

Stock Valuation Report for Oracle Corporation (ORCL)

Report Generated on August 03, 2026

This report provides an AI-supported analysis of the selected security, combining fundamental, technical, and qualitative insights to help you better understand its potential risks and rewards.

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Report Data Summary	
Report Data Field	Value
Exchange	NYQ
Reporting Currency	USD
Market Timezone	America/New_York
Market Data As Of	2026-08-03 17:06:12

Choose how much detail you want to read

QUICK REPORT
Five concise pages in plain language

FULL DETAILED REPORT
Complete analysis, sources, charts, and disclosures

Both views are included in this single PDF. Use the tab-like links in the footer to move between them at any time.

Quick Report 1 of 5 - Investment Snapshot

A plain-language overview of the current price, estimated value, model view, and one-year base scenario.

Current share price \$139.17 The market price used for all comparisons in this report.	Cash-flow value estimate \$21.98 A long-term value estimate based on future cash flow; confidence: High.	Earnings value estimate \$194.92 An estimate based on earnings and a supported peer valuation multiple.
Overall outlook Moderately Bearish Combines business results, estimated value, price trends, opportunities, and risks.	Do the major sections agree? Mixed Aligned means the main sections generally support the same overall conclusion.	Confidence in the estimates Medium This describes the quality of the inputs and methods, not certainty about the future.

What this means

The overall outlook is moderately bearish. Agreement across the major sections is described as mixed. The cash-flow value estimate is about 84.00% below the current share price used in this report. Confidence in the valuation estimates is medium; this is not a guarantee of future performance.

One-year scenario ranges

Bear range: \$30.71 to \$70.36; base range: \$70.36 to \$149.64; bull range: \$149.64 to \$189.29.

Confidence: Very Low. The exact center estimate of \$110.00 is a secondary reference inside the wider risk range, not a promised price.

Estimated values and price scenarios are analytical tools, not promises. A stock can remain above or below estimated value for a long time.

Quick Report 2 of 5 - What Could Help or Hurt the Stock

The three strongest supported positives, the three most important risks, and the developments that could change the view.

Why the stock could do better

- Continued cloud infrastructure expansion could lift revenue and improve utilization and scale economics over the near term, supporting earnings and sentiment.
- Migration of installed database and application customers to cloud subscriptions could increase recurring revenue and improve cash flow visibility over the medium term.
- Cross-selling integrated cloud, database, and application offerings could raise contract value and support margins over the next several quarters.

What could go wrong

- Heavy competition in cloud infrastructure and enterprise software could pressure pricing and limit share gains, which would reduce revenue growth and valuation upside.
- Large capital spending for data centers and cloud capacity could keep free cash flow under pressure, especially if utilization ramps slowly.
- Customer concentration and long sales cycles could make results sensitive to renewal timing, deal delays, and budget shifts.

What would change the view

- A sustained improvement in free cash flow to positive territory, with operating cash flow staying above 30.00 billion USD annually, would materially raise the estimates.
- A confirmed breakout above the longer-term resistance zone, accompanied by stronger RSI and MACD momentum, would justify higher near-term price targets.
- A material increase in revenue growth, margin expansion, or analyst targets would raise the 180-day and 365-day estimates, while weaker growth or lower guidance would lower them.

Beginner note: catalysts are events or trends that may help the business or share price. Risks are conditions that may weaken results or investor confidence.

Quick Report 3 of 5 - Financial Health and Valuation

A compact view of business health, estimated value, and the current analyst consensus when available.

Measure	Report value	Plain-English meaning
Revenue (TTM)	\$67.36 billion	Total sales over the latest twelve months.
Net income (TTM)	\$17.09 billion	Profit remaining after expenses and taxes.
Free cash flow (TTM)	\$-23.69 billion	Cash available after normal operations and capital spending.
Debt-to-equity	3.67x	Higher values generally mean more financial leverage.
Profit margin	25.37%	How much profit the company keeps from each dollar of sales.
Revenue growth	11.60%	Whether sales are expanding or shrinking on the validated period basis.
Dividend yield	1.44%	Estimated annual cash dividend relative to the current share price.

How valuation looks

The stock's trailing P/E is 23.87x.

That is 28.60% below the selected-peer median of 33.43x. A lower multiple can indicate opportunity, but it may also reflect company-specific risk.

The DCF estimate is 84.20% below the current price. The detailed DCF section shows the forecast, discount rate, sensitivity table, and mathematical checks.

