

ORACLE CORPORATION

Q4 FISCAL 2000 RESULTS

SUPPLEMENTAL ANALYSIS OF OPERATIONS, GEOGRAPHIC REVENUE AND HEADCOUNT (unaudited, \$ in thousands, except per share & headcount data)

	Fiscal 1999					Fiscal 2000				
	Q1	Q2	Q3	Q4	TOTAL	Q1	Q2	Q3	Q4	TOTAL
OPERATIONS										
REVENUES										
License	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868	\$ 602,646	\$ 877,171	\$ 1,043,206	\$ 1,792,006	\$ 4,315,029
Support	524,856	566,440	583,596	670,632	2,345,524	667,415	720,342	754,413	836,703	2,978,873
Total Product Revenues (1)	1,082,469	1,311,687	1,388,203	2,154,033	5,936,392	1,270,061	1,597,513	1,797,619	2,628,709	7,293,902
Consulting & education	641,790	722,076	669,585	759,911	2,793,362	684,921	698,909	623,632	696,998	2,704,460
Other	24,851	22,181	21,132	29,334	97,498	29,535	25,461	28,167	48,603	131,766
Total Revenues	1,749,110	2,055,944	2,078,920	2,943,278	8,827,252	1,984,517	2,321,883	2,449,418	3,374,310	10,130,128
OPERATING EXPENSES										
Sales and marketing	510,076	591,755	566,756	953,792	2,622,379	538,426	631,433	594,696	852,194	2,616,749
Cost of services (2)	679,290	779,847	792,023	812,988	3,064,148	756,750	753,170	707,261	725,498	2,942,679
Research and development	187,623	200,678	209,798	243,307	841,406	235,941	248,160	255,552	270,229	1,009,882
General and administrative	94,285	101,598	103,663	126,892	426,438	107,537	113,055	122,188	137,878	480,658
Total Operating Expenses	1,471,274	1,673,878	1,672,240	2,136,979	6,954,371	1,638,654	1,745,818	1,679,697	1,985,799	7,049,968
OPERATING INCOME										
	277,836	382,066	406,680	806,299	1,872,881	345,863	576,065	769,721	1,388,511	3,080,160
Net investment gains related to marketable securities (3)	-	-	24,457	-	24,457	-	-	415,459	6,521,496	6,936,955
Other income (expense), net	22,166	28,654	13,199	20,721	84,740	18,347	15,450	24,150	48,372	106,319
INCOME BEFORE TAXES										
	300,002	410,720	444,336	827,020	1,982,078	364,210	591,515	1,209,330	7,958,379	10,123,434
Provision for Income Taxes	105,001	136,645	151,074	299,600	692,320	127,474	207,031	446,154	3,045,972	3,826,631
NET INCOME										
	\$ 195,001	\$ 274,075	\$ 293,262	\$ 527,420	\$ 1,289,758	\$ 236,736	\$ 384,484	\$ 763,176	\$ 4,912,407	\$ 6,296,803
EARNINGS PER SHARE										
Basic	\$ 0.07	\$ 0.09	\$ 0.10	\$ 0.18	\$ 0.45	\$ 0.08	\$ 0.13	\$ 0.27	\$ 1.74	\$ 2.22
Diluted	\$ 0.07	\$ 0.09	\$ 0.10	\$ 0.18	\$ 0.43	\$ 0.08	\$ 0.13	\$ 0.25	\$ 1.63	\$ 2.10
SHARES OUTSTANDING										
Basic	2,918,682	2,891,520	2,880,704	2,873,796	2,891,176	2,860,920	2,858,890	2,818,939	2,818,928	2,839,419
Diluted	2,967,447	2,949,810	2,990,922	2,965,618	2,968,449	2,982,402	3,006,300	2,998,189	3,004,793	2,997,921
GEOGRAPHIC REVENUES										
REVENUES										
Americas	\$ 1,003,126	\$ 1,121,560	\$ 1,165,155	\$ 1,763,328	\$ 5,053,169	\$ 1,124,250	\$ 1,261,876	\$ 1,450,092	\$ 2,077,212	\$ 5,913,430
Europe/Middle East/Africa	564,773	709,519	693,675	887,268	2,855,235	617,735	755,714	707,361	902,338	2,983,148
Asia Pacific	181,211	224,865	220,090	292,682	918,848	242,532	304,293	291,965	394,760	1,233,550
Total Revenues	\$ 1,749,110	\$ 2,055,944	\$ 2,078,920	\$ 2,943,278	\$ 8,827,252	\$ 1,984,517	\$ 2,321,883	\$ 2,449,418	\$ 3,374,310	\$ 10,130,128
HEADCOUNT										
FUNCTIONAL AREA										
Sales and services	29,114	31,076	32,629	33,056		31,701	31,419	30,525	29,564	
Marketing	812	842	961	994		1,297	1,065	1,071	1,145	
Research and development	5,024	5,180	5,396	5,781		6,070	6,281	6,455	6,650	
General and administrative	3,679	3,697	3,797	3,969		4,025	3,917	3,866	3,961	
Total Company	38,629	40,795	42,783	43,800		43,093	42,682	41,917	41,320	
GEOGRAPHIC AREA										
International	19,128	20,177	20,901	21,670		21,793	21,983	21,668	21,549	
Domestic	19,501	20,618	21,882	22,130		21,300	20,699	20,249	19,771	
Total Company	38,629	40,795	42,783	43,800		43,093	42,682	41,917	41,320	

