

TIMELINESS 3 Lower \$070
SAFETY 1 Raised \$066
TECHNICAL 3 Raised \$070
BETA .80 (1.00 - Market)



2013-15 PROJECTIONS

| | Price | Gain | Ann'l Total Return |
|------|-------|--------|--------------------|
| High | 55 | (+90%) | 19% |
| Low | 45 | (+55%) | 7.5% |

Insider Decisions

| | J | J | A | S | O | N | D | J | F |
|---------|---|---|---|---|---|---|---|---|---|
| In Buy | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Options | 0 | 0 | 0 | 0 | 1 | 3 | 2 | 0 | 0 |
| In Sell | 1 | 1 | 2 | 4 | 5 | 0 | 3 | 0 | 1 |

Institutional Decisions

| | 3/2008 | 3/2009 | 4/2009 |
|---------|--------|--------|--------|
| In Buy | 854 | 703 | 642 |
| In Sell | 740 | 983 | 954 |
| Net | 114 | -280 | -312 |

Percent shares traded: 21, 14, 7

% TOT RETURN 4/70

| | 1 yr | 3 yr | 5 yr |
|------|------|------|-------|
| MSFT | 13.9 | 63.0 | 111.0 |
| IND | 7.9 | 9.5 | 27.4 |

| 1994 | 1995 | 1996 | 1997 | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2011 | VALUE LINE P/B, INC. | 13-15 |
|---------|---------|---------|---------|---------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|-------|-------|-----------------------------------|-------|
| .50 | .63 | .92 | 1.18 | 1.47 | 1.93 | 2.25 | 2.39 | 2.65 | 3.00 | 3.39 | 3.72 | 4.40 | 5.45 | 6.60 | 6.56 | 7.10 | 7.85 | Sales per sh ^A | 18.15 |
| .10 | .18 | .28 | .41 | .59 | .84 | .99 | 1.09 | 1.07 | 1.12 | 1.15 | 1.27 | 1.34 | 1.65 | 2.16 | 1.92 | 2.40 | 2.70 | "Cash Flow" per sh | 3.40 |
| .12 | .15 | .21 | .33 | .45 | .70 | .85 | .90 | .94 | .97 | 1.04 | 1.16 | 1.20 | 1.42 | 1.87 | 1.62 | 2.05 | 2.30 | Earnings per sh ^B | 3.60 |
| .. | .. | .. | .. | .. | .. | .. | .. | .. | .08 | .16 | .32 | .34 | .40 | .44 | .52 | .52 | .56 | Div'ds Decl'd per sh ^C | .70 |
| .03 | .05 | .05 | .05 | .07 | .09 | .09 | .10 | .07 | .08 | .10 | .09 | .14 | .24 | .35 | .35 | .25 | .25 | Cap'l Spending per sh | .25 |
| .48 | .57 | .73 | 1.02 | 1.58 | 2.69 | 4.06 | 4.48 | 4.87 | 5.69 | 6.89 | 8.49 | 9.99 | 13.32 | 19.97 | 4.44 | 5.25 | 6.55 | Book Value per sh ^D | 10.70 |
| \$296.0 | \$408.0 | \$408.0 | \$632.0 | \$880.0 | \$2218 | \$2218 | \$2688 | \$2718 | \$2718 | \$3862 | \$2710 | \$2682 | \$3860 | \$1010 | \$508.0 | \$760 | \$590 | Common Shs Outing ^E | 7900 |
| 21.4 | 28.2 | 29.1 | 33.0 | 42.8 | 49.8 | 53.1 | 35.3 | 32.4 | 26.1 | 25.8 | 22.9 | 21.7 | 19.9 | 16.3 | 13.4 | 10.4 | 10.4 | Avg Ann'l P/E Ratio | 16.8 |
| 1.40 | 1.89 | 1.82 | 1.90 | 2.23 | 2.84 | 3.45 | 1.81 | 1.77 | 1.49 | 1.36 | 1.22 | 1.17 | 1.06 | .98 | .88 | .88 | .88 | Relative P/E Ratio | 1.05 |
| .. | .. | .. | .. | .. | .. | .. | .. | .. | 2% | 6% | 1.2% | 1.2% | 1.4% | 1.4% | 2.4% | 2.4% | 2.4% | Avg Ann'l Div'd Yield | 1.7% |

CAPITAL STRUCTURE as of 3/31/10
 Total Debt \$5995 mill. Due in 5 Yrs \$4349 mill.
 LT Debt \$3746 mill. LT Interest \$140 mill.
 (7% of Cap'l)
 Leases, Uncapitalized \$457.0 mill. (6/30/2009)
 No defined benefit pension plan.

