

ORACLE CORPORATION
SUPPLEMENTAL ANALYSIS OF OPERATIONS & HEADCOUNT

(in thousands, except per share & headcount data)

	Fiscal 1998					Fiscal 1999				
	Actual Q1	Actual Q2	Actual Q3	Actual Q4	TOTAL	Actual Q1	Actual Q2	Actual Q3	Actual Q4	TOTAL
REVENUES										
License	\$ 505,377	\$ 621,168	\$ 753,193	\$ 1,209,323	\$ 3,089,061	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868
Support	405,129	427,756	447,995	513,237	1,794,117	524,856	566,440	583,596	670,632	2,345,524
Total Product Revenues (1)	910,506	1,048,924	1,201,188	1,722,560	4,883,178	1,082,469	1,311,687	1,388,203	2,154,033	5,936,392
Consulting & education	433,057	540,605	526,241	656,356	2,156,259	641,790	722,076	669,585	759,911	2,793,362
Other	25,266	24,198	21,328	33,637	104,429	24,851	22,181	21,131	29,334	97,498
Total Revenues	1,368,829	1,613,727	1,748,757	2,412,553	7,143,866	1,749,110	2,055,944	2,078,919	2,943,278	8,827,252
OPERATING EXPENSES										
Sales and marketing	449,451	528,490	567,619	825,746	2,371,306	510,076	591,754	566,756	953,792	2,622,379
Cost of services (2)	468,167	548,631	586,398	670,412	2,273,607	679,290	779,847	792,023	812,988	3,064,148
Research and development	159,667	183,217	184,106	192,153	719,143	187,623	200,678	209,798	243,307	841,406
General and administrative	75,514	81,383	92,361	119,298	368,556	94,284	101,598	103,663	126,892	426,438
Acquired in-process R & D	167,054	-	-	-	167,054	-	-	-	-	-
Total Operating Expenses	1,319,853	1,341,721	1,430,484	1,807,609	5,899,666	1,471,273	1,673,877	1,672,240	2,136,979	6,954,371
OPERATING INCOME	48,976	272,006	318,273	604,944	1,244,200	277,837	382,067	406,679	806,299	1,872,881
Other income (expense) (4)	39,974	16,248	12,615	14,782	83,619	22,166	28,654	37,656	20,721	109,197
Income Before Taxes	88,950	288,254	330,888	619,726	1,327,819	300,003	410,721	444,335	827,020	1,982,078
Provision for Income Taxes	80,479	100,930	115,811	216,904	514,124	105,001	136,645	151,074	299,600	692,320
NET INCOME	\$ 8,471	\$ 187,324	\$ 215,077	\$ 402,822	\$ 813,695	\$ 195,002	\$ 274,076	\$ 293,261	\$ 527,420	\$ 1,289,758
EARNINGS PER SHARE (3)										
Basic	\$ 0.01	\$ 0.13	\$ 0.15	\$ 0.28	\$ 0.55	\$ 0.13	\$ 0.19	\$ 0.20	\$ 0.37	\$ 0.89
Diluted	\$ 0.01	\$ 0.12	\$ 0.14	\$ 0.27	\$ 0.54	\$ 0.13	\$ 0.19	\$ 0.20	\$ 0.36	\$ 0.87
SHARES OUTSTANDING										
Basic	1,468,928	1,473,737	1,462,421	1,460,511	1,466,399	1,459,341	1,445,760	1,440,352	1,436,898	1,445,588
Diluted	1,509,399	1,512,837	1,487,462	1,488,654	1,499,588	1,483,724	1,474,905	1,495,461	1,482,809	1,484,225

(1) Product Revenues consist of new license revenues, license renewals, and product support.

(2) Cost of services includes support, consulting and education related expenses.

(3) Q1 Fiscal 1998 earnings per share before the effect of the adjustment for acquired in-process research and development was \$0.10 per share. For the fiscal year ended 1998, earnings per share before the effect of the adjustment for acquired in-process research and development was \$0.64 per share.