Analyst measure	Current consensus	How to read it
Mean price target	\$248.15 (78.30%)	Published target range: \$110.00 to \$400.00. Targets are opinions, not promises.
Rating mix	8 strong buy, 29 buy, 6 hold, 1 sell	This is the provider's analyst mix, not this report's recommendation.
Next-year growth estimates	EPS 35.26%, revenue 46.07%	Shows the current consensus direction for earnings and sales.
Next earnings date	2026-09-09	A major date when estimates and price expectations may change.

Quick Report 4 of 5 - Market Signals and Recent Developments

A beginner-friendly view of price momentum, important price levels, material news, disclosed trading activity, and call/put option quality.

Market signal	Reading	How to interpret it
Overall price signal	Mixed	Combined trend and momentum reading.
Price vs. 200-day average	Below	Above supports the long-term trend; below signals weakness.
RSI	51.56	Above 70 can be stretched; below 30 can be unusually weak.
Trend strength (ADX)	38.20	Above 25 often indicates a stronger trend; ADX does not show direction.
Trading volume vs. normal	0.69x	Above 1.00x means trading is heavier than the prior 20-day average.
Typical daily move (ATR)	\$7.94 (5.70%)	The recent average trading range; larger values mean wider normal swings.
52-week position	-59.29% from high; 21.55% from low	Shows where the share price sits within its one-year range.
6-month relative return	S&P 500 -24.16%; XLK -38.44%	Positive values mean the stock outperformed the named benchmark.
Short interest	2.91% of float; 1.39 days to cover	Higher values can signal skepticism and may increase squeeze risk.
Options-priced earnings move	+/- 19.74%	Market-priced move size around earnings; it does not predict direction.
Nearest support / resistance	\$126.25 / \$132.95	Nearby areas where buying or selling pressure may increase.

Technical-data basis: indicators were calculated deterministically in Python from Yahoo Finance price and volume data retrieved 2026-08-03.

Latest verified development: Event: [Event 4] Persistent Achieves \$452.40M Revenue in Q1 FY27 with 16.10% YoY Growth.

Disclosure or screen	Quick finding
Lawmaker disclosures	No qualifying trades found
Insider transactions	No qualifying trades found
Call option screening	No supported scenario
Put option screening	5 supported; top expires 2027-01-15; strike \$160.00

Quick Report 5 of 5 - Outlook, Confidence, and Next Steps

The modeled price path, the report's bottom line, validation status, and links into the complete supporting analysis.

Horizon	Bear range	Base range	Bull range	Confidence
Current	\$139.17 - \$139.17	\$139.17 - \$139.17 (center \$139.17)	\$139.17 - \$139.17	Observed
30 days	\$104.72 - \$118.36	\$118.36 - \$145.64 (center \$132.00)	\$145.64 - \$159.28	Medium
90 days	\$78.14 - \$99.92	\$99.92 - \$143.48 (center \$121.70)	\$143.48 - \$165.26	Low
180 days	\$58.27 - \$88.14	\$88.14 - \$147.86 (center \$118.00)	\$147.86 - \$177.73	Very Low
365 days	\$30.71 - \$70.36	\$70.36 - \$149.64 (center \$110.00)	\$149.64 - \$189.29	Very Low

Bear, base, and bull zones divide the existing 80% modeled uncertainty band. The exact center estimate remains a secondary reference, not a promised price.

Bottom line

The report's overall outlook is moderately bearish. Confidence in the valuation estimates is medium, so the results should be treated as informed estimates rather than promises. Oracle's strongest support is its below-peer and below-sector earnings valuation combined with strong profitability, which helps offset the weak DCF output and negative free cash flow.

Confidence and validation

Report-wide validation status: Passed with review items. 156 checks were performed. 3 failed or review-level item(s) require attention.

Forecast accuracy statistics remain withheld until 100 forecasts have matured. 0 have matured and 100 more are required; see the full Conclusions section for the scorecard.

[OPEN FULL DETAILED REPORT](#)

[VIEW DETAILED CONTENTS](#)

The Quick Report summarizes the same canonical data and completed report sections shown in the detailed report. It does not replace the detailed sources, assumptions, tables, or disclosures.