Pfd Stock None

Common Stock 8,763,839,329 shs.
 as of 4/19/10

MARKET CAP: \$253 billion (Large Cap)

| | | | | | | | | | | | | | | | | | | | |
|--------|--------|--------|--------|--------|-------|-------|--------|--------|--------|-------|-------|-------|-------|-------|-------|-------|-------|-----------------------------------|-------|
| 20958 | 25298 | 28965 | 32187 | 36835 | 39768 | 44982 | 51102 | 60420 | 58437 | 61758 | 68700 | 80800 | 81758 | 80700 | 80800 | 81758 | 80700 | Sales (\$mill) ^A | 80800 |
| 51.3% | 52.4% | 45.8% | 48.0% | 40.8% | 44.0% | 39.2% | 39.1% | 40.6% | 39.2% | 42.0% | 42.0% | 42.0% | 42.0% | 42.0% | 42.0% | 42.0% | 42.0% | Operating Margin | 42.0% |
| 748.0 | 1536.0 | 1084.0 | 1439.0 | 1186.0 | 855.0 | 903.0 | 1440.0 | 2056.0 | 2502.0 | 2650 | 2700 | 2650 | 2700 | 2650 | 2700 | 2650 | 2700 | Depreciation (\$mill) | 2600 |
| 9421.0 | 10003 | 10384 | 10526 | 11530 | 12715 | 12599 | 14065 | 17681 | 14509 | 18275 | 20335 | 24000 | 24000 | 24000 | 24000 | 24000 | 24000 | Net Profit (\$mill) | 24000 |
| 34.0% | 33.3% | 32.0% | 32.2% | 33.1% | 32.0% | 31.0% | 30.0% | 25.8% | 26.5% | 25.0% | 25.0% | 25.0% | 25.0% | 25.0% | 25.0% | 25.0% | 25.0% | Income Tax Rate | 25.0% |
| 41.0% | 39.5% | 38.6% | 32.7% | 30.8% | 32.0% | 28.5% | 27.5% | 29.2% | 24.9% | 29.6% | 30.5% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | 30.0% | Net Profit Margin | 30.0% |
| 20563 | 28525 | 35832 | 44999 | 53597 | 51960 | 26568 | 15414 | 13358 | 22248 | 29000 | 35000 | 37500 | 37500 | 37500 | 37500 | 37500 | 37500 | Working Cap'l (\$mill) | 40000 |
| .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | .. | Long-Term Debt (\$mill) | 3750 |
| 43268 | 47289 | 52180 | 61620 | 74825 | 48115 | 40154 | 31097 | 36288 | 30658 | 46750 | 52750 | 52750 | 52750 | 52750 | 52750 | 52750 | 52750 | Shs. Equity (\$mill) ^D | 84500 |
| 22.8% | 21.2% | 19.9% | 17.3% | 15.1% | 26.4% | 31.4% | 45.2% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | Return on Total Cap'l | 27.5% |
| 22.8% | 21.2% | 19.9% | 17.3% | 15.1% | 26.4% | 31.4% | 45.2% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | 48.7% | Return on Shs. Equity | 28.5% |
| 22.7% | 21.2% | 19.9% | 15.8% | 12.8% | 19.2% | 22.6% | 30.0% | 37.7% | 25.5% | 29.5% | 28.8% | 28.8% | 28.8% | 28.8% | 28.8% | 28.8% | 28.8% | Retained to Com Eq | 22.8% |
| .. | .. | .. | 8% | 15% | 27% | 38% | 27% | 23% | 23% | 23% | 23% | 23% | 23% | 23% | 23% | 23% | 23% | All Div'ds to Net Prof | 2.0% |

CURRENT POSITION

| | 2008 | 2009 | 3/31/10 |
|----------------------|-------|-------|---------|
| Cash Assets | 23662 | 31447 | 36668 |
| Receivables | 13589 | 11192 | 9137 |
| Inventory (Avg Cost) | 995 | 217 | 501 |
| Other | 5008 | 5824 | 4514 |
| Current Assets | 43262 | 49280 | 54518 |
| Accts Payable | 4034 | 3324 | 3279 |
| Debt Due | .. | 3006 | 3527 |
| Unearned Revenue | 13397 | 13003 | 11171 |
| Other | 15405 | 8707 | 9025 |
| Current Liab. | 29836 | 27734 | 26252 |

BUSINESS: Microsoft Corp. is the largest independent maker of software. It develops and sells software products for a wide range of computing devices. Also sells the Xbox video game console. Revenue sources in fiscal 2009: Microsoft Business, 32.4% of total; Windows & Windows Live, 25.5%; Server and Tools, 24.2%; Entertainment & Devices, 13.8%; Online Services, 3.7%; Other, 3%. Research and development: 15.4% of 2009 sales. Employed 93,000 at 6/30/09. William H. Gates owns 8.0% of stock, other officers & directors 4.8% (9/09 proxy). Chairman: William H. Gates. CEO: Steven A. Ballmer. Incorporated: Washington. Address: One Microsoft Way, Redmond, Washington 98052-6399. Telephone: 425-882-8080. Internet: www.microsoft.com.

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Yan Bai



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