(4) Other income (expense) includes a gain on the sale of existing shares in Oracle Japan in the amount of \$24,457 in Q3 Fiscal 1999

	Fiscal 1998					Fiscal 1999				
	Actual Q1	Actual Q2	Actual Q3	Actual Q4	TOTAL	Actual Q1	Actual Q2	Actual Q3	Actual Q4	TOTAL
REVENUES										
Oracle Americas	\$ 733,147	\$ 861,666	\$ 995,219	\$ 1,458,499	\$ 4,048,531	\$ 1,003,126	\$ 1,121,560	\$ 1,165,154	\$ 1,763,328	\$ 5,053,169
Oracle Europe/Middle East/Africa	424,352	541,195	577,039	754,754	2,297,340	564,773	709,519	693,675	887,268	2,855,235
Oracle Asia Pacific	211,330	210,866	176,499	199,300	797,995	181,211	224,865	220,090	292,682	918,848
Total Revenues	\$ 1,368,829	\$ 1,613,727	\$ 1,748,757	\$ 2,412,553	\$ 7,143,866	\$ 1,749,110	\$ 2,055,944	\$ 2,078,919	\$ 2,943,278	\$ 8,827,252

	Fiscal 1998				Fiscal 1999			
	Actual Q1	Actual Q2	Actual Q3	Actual Q4	Actual Q1	Actual Q2	Actual Q3	Actual Q4
HEADCOUNT								
Sales and services	22,855	25,032	26,512	27,523	29,114	31,076	32,629	33,056
Marketing	939	885	900	887	812	842	961	994
Research and development	4,523	4,613	4,710	4,826	5,024	5,180	5,396	5,781
General and administrative	3,084	3,245	3,391	3,566	3,679	3,697	3,797	3,969
Total Company	31,401	33,775	35,513	36,802	38,629	40,795	42,783	43,800
International	15,893	17,043	17,762	18,463	19,128	20,177	20,901	21,670
Domestic	15,508	16,732	17,751	18,339	19,501	20,618	21,882	22,130
Total Company	31,401	33,775	35,513	36,802	38,629	40,795	42,783	43,800

ORACLE CORPORATION
Q4 FISCAL 1999 RESULTS
SUPPLEMENTAL REVENUE ANALYSES

(\$ in thousands)
(unaudited)

	Fiscal 1998					Fiscal 1999				
	Actual Q1	Actual Q2	Actual Q3	Actual Q4	Total	Actual Q1	Actual Q2	Actual Q3	Actual Q4	Total
APPLICATIONS REVENUE ANALYSIS										
APPLICATIONS LICENSE	\$ 98,429	\$ 108,340	\$ 139,700	\$ 215,811	\$ 562,281	\$ 98,090	\$ 128,451	\$ 147,351	\$ 277,150	\$ 651,042
APPLICATIONS RELATED SERVICES (1) (2)	250,521	320,938	306,289	401,062	1,278,809	396,515	449,560	439,647	488,832	1,774,554
TOTAL APPLICATIONS REVENUES	\$ 348,950	\$ 429,278	\$ 445,989	\$ 616,873	\$ 1,841,090	\$ 494,605	\$ 578,011	\$ 586,998	\$ 765,982	\$ 2,425,596
AS REPORTED REVENUE GROWTH RATES										
APPLICATIONS LICENSE	95%	7%	30%	-1%	18%	0%	19%	5%	28%	16%