(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) Net investment gains related to marketable securities in the quarter ended May 31, 2000 of \$6,521,496 relate to the gain on sale of existing shares in Oracle Japan in connection with its Secondary Public Offering, gains on sales of other marketable securities, and the Company's equity share in the results of non-consolidated subsidiaries. Excluding the effect of these transactions, the effective income tax rate and provision for income taxes would have been 35.6% and \$510,984, respectively, and net income and fully diluted earnings per share would have been \$925,899 and \$0.31, respectively.

Net investment gains related to marketable securities in the fiscal year ended May 31, 2000 of \$6,936,955 relate to the gain on sale of existing shares in Liberate Technologies and Oracle Japan in connection with Secondary Public Offerings, gains on sales of other marketable securities, and the Company's equity share in the results of non-consolidated subsidiaries. Excluding the effect of these transactions, the effective income tax rate and provision for income taxes would have been 35.5% and \$1,131,199, respectively, and net income and fully diluted earnings per share would have been \$2,055,280 and \$0.69, respectively.

ORACLE CORPORATION
Q4 FISCAL 2000 RESULTS
SUPPLEMENTAL REVENUE ANALYSES
(unaudited, \$ in thousands)

	Fiscal 1999					Fiscal 2000				
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total
APPLICATIONS BUSINESS										
REVENUES										
License	\$ 98,090	\$ 128,451	\$ 147,351	\$ 277,150	\$ 651,042	\$ 109,143	\$ 167,818	\$ 198,830	\$ 447,413	\$ 923,204
Applications Related Services (1)	396,515	449,560	439,647	488,832	1,774,554	438,850	459,976	397,538	472,672	1,769,036
Total Revenues	\$ 494,605	\$ 578,011	\$ 586,998	\$ 765,982	\$ 2,425,596	\$ 547,993	\$ 627,794	\$ 596,368	\$ 920,085	\$ 2,692,240
AS REPORTED REVENUE GROWTH RATES										
License	0%	19%	5%	28%	16%	11%	31%	35%	61%	42%
Applications Related Services	58%	40%	44%	22%	39%	11%	2%	(10%)	(3%)	0%
Total As Reported Revenue Growth	42%	35%	32%	24%	32%	11%	9%	2%	20%	11%
DATABASE BUSINESS										
REVENUES										
License	\$ 459,523	\$ 616,796	\$ 657,256	\$ 1,206,251	\$ 2,939,826	\$ 493,503	\$ 709,353	\$ 844,376	\$ 1,344,593	\$ 3,391,825