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Executive Summary - (ORCL) Oracle Corporation

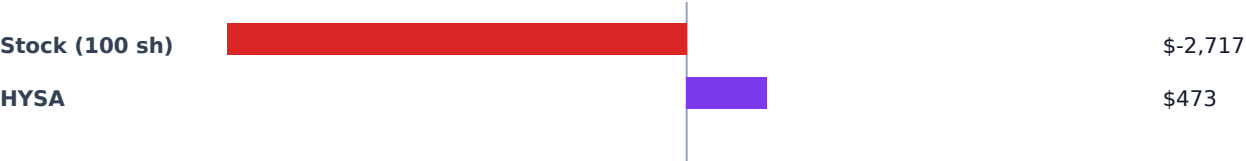
At a Glance

Current Price	Fair Value (EPS)
\$139.17	\$194.92
Fair Value (DCF)	Model View
\$21.98	Moderately Bearish
Evidence Alignment	Valuation Confidence
Mixed	Medium

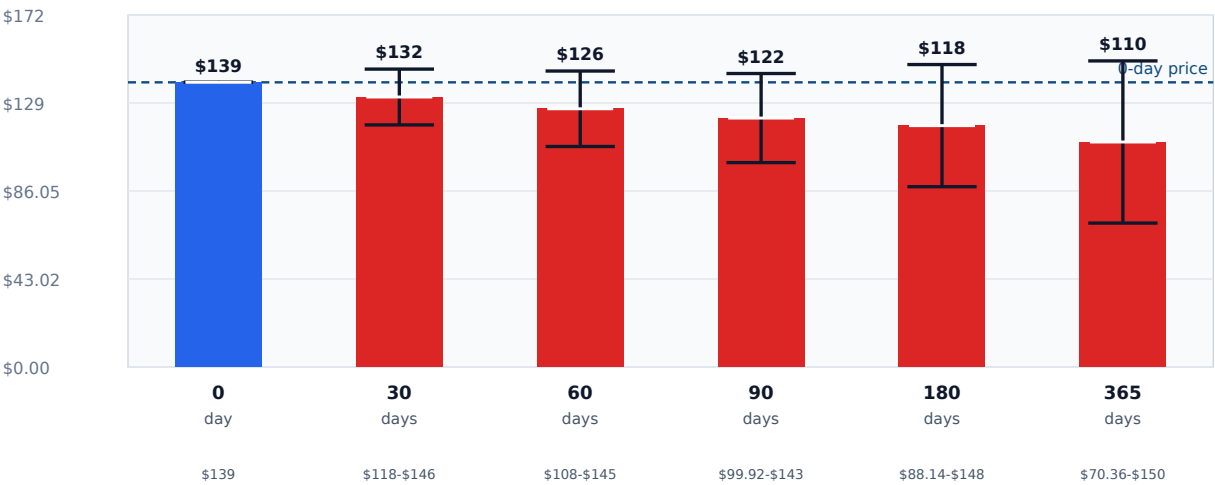
Current vs Fair Value (EPS & DCF)



One-Year Profit/Loss: Stock vs High-Yield Savings



Base-Case Price Ranges by Interval



Solid bars show each interval's center estimate. Thin whiskers show the complete base-case range. Future intervals are green when the center estimate is above the 0-day price and red when it is below; the 0-day observation is blue.

Forecast Scenario Ranges (Primary View)

Horizon	Bear range	Base range	Bull range	Confidence
Current	\$139.17 - \$139.17	\$139.17 - \$139.17 center \$139.17	\$139.17 - \$139.17	Observed
30 days	\$104.72 - \$118.36	\$118.36 - \$145.64 center \$132.00	\$145.64 - \$159.28	Medium
60 days	\$89.35 - \$107.80	\$107.80 - \$144.70 center \$126.25	\$144.70 - \$163.15	Low
90 days	\$78.14 - \$99.92	\$99.92 - \$143.48 center \$121.70	\$143.48 - \$165.26	Low
180 days	\$58.27 - \$88.14	\$88.14 - \$147.86 center \$118.00	\$147.86 - \$177.73	Very Low
365 days	\$30.71 - \$70.36	\$70.36 - \$149.64 center \$110.00	\$149.64 - \$189.29	Very Low

Bear, base, and bull zones divide the existing 80% modeled uncertainty band. The exact center estimate is retained only as a secondary reference and is not a promised price.

Investment View

Model View: Moderately Bearish; Evidence Alignment: Mixed; Valuation Confidence: Medium

Key Catalysts

- Continued cloud infrastructure expansion could lift revenue and improve utilization and scale economics over the near term, supporting earnings and sentiment.
- Migration of installed database and application customers to cloud subscriptions could increase recurring revenue and improve cash flow visibility over the medium term.
- Cross-selling integrated cloud, database, and application offerings could raise contract value and support margins over the next several quarters.