APPLICATIONS RELATED SERVICES	101%	110%	66%	82%	87%	58%	40%	44%	22%	39%
TOTAL APPLICATIONS REVENUES	99%	69%	53%	40%	59%	42%	35%	32%	24%	32%
DATABASE REVENUE ANALYSIS										
SERVER AND TOOLS LICENSE	\$ 406,947	\$ 512,828	\$ 613,493	\$ 993,512	\$ 2,526,781	\$ 459,523	\$ 616,796	\$ 657,256	\$ 1,206,251	\$ 2,939,826
SERVER AND TOOLS RELATED SERVICES (1) (2)	612,932	671,621	689,275	802,168	2,775,995	794,982	861,137	834,665	971,045	3,461,829
TOTAL DATABASE REVENUES	\$ 1,019,879	\$ 1,184,449	\$ 1,302,768	\$ 1,795,680	\$ 5,302,776	\$ 1,254,505	\$ 1,477,933	\$ 1,491,921	\$ 2,177,296	\$ 6,401,655
AS REPORTED REVENUE GROWTH RATES										
SERVER AND TOOLS LICENSE	3%	2%	10%	12%	8%	13%	20%	7%	21%	16%
SERVER AND TOOLS RELATED SERVICES	27%	22%	32%	29%	27%	30%	28%	21%	21%	25%
TOTAL DATABASE REVENUES	16%	12%	21%	19%	17%	23%	25%	15%	21%	21%
PRODUCT REVENUE ANALYSIS										
LICENSE	\$ 505,377	\$ 621,168	\$ 753,193	\$ 1,209,323	\$ 3,089,061	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868
SUPPORT	405,129	427,756	447,995	513,237	1,794,117	524,856	566,440	583,596	670,632	2,345,524
TOTAL PRODUCT REVENUES (3)	910,506	1,048,924	1,201,188	1,722,560	4,883,178	1,082,469	1,311,687	1,388,203	2,154,033	5,936,392
CONSULTING & EDUCATION	433,057	540,605	526,241	656,356	2,156,259	641,790	722,076	669,585	759,911	2,793,362
OTHER (4)	25,266	24,198	21,328	33,637	104,429	24,851	22,181	21,131	29,334	97,498
TOTAL REVENUES	\$ 1,368,829	\$ 1,613,727	\$ 1,748,757	\$ 2,412,553	\$ 7,143,866	\$ 1,749,110	\$ 2,055,944	\$ 2,078,919	\$ 2,943,278	\$ 8,827,252
AS REPORTED REVENUE GROWTH RATES										
LICENSE	14%	2%	13%	9%	9%	10%	20%	7%	23%	16%
SUPPORT	41%	35%	35%	34%	36%	30%	32%	30%	31%	31%
TOTAL PRODUCT REVENUES	24%	14%	20%	16%	18%	19%	25%	16%	25%	22%
CONSULTING & EDUCATION REVENUES	43%	46%	47%	51%	47%	48%	34%	27%	16%	30%
TOTAL REVENUES	30%	23%	27%	24%	26%	28%	27%	19%	22%	24%
LOCAL CURRENCY GROWTH RATES										
LICENSE	20%	8%	18%	12%	14%	16%	21%	7%	24%	18%
SUPPORT	47%	41%	41%	39%	42%	34%	34%	30%	33%	33%
TOTAL PRODUCT REVENUES	31%	19%	26%	19%	23%	24%	26%	16%	27%	23%
CONSULTING & EDUCATION REVENUES	48%	53%	52%	54%	52%	52%	34%	27%	18%	31%
TOTAL REVENUES	36%	29%	33%	28%	31%	33%	28%	19%	24%	25%