Server and Tools Related Services (1)	794,982	861,137	834,665	971,045	3,461,829	943,021	984,736	1,008,674	1,109,632	4,046,063
Total Database Revenues	\$ 1,254,505	\$ 1,477,933	\$ 1,491,921	\$ 2,177,296	\$ 6,401,655	\$ 1,436,524	\$ 1,694,089	\$ 1,853,050	\$ 2,454,225	\$ 7,437,888
AS REPORTED REVENUE GROWTH RATES										
License	13%	20%	7%	21%	16%	7%	15%	28%	11%	15%
Server and Tools Related Services	30%	28%	21%	21%	25%	19%	14%	21%	14%	17%
Total As Reported Revenue Growth	23%	25%	15%	21%	21%	15%	15%	24%	13%	16%
TOTAL PRODUCT REVENUE										
REVENUES										
License	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868	\$ 602,646	\$ 877,171	\$ 1,043,206	\$ 1,792,006	\$ 4,315,029
Support	524,856	566,440	583,596	670,632	2,345,524	667,415	720,342	754,413	836,703	2,978,873
Total Product Revenues (2)	1,082,469	1,311,687	1,388,203	2,154,033	5,936,392	1,270,061	1,597,513	1,797,619	2,628,709	7,293,902
Consulting & Education	641,790	722,076	669,585	759,911	2,793,362	684,921	698,909	623,632	696,998	2,704,460
Other (3)	24,851	22,181	21,132	29,334	97,498	29,535	25,461	28,167	48,603	131,766
Total Revenues	\$ 1,749,110	\$ 2,055,944	\$ 2,078,920	\$ 2,943,278	\$ 8,827,252	\$ 1,984,517	\$ 2,321,883	\$ 2,449,418	\$ 3,374,310	\$ 10,130,128
AS REPORTED REVENUE GROWTH RATES										
License	10%	20%	7%	23%	16%	8%	18%	30%	21%	20%
Support	30%	32%	30%	31%	31%	27%	27%	29%	25%	27%
Total As Reported Product Revenue Growth	19%	25%	16%	25%	22%	17%	22%	29%	22%	23%
Consulting & Education	48%	34%	27%	16%	30%	7%	(3%)	(7%)	(8%)	(3%)
Total As Reported Revenue Growth	28%	27%	19%	22%	24%	13%	13%	18%	15%	15%
LOCAL CURRENCY GROWTH RATES										
License	16%	21%	7%	24%	18%	7%	19%	32%	23%	22%
Support	34%	34%	30%	33%	33%	28%	30%	32%	28%	30%
Total Local Currency Product Revenue Growth	24%	26%	16%	27%	23%	17%	24%	32%	24%	25%
Consulting & Education	52%	34%	27%	18%	31%	8%	0%	(4%)	(6%)	(1%)
Total Local Currency Growth	33%	28%	19%	24%	25%	14%	15%	20%	17%	17%

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

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

ORACLE CORPORATION
Q4 FISCAL 2000 RESULTS
SUPPLEMENTAL GEOGRAPHIC LICENSE REVENUE ANALYSIS
(unaudited, \$ in thousands)