Key Risks

- Heavy competition in cloud infrastructure and enterprise software could pressure pricing and limit share gains, which would reduce revenue growth and valuation upside.
- Large capital spending for data centers and cloud capacity could keep free cash flow under pressure, especially if utilization ramps slowly.
- Customer concentration and long sales cycles could make results sensitive to renewal timing, deal delays, and budget shifts.

Stock Investment Projection (100 Shares)

Starting Investment: \$13,917.00

Projected Sale Proceeds: \$11,000.00

Projected Annual Dividend Per Share: \$2.00

Projected Dividend Income: \$200.00

Stock Investment Projection (100 Shares) (continued...)

Capital Gain or Loss: \$-2,917.00

Projected Ending Value: \$11,200.00

Total Profit: \$-2,717.00

Risk and Reward: Equity-market risk; the projected result includes sale proceeds plus the selected forward annual dividend, which may be changed or suspended.

High-Yield Savings Projection

Assumed HYSA APY: 3.40%

Rate Source: Marcus by Goldman Sachs - Online Savings Account
(MARCUS_ONLINE_SAVINGS_APY)

Source Observation Date: 2026-08-03

Retrieved: 2026-08-03

Assumption: The displayed APY is assumed to remain unchanged for one year, and interest is reinvested. Representative variable APY quoted by the named FDIC-insured online savings provider; it is not a market-wide maximum, and the rate may change before or after an account is opened.

Starting Deposit: \$13,917.00

Projected Ending Value: \$14,390.18

Total Profit: \$473.18

Risk and Reward: Lower market risk; the projection assumes the stated APY remains available for the full year and interest is reinvested.

Profit Comparison

1. The 100-share stock projection produces total profit of \$-2,717.00, which is \$3,190.18 lower than the high-yield savings projection.
2. The high-yield savings projection produces total profit of \$473.18, which is \$3,190.18 higher than the 100-share stock projection.

Call Option Screening Result

No supported call option scenario was identified.

Put Option Screening Result

Official Contract Symbol: ORCL270115P00160000

Expiration Date: 2027-01-15

Strike Price Per Share: \$160.00

Premium Used Per Share: \$37.30

Breakeven at Expiration Per Share: \$122.70

Forecast Price at Expiration Per Share: \$118.62

Modeled Profit/Loss Per Contract at Expiration: \$408.33

Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$12,270.00.

Maximum Loss Per Contract: \$3,730.00

Quality Score: 0.69

Model View

Model View: Moderately Bearish; Evidence Alignment: Mixed; Valuation Confidence: Medium

DCF implies -84.20% versus the canonical price; EPS valuation implies 40.06% versus the canonical price; 365-day modeled scenario implies -20.96% versus the canonical price. Overall DCF confidence is High. The valuation frameworks disagree directionally, so the label is moderated. The methods point in a similar direction but differ widely in magnitude, so confidence is capped. Plausibility review: Supported intrinsic-value methods differ by 8.87x in magnitude.

Why Valuation Methods Disagree

Method Value Difference vs Current What the method measures

DCF \$21.98 per share -84.20% Values long-run free cash flow after reinvestment, discounted at WACC or cost of equity; it is sensitive to capital spending, cash conversion, terminal growth, and the discount rate.

EPS multiple \$194.92 per share 40.06% Applies a supported earnings multiple to EPS; it can remain high when accounting earnings are strong even if capital intensity or near-term free cash flow is weak.

365-day modeled price \$110.00 per share -20.96% A market-price scenario blending fundamentals, technical conditions, catalysts, and risks; it is not an intrinsic-value calculation.

Reconciliation: The supported methods disagree materially because they answer different questions. The enterprise fcff DCF emphasizes future cash flow after reinvestment and discounting, the EPS method emphasizes earnings and comparable multiples, and the 365-day estimate models a possible market path. Treat the range and confidence labels as more informative than a simple average of the values.

Company Overview - (ORCL) Oracle Corporation

Overview

Oracle Corporation is a global enterprise software and cloud infrastructure company that sells database software, enterprise applications, and cloud services to businesses and governments. Its primary economic value comes from recurring software subscriptions, cloud infrastructure usage, and long-term customer relationships that support durable revenue, operating leverage, and cash generation.

Business Segments

- Oracle Cloud Infrastructure and cloud services are the company's largest growth engine, combining infrastructure capacity, platform services, and hosted software delivered on subscription and usage-based terms.
- Cloud and license support, including database and application maintenance, remains a major recurring revenue source and helps stabilize cash flow through long-duration enterprise renewals.
- Cloud license and on-premises license, plus services and hardware, provide additional revenue streams tied to software transactions, consulting, and engineered systems, although these are less central than recurring cloud and support revenue.