(1) Services revenue analysis represents the Company's estimate of support, consulting and education revenues related to its product revenue categories.

The amounts do not include the pull-through of Server or Tools license revenues in Applications sales transactions.

(2) The services component of the Q3 and Q4 FY98 Applications & Database revenue estimates have been revised. The reported amount of \$302m and \$399m for Applications have been increased to \$306m and \$401m respectively. Correspondingly, reported amounts of \$693m and \$805m for Database are decreased to \$689 and \$802 respectively.

(3) Product Revenues consist of new license revenues, license renewals, and product support.

(4) Includes systems integration, documentation and miscellaneous other revenues.

ORACLE CORPORATION
Q4 FISCAL 1999 RESULTS
SUPPLEMENTAL GEOGRAPHIC LICENSE REVENUE ANALYSIS

(\$ in thousands)
(unaudited)

LICENSE REVENUES	Fiscal 1998					Fiscal 1999				
	Actual Q1	Actual Q2	Actual Q3	Actual Q4	Total	Actual Q1	Actual Q2	Actual Q3	Actual Q4	Total
AMERICAS										
SERVERS	\$ 152,475	\$ 207,766	\$ 267,160	\$ 521,192	\$ 1,148,593	\$ 188,203	\$ 258,311	\$ 295,572	\$ 643,387	\$ 1,385,473
TOOLS	21,194	35,165	41,192	75,877	173,428	22,802	28,034	30,620	69,184	150,640
APPLICATIONS	65,197	69,315	107,975	160,905	403,392	70,010	90,592	100,247	201,379	462,228
TOTAL LICENSE REVENUES	\$ 238,866	\$ 312,246	\$ 416,327	\$ 757,974	\$ 1,725,413	\$ 281,015	\$ 376,937	\$ 426,439	\$ 913,950	\$ 1,998,341
AS REPORTED REVENUE GROWTH RATES										
SERVERS	0%	15%	34%	24%	20%	23%	24%	11%	23%	21%
TOOLS	-35%	3%	25%	26%	9%	8%	-20%	-26%	-9%	-13%
APPLICATIONS	102%	-11%	35%	1%	15%	7%	31%	-7%	25%	15%
TOTAL LICENSE REVENUES	10%	6%	33%	18%	18%	18%	21%	2%	21%	16%
LOCAL CURRENCY GROWTH RATES										
SERVERS	1%	15%	35%	24%	21%	25%	26%	13%	25%	23%
TOOLS	-35%	4%	27%	27%	9%	9%	-19%	-24%	-7%	-12%
APPLICATIONS	103%	-11%	35%	1%	15%	8%	31%	-7%	25%	15%
TOTAL LICENSE REVENUES	10%	7%	34%	19%	18%	19%	22%	4%	22%	17%
EMEA										
SERVERS	\$ 111,804	\$ 136,916	\$ 194,315	\$ 264,866	\$ 707,901	\$ 145,184	\$ 193,475	\$ 193,102	\$ 317,654	\$ 849,415
TOOLS	23,464	24,744	25,006	34,849	108,063	19,559	24,430	28,019	32,786	104,795
APPLICATIONS	16,568	32,688	25,252	47,804	122,312	20,970	29,653	40,173	60,242	151,038
TOTAL LICENSE REVENUES	\$ 151,836	\$ 194,348	\$ 244,573	\$ 347,519	\$ 938,276	\$ 185,713	\$ 247,558	\$ 261,294	\$ 410,682	\$ 1,105,248
AS REPORTED REVENUE GROWTH RATES										
SERVERS	9%	1%	10%	15%	10%	30%	-41%	-1%	20%	20%
TOOLS	31%	0%	-19%	-10%	-4%	-17%	-1%	12%	-6%	-3%
APPLICATIONS	25%	96%	16%	3%	25%	27%	-9%	59%	26%	23%
TOTAL LICENSE REVENUES	14%	10%	7%	10%	10%	22%	27%	7%	18%	18%
LOCAL CURRENCY GROWTH RATES										
SERVERS	23%	10%	17%	18%	17%	32%	39%	-1%	25%	21%
TOOLS	45%	8%	-14%	-7%	2%	-16%	-2%	12%	-2%	-2%
APPLICATIONS	35%	110%	25%	6%	31%	27%	-10%	57%	31%	25%
TOTAL LICENSE REVENUES	27%	19%	14%	13%	17%	24%	25%	6%	23%	19%
ASIA PACIFIC										
SERVERS	\$ 85,703	\$ 97,095	\$ 75,471	\$ 87,151	\$ 345,420	\$ 76,225	\$ 103,484	\$ 101,215	\$ 130,971	\$ 411,895
TOOLS	12,307	11,142	10,349	9,577	43,375	7,549	9,062	8,727	12,270	37,608
APPLICATIONS	16,664	6,337	6,473	7,102	36,576	7,110	8,206	6,931	15,529	37,776
TOTAL LICENSE REVENUES	\$ 114,674	\$ 114,574	\$ 92,293	\$ 103,830	\$ 425,371	\$ 90,884	\$ 120,752	\$ 116,873	\$ 158,770	\$ 487,279
AS REPORTED REVENUE GROWTH RATES										
SERVERS	12%	-12%	-25%	-29%	-16%	-11%	7%	34%	50%	19%
TOOLS	-3%	-39%	-40%	-33%	-30%	-39%	-19%	-16%	28%	-13%
APPLICATIONS	234%	-2%	10%	-42%	23%	-57%	29%	7%	119%	3%
TOTAL LICENSE REVENUES	22%	-15%	-25%	-30%	-15%	-21%	5%	27%	53%	15%
LOCAL CURRENCY GROWTH RATES										
SERVERS	22%	-1%	-14%	-16%	-5%	11%	11%	26%	39%	22%
TOOLS	4%	-30%	-28%	-20%	-20%	-22%	-12%	-20%	22%	-8%
APPLICATIONS	276%	14%	28%	-31%	41%	-47%	34%	6%	111%	11%
TOTAL LICENSE REVENUES	33%	-4%	-14%	-18%	-4%	-1%	10%	20%	42%	18%
TOTAL										
SERVERS	\$ 349,983	\$ 441,777	\$ 536,946	\$ 873,209	\$ 2,201,915	\$ 409,612	\$ 555,269	\$ 589,890	\$ 1,092,012	\$ 2,646,783
TOOLS	56,965	71,051	76,547	120,303	324,866	49,911	61,527	67,366	114,239	293,043
APPLICATIONS	98,429	108,340	139,700	215,811	562,280	98,090	128,451	147,351	277,150	651,042
TOTAL LICENSE REVENUES	\$ 505,377	\$ 621,168	\$ 753,193	\$ 1,209,323	\$ 3,089,061	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868

