	5.4	nm	nm	5.2%	5.6%	2045.7	2222.9	76.6	78.9	107.4	112.6	
Permanent TSB	1.52	0.10	0.14	15.6	10.7	0.4	0.4			0.0%	3.7%	721.7	751.9	121.3	149.2			
Persimmon	1270.00	77.36	92.27	16.4	13.8	1.2	1.1	nm	7%	3.1%	3.1%	2808.2	3118.2	364.7	434.4	384.2	454.5	
Playtech	732.00																	
Rank Group	87.00	6.16	7.76	12.8	11.2	5.6	5.1	5%	1%	0.0%	1.5%	734.8	782.2	46.4	55.7	94.1	105.7	
Renalytix	7.75	-0.41	-0.34	nm	nm	nm	nm	nm	nm	0.0%	0.0%	10.4	28.1	-37.0	-30.9	-35.1	-29.1	
Ryanair	18.90	1.67	1.42	10.2	13.3	5.9	6.6	5%	9%	1.0%	2.1%	13443.8	13918.1	2060.7	1666.6	3120.2	2971.2	