Competitive Position

Oracle's advantages include a large installed base, deep database expertise, sticky enterprise workloads, and broad product integration across infrastructure and applications. It faces intense competition from Microsoft, Amazon, Google, SAP, IBM, and specialist software vendors. The company's ability to win share depends on migration speed, cloud reliability, pricing, and customer trust.

Strategy and Growth Drivers

- Cloud infrastructure expansion is the main growth driver, and added capacity and new regions can increase revenue while improving utilization and scale economics.
- Migration of installed database and application customers to cloud subscriptions can lift recurring revenue, reduce mix volatility, and improve long-term cash flow visibility.
- Cross-selling integrated cloud, database, and application offerings can raise average contract value, strengthen customer retention, and support operating margin through platform consolidation.

Key Risks

- Heavy competition in cloud infrastructure and enterprise software could pressure pricing and limit share gains, which would reduce upside to revenue growth and valuation multiples.
- Large capital spending for data centers and cloud capacity can weigh on free cash flow in the near term, especially if utilization ramps more slowly than expected.
- Customer concentration within large enterprise accounts and long sales cycles can make results sensitive to renewal timing, deal delays, or customer budget shifts.

Source References: [1], [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14], [15], [16], [17]

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Executive Leadership and Board - (ORCL) Oracle Corporation

Executive Leadership

Latest available official roles were reconciled through 2026-08-03, including a current official roster. More recent official changes override older filings when identified.

Transparency note: some roles rely on the latest available dated official information from 2026-04-06 or earlier; no more recent official role information was found within the prior 30 days.

1. Name and Title: Clay Magouyrk, Chief Executive Officer. [1] [2] [3]
Length of Service: effective September 22, 2025; current as of 2026-08-03.
Relevant Experience: Oracle board page lists him as Chief Executive Officer. Oracle's April 2026 CFO announcement refers to Clay Magouyrk as CEO, confirming the role is active.
Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

2. Name and Title: Hilary Maxson, Chief Financial Officer. [1] [4] [5]
Length of Service: effective April 6, 2026; current as of 2026-08-03.
Relevant Experience: Former Executive Vice President and Group CFO at Schneider Electric. Oracle says she leads the global finance organization and reports to CEO Clay Magouyrk.
Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

3. Name and Title: Douglas Kehring, Executive Vice President and Head of Operations. [6] [5]
Relevant Experience: Oracle operations executive who continues in operations after stepping down as principal financial officer.
Current-Role Basis: latest available official evidence dated 2026-04-06, independently reconciled through 2026-08-03.

Executive Leadership (continued...)

4. Name and Title: Richard Allison, Executive Vice President, Global Practices and Risk Management. [1]

Length of Service: Current service date not stated on official page..

Relevant Experience: Leads global practices and risk management functions supporting Oracle's enterprise and cloud businesses.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

5. Name and Title: T.K. Anand, Executive Vice President, Healthcare and AI Data Platform. [1]

Length of Service: Current service date not stated on official page..

Relevant Experience: Leads healthcare and AI data platform initiatives tied to Oracle's industry cloud strategy.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

6. Name and Title: Lawrence J. Ellison, Executive Chairman and Chief Technology Officer. [1] [7] [8]

Length of Service: Oracle cofounder; longtime board and technology leader..

Relevant Experience: Oracle cofounder and technology leader focused on product strategy, database, cloud, and AI direction.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

7. Name and Title: Rob Duhart, Chief Security Officer. [1]

Length of Service: Current service date not stated on official page..

Relevant Experience: Responsible for security leadership across Oracle's products, infrastructure, and operations.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

Executive Leadership (continued...)

8. Name and Title: Safra A. Catz, Executive Vice Chair of the Board of Directors. [1] [2] [7]

Length of Service: Long-time Oracle executive; former CEO..

Relevant Experience: Former CEO with deep finance, software, and operating experience at Oracle.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

Board of Directors

Latest available official roles were reconciled through 2026-08-03, including a current official roster. More recent official changes override older filings when identified.

1. Name and Board Role: Jeffrey O. Henley, Executive Vice Chair of the Oracle Board of Directors; Lead Independent Director on an annual rotating basis when serving as a committee chair under Oracle Corporate Governance Guidelines. [7] [9]

Length of Service: current board member; Oracle governance guidelines provide annual rotating service as lead independent director for committee chairs.

