

**TIMELINESS** 3 Lower 5070  
**SAFETY** 1 Raised 5066  
**TECHNICAL** 3 Raised 5070  
**BETA** .80 (1.00 - Market)



**2013-15 PROJECTIONS**  
 Price Gain Return  
 High 55 (+80%) 19%  
 Low 45 (-40%) 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 | 6 | 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 4/10**

|              | 1 yr | 3 yr | 5 yr |
|--------------|------|------|------|
| MSFT         | 53.9 | 53.0 | 57.4 |
| IND. AVERAGE | 7.9  | 9.5  | 17.4 |

| 1994    | 1995    | 1996    | 1997    | 1998    | 1999  | 2000  | 2001  | 2002  | 2003  | 2004  | 2005  | 2006  | 2007    | 2008    | 2009   | 2010 | 2011 | VALUE LINE PUB. 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 <sup>A</sup>         | 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 <sup>B</sup>      | 3.60  |
| ..      | ..      | ..      | ..      | ..      | ..    | ..    | ..    | ..    | .08   | .16   | .32   | .34   | .40     | .44     | .52    | .52  | .56  | Div'ds Decl'd per sh <sup>C</sup> | .70   |
| .03     | .05     | .05     | .05     | .07     | .09   | .09   | .10   | .07   | .08   | .10   | .09   | .10   | .14     | .15     | .15    | .15  | .15  | 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 <sup>D</sup>    | 10.70 |
| \$296.0 | \$408.0 | \$408.0 | \$632.0 | \$880.0 | \$218 | \$218 | \$288 | \$278 | \$278 | \$382 | \$270 | \$282 | \$380.0 | \$101.0 | \$50.0 | \$50 | \$50 | Common Shs Outing <sup>E</sup>    | 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 | 44282 | 51122  | 60420  | 58437  | 61758 | 68700 | 80800 | 80800 | 80800 | 80800 | 80800 | 80800 | Sales (\$mill) <sup>A</sup>       | 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%  | 25.0%  | 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%  | 39.3%  | 36.6%  | 32.7%  | 30.8%  | 32.0% | 28.5% | 27.5%  | 29.2%  | 24.9%  | 29.6% | 30.5% | 30.5% | 30.5% | 30.5% | 30.5% | 30.5% | 30.5% | Net Profit Margin                 | 30.5% |
| 20563  | 28525  | 35832  | 44999  | 53597  | 51960 | 26568 | 16414  | 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  | 39558  | 46750 | 52750 | 52750 | 52750 | 52750 | 52750 | 52750 | 52750 | Shs. Equity (\$mill) <sup>D</sup> | 84500 |
| 22.8%  | 21.2%  | 19.9%  | 17.3%  | 15.1%  | 26.4% | 31.4% | 45.2%  | 48.7%  | 48.7%  | 36.6% | 36.5% | 34.5% | 34.5% | 34.5% | 34.5% | 34.5% | 34.5% | 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%  | 36.6% | 36.5% | 34.5% | 34.5% | 34.5% | 34.5% | 34.5% | 34.5% | Return on Shs. Equity             | 28.5% |
| 22.7%  | 21.2%  | 19.9%  | 15.8%  | 12.8%  | 19.2% | 22.6% | 33.0%  | 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%    | 31%    | 25%   | 24%   | 24%   | 24%   | 24%   | 24%   | 24%   | 24%   | All Div'ds to Net Profit          | 23%   |

**CURRENT POSITION**

| (MILL.)              | 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       | 43242 | 43580 | 46819   |
| Accts Payable        | 4034  | 3324  | 3279    |
| Debt Due             | ..    | 5008  | 3527    |
| Unearned Revenue     | 13397 | 13003 | 11171   |
| Other                | 15405 | 8707  | 9025    |
| Current Liab.        | 26836 | 27034 | 26426   |

**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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# Value Line Report For Stocks

**Liyong Dong**



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