	Fiscal 1999					Fiscal 2000				
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total
<u>AMERICAS</u>										
LICENSE REVENUES										
Servers	\$ 188,203	\$ 258,311	\$ 295,573	\$ 643,386	\$ 1,385,473	\$ 198,011	\$ 293,083	\$ 438,379	\$ 722,759	\$ 1,652,232
Tools	22,803	28,034	30,620	69,184	150,641	24,649	27,365	35,340	75,062	162,416
Applications:										
Enterprise Resource Planning	62,781	80,190	91,697	167,724	402,392	52,793	73,356	105,179	251,143	482,471
Customer Resource Management	7,229	10,402	8,550	33,655	59,836	24,189	39,260	41,469	93,895	198,813
Total Applications	\$ 70,010	\$ 90,592	\$ 100,247	\$ 201,379	\$ 462,228	\$ 76,982	\$ 112,616	\$ 146,648	\$ 345,038	\$ 681,284
Total License Revenues	\$ 281,016	\$ 376,937	\$ 426,440	\$ 913,949	\$ 1,998,342	\$ 299,642	\$ 433,064	\$ 620,367	\$ 1,142,859	\$ 2,495,932
AS REPORTED REVENUE GROWTH RATES										
Servers	23%	24%	11%	23%	21%	5%	13%	48%	12%	19%
Tools	8%	(20%)	(26%)	(9%)	(13%)	8%	(2%)	15%	8%	8%
Applications:										
Enterprise Resource Planning	2%	23%	(12%)	13%	6%	(16%)	(9%)	15%	50%	20%
Customer Resource Management	109%	164%	103%	163%	145%	235%	277%	385%	179%	232%
Total Applications	7%	31%	(7%)	25%	15%	10%	24%	46%	71%	47%
Total As Reported Growth	18%	21%	2%	21%	16%	7%	15%	45%	25%	25%
LOCAL CURRENCY GROWTH RATES										
Servers	25%	26%	13%	25%	23%	7%	15%	49%	13%	20%
Tools	9%	(19%)	(24%)	(7%)	(12%)	11%	0%	16%	9%	9%
Applications:										
Enterprise Resource Planning	2%	23%	(11%)	14%	7%	(15%)	(8%)	15%	50%	20%
Customer Resource Management	109%	166%	108%	164%	147%	237%	279%	384%	180%	233%
Total Applications	8%	31%	(7%)	25%	15%	11%	25%	46%	72%	48%
Total Local Currency Growth	19%	22%	4%	22%	17%	8%	17%	46%	25%	26%
<u>Europe/Middle East/Africa</u>										
LICENSE REVENUES										
Servers	\$ 145,184	\$ 193,475	\$ 193,102	\$ 317,654	\$ 849,415	\$ 146,884	\$ 223,724	\$ 208,046	\$ 322,466	\$ 901,120
Tools	19,559	24,430	28,019	32,786	104,794	17,232	20,910	20,596	27,238	85,976
Applications:										
Enterprise Resource Planning	19,162	28,340	31,383	51,599	130,484	17,002	31,097	33,806	58,881	140,786
Customer Resource Management	1,808	1,313	8,790	8,643	20,554	4,991	8,146	6,554	15,915	35,606
Total Applications	\$ 20,970	\$ 29,653	\$ 40,173	\$ 60,242	\$ 151,038	\$ 21,993	\$ 39,243	\$ 40,360	\$ 74,796	\$ 176,392
Total License Revenues	\$ 185,713	\$ 247,558	\$ 261,294	\$ 410,682	\$ 1,105,247	\$ 186,109	\$ 283,877	\$ 269,002	\$ 424,500	\$ 1,163,488
AS REPORTED REVENUE GROWTH RATES										
Servers	30%	41%	(1%)	20%	20%	1%	16%	8%	2%	6%
Tools	(17%)	(1%)	12%	(6%)	(3%)	(12%)	(14%)	(26%)	(17%)	(18%)
Applications:										
Enterprise Resource Planning	21%	5%	15%	17%	14%	(11%)	10%	8%	14%	8%
Customer Resource Management	127%	(77%)	(534%)	128%	150%	176%	520%	(25%)	84%	73%
Total Applications	27%	(9%)	59%	26%	23%	5%	32%	0%	24%	17%
Total As Reported Growth	22%	27%	7%	18%	18%	0%	15%	3%	3%	5%
LOCAL CURRENCY GROWTH RATES										
Servers	32%	39%	(1%)	25%	21%	4%	26%	18%	11%	15%
Tools	(16%)	(2%)	12%	(2%)	(2%)	(9%)	(8%)	(20%)	(9%)	(12%)
Applications:										
Enterprise Resource Planning	22%	5%	15%	22%	16%	(9%)	17%	16%	22%	15%
Customer Resource Management	132%	(77%)	(550%)	134%	157%	184%	569%	(22%)	100%	83%
Total Applications	27%	(10%)	57%	31%	25%	8%	41%	7%	33%	24%
Total Local Currency Growth	24%	25%	6%	23%	19%	3%	24%	12%	13%	14%

ORACLE CORPORATION
Q4 FISCAL 2000 RESULTS
SUPPLEMENTAL GEOGRAPHIC LICENSE REVENUE ANALYSIS
(unaudited, \$ in thousands)