Relevant Experience: Oracle's governance guidelines state the chairs of the Finance and Audit, Nominating and Governance, and Compensation Committees serve as lead independent director on an annual rotating basis.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

Board of Directors (continued...)

2. Name and Board Role: Stephen H. Rusckowski, Director; Audit Committee Chair. [10] [7] [11]

Length of Service: appointed to Oracle board effective 2025-11-18; current as of 2026-08-03.

Relevant Experience: Oracle's official investor news identifies him as a former Quest Diagnostics CEO and states he was elected to Oracle's Board. Oracle's proxy materials identify John J. Stephens as audit committee chair, but Oracle's current board page does not show committee assignments.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

3. Name and Board Role: Dr. Tomislav Mihaljevic, Chief Executive Officer and President, and Morton L. Mandel CEO Chair, of Cleveland Clinic. [7] [12]

Length of Service: Elected director effective 2026-05-06..

Relevant Experience: Healthcare executive leading Cleveland Clinic; experience in complex clinical organizations and patient care.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

4. Name and Board Role: Jeffrey S. Berg, Chairman of Northside Services, LLC and Former CEO of International Creative Management, Inc.. [7]

Length of Service: Current board service shown on Oracle board page; start date not stated..

Relevant Experience: Entertainment and talent-management executive with long leadership and board experience.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

5. Name and Board Role: Larry Ellison, Executive Chairman and Chief Technology Officer. [7] [1] [8]

Length of Service: Oracle cofounder; longtime board leader..

Relevant Experience: Oracle cofounder with long technology, product, and governance experience.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

Board of Directors (continued...)

6. Name and Board Role: Rona A. Fairhead, Former Minister of State, United Kingdom Department for International Trade and Former Chair of the British Broadcasting Corporation Trust. [7]

Relevant Experience: Senior British business and public-policy leader with governance experience.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

7. Name and Board Role: Awo Ablo, President, Programs and Strategy, Co-Impact. [7]

Length of Service: Current board service shown on Oracle board page; start date not stated..

Relevant Experience: Strategy and programs leader with social-impact sector experience.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

8. Name and Board Role: Bruce R. Chizen, Senior Adviser to Permira Advisers and Former CEO of Adobe Systems Incorporated. [7]

Length of Service: Current board service shown on Oracle board page; start date not stated..

Relevant Experience: Technology executive and investor with software and governance experience.

Current-Role Basis: current official company roster, independently reconciled through 2026-08-03.

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Newsworthy Events - (ORCL) Oracle Corporation

Decision Takeaway

Neutral. The verified catalog contains no Oracle-specific corporate action, and the closest items are broad market or peer-sector developments that may or may not transmit to Oracle through demand, financing, competition, or valuation channels. Based on the catalog alone, the near-term effect is not deterministically favorable or unfavorable.

Key News Events

1. Event: [Event 4] Persistent Achieves \$452.40M Revenue in Q1 FY27 with 16.10% YoY Growth.

Category: Industry sector.

Directional Relevance: Potentially favorable, as analytical interpretation suggests strong software-services demand could indicate supportive conditions for Oracle's infrastructure and enterprise software markets.

Expected Timeframe: Near term.

Impact Path: Analytical interpretation suggests the reported revenue growth and record TCV at a peer software-infrastructure company may signal demand strength, which could influence Oracle's competitive positioning and customer spending environment.

Confidence: Low.

Source References: [1].

2. Event: [Event 5] For the third time in history, women outnumber men in the workforce as the stay-at-home boyfriend becomes an economic trend.

Category: Market macro.

Directional Relevance: Mixed, as analytical interpretation suggests broad labor-market shifts could affect Oracle indirectly through customer spending and valuation channels.

Expected Timeframe: Near to medium term.

Impact Path: Analytical interpretation suggests the labor-market trend may affect macroeconomic conditions relevant to enterprise IT spending, financing costs, and investor risk appetite.

Confidence: Low.

Source References: [2].

Key News Events (continued...)

3. Event: [Event 6] States expand student loan options as new federal borrowing caps take effect - but they come with trade-offs.

Category: Market macro.

Directional Relevance: Neutral to slightly favorable, as analytical interpretation suggests incremental consumer-finance support could modestly sustain broader economic activity that feeds enterprise demand.

Expected Timeframe: Medium term.

Impact Path: Analytical interpretation suggests the lending changes may affect household balance sheets and broader spending conditions, with only indirect implications for Oracle.

Confidence: Low.

Source References: [3].