ORACLE CORPORATION
Q4 FISCAL 1999 RESULTS
SUPPLEMENTAL PRODUCT AND PRODUCT LINE REVENUE ANALYSES

(\$ in thousands)
(unaudited)

	Fiscal 1998					Fiscal 1999				
	Actual Q1	Actual Q2	Actual Q3	Actual Q4	Total	Actual Q1	Actual Q2	Actual Q3	Actual Q4	Total
LICENSE REVENUES (1)										
SERVERS	\$ 349,983	\$ 441,777	\$ 536,946	\$ 873,209	\$ 2,201,915	\$ 409,612	\$ 555,269	\$ 589,890	\$ 1,092,012	\$ 2,646,783
TOOLS	56,965	71,051	76,547	120,303	324,866	49,911	61,527	67,366	114,239	293,043
APPLICATIONS	98,429	108,340	139,700	215,811	562,280	98,090	128,451	147,351	277,150	651,042
TOTAL LICENSE REVENUES	\$ 505,377	\$ 621,168	\$ 753,193	\$ 1,209,323	\$ 3,089,061	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868
AS REPORTED REVENUE GROWTH RATES										
SERVERS	6%	3%	13%	13%	10%	17%	26%	10%	25%	20%
TOOLS	-10%	-8%	-5%	6%	-3%	-12%	-13%	-12%	-5%	-10%
APPLICATIONS	95%	7%	30%	-1%	18%	0%	19%	5%	28%	16%
TOTAL LICENSE REVENUES	14%	2%	13%	9%	9%	10%	20%	7%	23%	16%
LOCAL CURRENCY GROWTH RATES										
SERVERS	12%	10%	18%	16%	15%	24%	27%	10%	27%	22%
TOOLS	-6%	-3%	0%	9%	2%	-8%	-12%	-12%	-3%	-8%
APPLICATIONS	102%	9%	33%	0%	20%	3%	19%	6%	29%	17%
TOTAL LICENSE REVENUES	20%	8%	18%	12%	14%	16%	21%	7%	24%	18%
LICENSE REVENUES (1)										
UNIX	\$ 339,225	\$ 415,436	\$ 474,031	\$ 745,165	\$ 1,973,857	\$ 358,448	\$ 465,511	\$ 503,391	\$ 947,871	\$ 2,275,221
WINDOWS	133,216	164,135	239,823	393,955	931,129	173,048	241,022	263,951	462,997	1,141,018
OTHER PLATFORMS (2)	32,936	41,597	39,339	70,203	184,075	26,117	38,714	37,265	72,533	174,629
TOTAL LICENSE REVENUES	\$ 505,377	\$ 621,168	\$ 753,193	\$ 1,209,323	\$ 3,089,061	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868
AS REPORTED REVENUE GROWTH RATES										
UNIX	11%	-4%	2%	-2%	0%	6%	12%	6%	27%	15%
WINDOWS	57%	36%	66%	54%	54%	30%	47%	10%	18%	23%
OTHER PLATFORMS (2)	-37%	-21%	-30%	-22%	-27%	-21%	-7%	-5%	3%	-5%
TOTAL LICENSE REVENUES	14%	2%	13%	9%	9%	10%	20%	7%	23%	16%
LOCAL CURRENCY GROWTH RATES										
UNIX	16%	1%	7%	1%	5%	12%	13%	6%	29%	17%
WINDOWS	67%	45%	73%	59%	61%	36%	48%	10%	19%	24%
OTHER PLATFORMS (2)	-34%	-18%	-27%	-19%	-24%	-18%	-6%	-5%	5%	-4%
TOTAL LICENSE REVENUES	20%	8%	18%	12%	14%	16%	21%	7%	24%	18%

(1) Estimated Product and Product Line revenue amounts reflect the Company's allocations of site licenses and other forms of bundled purchases.

(2) Consists of proprietary and other desktop platforms