	Fiscal 1999					Fiscal 2000				
	Q1	Q2	Q3	Q4	Total	Q1	Q2	Q3	Q4	Total
ASIA PACIFIC										
LICENSE REVENUES										
Servers	\$ 76,225	\$ 103,484	\$ 101,215	\$ 130,971	\$ 411,895	\$ 98,360	\$ 133,863	\$ 131,620	\$ 183,102	\$ 546,945
Tools	7,549	9,062	8,727	12,270	37,608	8,367	10,408	10,395	13,966	43,136
Applications:										
Enterprise Resource Planning	6,947	7,750	6,656	14,693	36,046	8,263	14,630	10,770	24,874	58,537
Customer Resource Management	163	456	275	836	1,730	1,905	1,329	1,052	2,705	6,991
Total Applications	\$ 7,110	\$ 8,206	\$ 6,931	\$ 15,529	\$ 37,776	\$ 10,168	\$ 15,959	\$ 11,822	\$ 27,579	\$ 65,528
Total License Revenues	\$ 90,884	\$ 120,752	\$ 116,873	\$ 158,770	\$ 487,279	\$ 116,895	\$ 160,230	\$ 153,837	\$ 224,647	\$ 655,609
AS REPORTED REVENUE GROWTH RATES										
Servers	(11%)	7%	34%	50%	19%	29%	29%	30%	40%	33%
Tools	(39%)	(19%)	(16%)	28%	(13%)	11%	15%	19%	14%	15%
Applications:										
Enterprise Resource Planning	(58%)	29%	4%	114%	1%	19%	89%	62%	69%	62%
Customer Resource Management	(34%)	34%	238%	233%	88%	1069%	191%	283%	224%	304%
Total Applications	(57%)	29%	7%	119%	3%	43%	94%	71%	78%	73%
Total As Reported Growth	(21%)	5%	27%	53%	15%	29%	33%	32%	41%	35%
LOCAL CURRENCY GROWTH RATES										
Servers	11%	11%	26%	39%	22%	10%	15%	22%	31%	21%
Tools	(22%)	(12%)	(20%)	22%	(8%)	(1%)	6%	14%	9%	7%
Applications:										
Enterprise Resource Planning	(46%)	34%	2%	103%	9%	9%	72%	54%	64%	53%
Customer Resource Management	(17%)	42%	227%	240%	102%	966%	184%	274%	227%	297%
Total Applications	(47%)	34%	6%	111%	11%	30%	78%	63%	73%	64%
Total Local Currency Growth	(1%)	10%	20%	42%	18%	11%	18%	24%	33%	23%
TOTAL COMPANY										
LICENSE REVENUES										
Servers	\$ 409,612	\$ 555,270	\$ 589,890	\$ 1,092,011	\$ 2,646,783	\$ 443,255	\$ 650,670	\$ 778,045	\$ 1,228,327	\$ 3,100,297
Tools	49,911	61,526	67,366	114,240	293,043	50,248	58,683	66,331	116,266	291,528
Applications:										
Enterprise Resource Planning	88,890	116,280	129,736	234,016	568,922	78,058	119,083	149,755	334,898	681,794
Customer Resource Management	9,200	12,171	17,615	43,134	82,120	31,085	48,735	49,075	112,515	241,410
Total Applications	98,090	128,451	147,351	277,150	651,042	109,143	167,818	198,830	447,413	923,204
Total License Revenues	\$ 557,613	\$ 745,247	\$ 804,607	\$ 1,483,401	\$ 3,590,868	\$ 602,646	\$ 877,171	\$ 1,043,206	\$ 1,792,006	\$ 4,315,029
AS REPORTED REVENUE GROWTH RATES										
Servers	17%	26%	10%	25%	20%	8%	17%	32%	12%	17%
Tools	(12%)	(13%)	(12%)	(5%)	(10%)	1%	(5%)	(2%)	2%	(1%)
Applications:										
Enterprise Resource Planning	(5%)	18%	(6%)	18%	8%	(12%)	2%	15%	43%	20%
Customer Resource Management	104%	23%	674%	156%	145%	238%	300%	179%	161%	194%
Total Applications	(0%)	19%	5%	28%	16%	11%	31%	35%	61%	42%
Total License Revenues	10%	20%	7%	23%	16%	8%	18%	30%	21%	20%
LOCAL CURRENCY GROWTH RATES										
Servers	24%	27%	10%	27%	22%	7%	19%	34%	14%	19%
Tools	(8%)	(12%)	(12%)	(3%)	(8%)	1%	(2%)	1%	4%	2%
Applications:										
Enterprise Resource Planning	(2%)	19%	(5%)	19%	9%	(12%)	3%	17%	45%	21%
Customer Resource Management	107%	25%	666%	159%	148%	241%	305%	181%	165%	197%
Total Applications	3%	19%	6%	29%	17%	12%	32%	37%	63%	43%
Total License Revenues	16%	21%	7%	24%	18%	7%	19%	32%	23%	22%