4. Event: [Event 7] Capricor Investor News: If You Have Suffered Losses in Capricor Therapeutics Inc., You Are Encouraged to Contact The Rosen Law Firm About Your Rights.

Category: Market macro.

Directional Relevance: Neutral, as analytical interpretation suggests securities-litigation headlines are more likely to affect risk sentiment than Oracle's operating fundamentals.

Expected Timeframe: Near term.

Impact Path: Analytical interpretation suggests litigation-related investor sentiment could influence broader small-cap and risk appetite conditions, but the company-specific link to Oracle is weak.

Confidence: Low.

Source References: [4].

5. Event: [Event 8] PODD Investors Have Opportunity to Lead Insulet Corporation Securities Fraud Lawsuit.

Category: Market macro.

Directional Relevance: Neutral, as analytical interpretation suggests the item may reflect broader equity-market litigation sensitivity without a direct Oracle operating linkage.

Expected Timeframe: Near term.

Impact Path: Analytical interpretation suggests investor-rights activity may influence market risk perception, though the effect on Oracle is indirect.

Confidence: Low.

Source References: [5].

Key News Events (continued...)

6. Event: [Event 9] FUTU FINAL DEADLINE: ROSEN, A GLOBALLY RESPECTED LAW FIRM, Encourages Futu Holdings Limited Investors to Secure Counsel Before Important Deadline in Securities Class Action - FUTU.

Category: Market macro.

Directional Relevance: Neutral, as analytical interpretation suggests this is a litigation-flow headline with only indirect implications for Oracle.

Expected Timeframe: Near term.

Impact Path: Analytical interpretation suggests the item may affect broader sentiment toward equities subject to legal scrutiny, but it does not establish a direct Oracle exposure.

Confidence: Low.

Source References: [6].

Historical Analogues

1. Current Event: Persistent Achieves \$452.40M Revenue in Q1 FY27 with 16.10% YoY Growth.

Current Event Source Reference: [1]

Comparable Event 1: Oracle Announces Fiscal 2026 Third Quarter Financial Results (2026-03-10)

Similarity: Quarterly earnings release showing materially similar revenue-growth execution, with Oracle reporting 22.00% year-over-year quarterly revenue growth and unusually strong operating performance in its cloud businesses.

Observed Stock Reaction: -1.43% after 1 trading day; 2.91% after 5 trading days; -5.54% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: 4.27% versus SPY.

Historical Source References: [7], [8]

Comparable Event 2: Oracle Announces Fiscal 2023 Fourth Quarter and Fiscal Full Year Financial Results (2023-06-12)

Similarity: Quarterly earnings event from the same company featuring strong year-over-year revenue growth (17.00%) alongside full-year results, making it a close analogue to a revenue-and-profit growth update.

Observed Stock Reaction: 5.99% after 1 trading day; 14.21% after 5 trading days; 4.95% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: 11.61% versus SPY.

Historical Source References: [9], [8]

Historical Impact Estimate: The 2 usable analogue reactions had a median 5-trading-day market-adjusted move of 7.94% and a range of 4.27% to 11.61%. At the current price of \$139.17, this corresponds to an estimated per-share effect near +\$11.05 with an observed analogue range of +\$5.95 to +\$16.15. Confidence: Low-to-Medium. This is a historical scenario estimate, not a prediction or proof of causation.

Historical Analogues (continued...)

2. Current Event: For the third time in history, women outnumber men in the workforce as the stay-at-home boyfriend becomes an economic trend.

Current Event Source Reference: [2]

Comparable Event 1: Oracle Announces Fiscal Year 2026 Third Quarter Financial Results (2026-03-10)

Similarity: Comparable company-specific macro/labor-market lens in the sense that Oracle was giving a materially important outlook update in a public earnings release; this is one of Oracle's major verified public events within the search window and is the closest high-signal analog among recent company events.

Observed Stock Reaction: -1.43% after 1 trading day; 2.91% after 5 trading days; -5.54% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: 4.27% versus SPY.

Historical Source References: [10], [8]

Comparable Event 2: Oracle Announces Fiscal Year 2026 Second Quarter Financial Results (2025-12-10)

Similarity: Another Oracle public financial-results event with company guidance and outlook commentary; it is materially similar only at the level of being a major verified Oracle event affecting expectations, not as a true labor-market analogue.

Observed Stock Reaction: 0.67% after 1 trading day; -14.84% after 5 trading days; -14.39% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: -14.23% versus SPY.

