

## Analyst consensus



Updated as of 22nd January 2025

€ millions, unless otherwise specified	FY2025E	FY2025E	FY2025E	Contr.
	Average	High	Low	
<b>Total revenue</b>	<b>83.9</b>	<b>84.2</b>	<b>83.7</b>	<b>8</b>
Auto	32.1	32.4	31.5	8
Real Estate	22.3	22.5	21.9	8
Jobs & Services	16.2	16.6	15.9	8
Generalist	13.4	13.7	13.2	8
Operating Profit	53.2	56.2	48.2	6
Adjusted Operating Profit	64.5	64.6	64.4	6
<b>EBITDA</b>	<b>65.2</b>	<b>65.4</b>	<b>65.0</b>	<b>8</b>
EBITDA margin	78%	78%	78%	8
Profit	43.9	47.0	40.7	8
<b>Adjusted net income</b>	<b>54.1</b>	<b>55.0</b>	<b>51.4</b>	<b>8</b>
Basic EPS, € cents	9.11	9.81	8.37	8
Adjusted basic EPS, € cents	11.20	11.39	10.70	8

€ millions, unless otherwise specified	FY2026E	FY2026E	FY2026E	Contr.
	Average	High	Low	
<b>Total revenue</b>	<b>96.2</b>	<b>97.2</b>	<b>94.6</b>	<b>8</b>
Auto	37.1	37.9	36.5	8
Real Estate	25.8	26.4	25.2	8
Jobs & Services	18.8	19.5	17.9	8
Generalist	14.5	15.3	13.8	8
Operating Profit	65.4	68.7	57.0	6
Adjusted Operating Profit	74.5	75.2	73.2	6
<b>EBITDA</b>	<b>75.3</b>	<b>75.9</b>	<b>73.9</b>	<b>8</b>
EBITDA margin	78%	79%	78%	8
Profit	54.8	58.0	49.2	8
<b>Adjusted net income</b>	<b>63.2</b>	<b>65.7</b>	<b>59.1</b>	<b>8</b>
Basic EPS, € cents	11.62	12.66	10.54	8
Adjusted basic EPS, € cents	13.40	13.75	12.65	8

€ millions, unless otherwise specified	FY2027E	FY2027E	FY2027E	Contr.
	Average	High	Low	
<b>Total revenue</b>	<b>110.0</b>	<b>112.0</b>	<b>105.4</b>	<b>8</b>
Auto	42.7	44.2	41.4	8
Real Estate	29.8	30.7	28.5	8
Jobs & Services	21.8	23.0	20.5	8
Generalist	15.7	16.8	14.2	8
Operating Profit	76.7	80.9	65.8	6
Adjusted Operating Profit	85.6	87.4	82.0	6
<b>EBITDA</b>	<b>86.5</b>	<b>88.2</b>	<b>82.7</b>	<b>8</b>
EBITDA margin	79%	79%	78%	8
Profit	64.8	69.0	57.4	8
<b>Adjusted net income</b>	<b>72.9</b>	<b>74.6</b>	<b>66.4</b>	<b>8</b>
Basic EPS, € cents	14.07	15.89	12.48	8
Adjusted basic EPS, € cents	15.81	17.05	14.63	8

Note: financial year (FY) starts on May 1st and ends on April 30th

## **Contributors**

<b>House</b>	<b>Analyst</b>	<b>Date of forecast</b>	<b>Target price, pence</b>	<b>Recommendation</b>
Berenberg	Ciarán Donnelly	05/12/2024	395	Buy
BNP Paribas Exane	William Packer	05/12/2024	375	Outperform
BofA Securities	David Amira	05/12/2024	350	Neutral
Deutsche Numis	Gareth-A Davies	11/12/2024	373	Hold
Investec	Alastair Reid	15/01/2025	340	Hold
Jefferies	Weng Lum Khoo	21/01/2025	300	Hold
Panmure Liberum	Sean Kealy	20/01/2025	395	Buy
Peel Hunt	Jessica Pok	12/12/2024	350	Hold

(all of which have been confirmed immediately after the date of forecast)

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