Historical Source References: [11], [8]

Historical Impact Estimate: The 2 usable analogue reactions had a median 5-trading-day market-adjusted move of -4.98% and a range of -14.23% to 4.27%. At the current price of \$139.17, this corresponds to an estimated per-share effect near -\$6.93 with an observed analogue range of -\$19.81 to +\$5.95. Confidence: Low-to-Medium. This is a historical scenario estimate, not a prediction or proof of causation.

Historical Analogues (continued...)

3. Current Event: States expand student loan options as new federal borrowing caps take effect - but they come with trade-offs.

Current Event Source Reference: [3]

Comparable Event 1: Oracle Announces Fiscal 2024 First Quarter Financial Results (2023-09-11)

Similarity: Oracle reported quarterly results and updated forward guidance, a comparable company-specific macro-sensitive event where changing federal or regulatory conditions can materially affect demand and expectations.

Observed Stock Reaction: 0.31% after 1 trading day; -9.82% after 5 trading days; -12.95% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: -9.69% versus SPY.

Historical Source References: [12], [8]

Comparable Event 2: Oracle Announces Fiscal 2025 First Quarter Financial Results (2024-09-09)

Similarity: Oracle released quarterly results alongside large RPO and cloud-demand commentary, a materially similar investor-relations disclosure that can reframe growth assumptions and capital-allocation plans.

Observed Stock Reaction: -1.35% after 1 trading day; 14.26% after 5 trading days; 20.49% after 20 trading days.

Market-Adjusted 5-Trading-Day Reaction: 10.25% versus SPY.

Historical Source References: [13], [8]

Historical Impact Estimate: The 2 usable analogue reactions had a median 5-trading-day market-adjusted move of 0.28% and a range of -9.69% to 10.25%. At the current price of \$139.17, this corresponds to an estimated per-share effect near +\$0.39 with an observed analogue range of -\$13.49 to +\$14.27. Confidence: Low-to-Medium. This is a historical scenario estimate, not a prediction or proof of causation.

Risks and Limitations

- Source coverage is limited to the verified catalog, and no Oracle-specific filing, earnings release, customer announcement, or regulatory action appears in the provided events.
- Causal uncertainty is high because the supported items are mostly peer or macro headlines, so any Oracle impact is inferred rather than directly demonstrated.

Risks and Limitations (continued...)

- Market pricing may already reflect the published information, especially for the broad sector and litigation-related items.

What Would Change the View

- An Oracle-issued press release, SEC filing, or earnings update showing contract wins, guidance changes, margin changes, or capital-return actions would materially improve confidence.
- A directly reported Oracle customer, supplier, regulator, or competitor event with explicit operating exposure would provide a clearer company-specific transmission channel.
- A verified market move or analyst revision explicitly tied to Oracle's shares, revenue outlook, or valuation would support a stronger directional view.

Sources

1. [Persistent Achieves \\$452.40M Revenue in Q1 FY27 with 16.10% YoY Growth \(PRNewswire\)](#) | Published 2026-08-02 | [Open source](#)
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3. [States expand student loan options as new federal borrowing caps take effect — but they come with trade-offs \(CNBC\)](#) | Published 2026-08-02 | [Open source](#)
4. [Capricor Investor News: If You Have Suffered Losses in Capricor Therapeutics Inc., You Are Encouraged to Contact The Rosen Law Firm About Your Rights \(GlobeNewswire\)](#) | Published 2026-08-02 | [Open source](#)
5. [PODD Investors Have Opportunity to Lead Insulet Corporation Securities Fraud Lawsuit \(PRNewswire\)](#) | Published 2026-08-02 | [Open source](#)

Sources (continued...)

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9. [Oracle Announces Fiscal 2023 Fourth Quarter and Fiscal Full Year Financial Results \(Oracle Investor Relations / PRNewswire\)](#) | Event date 2023-06-12 | [Open source](#)
10. [Oracle Announces Fiscal Year 2026 Third Quarter Financial Results \(Oracle Investor Relations\)](#) | Event date 2026-03-10 | [Open source](#)
11. [Oracle Announces Fiscal Year 2026 Second Quarter Financial Results \(Oracle Investor Relations\)](#) | Event date 2025-12-10 | [Open source](#)
12. [Oracle Announces Fiscal 2024 First Quarter Financial Results \(Oracle Investor Relations\)](#) | Event date 2023-09-11 | [Open source](#)
13. [Oracle Announces Fiscal 2025 First Quarter Financial Results \(Oracle Investor Relations\)](#) | Event date 2024-09-09 | [Open source](#)

Political Trades Over Last 30 Days - (ORCL) Oracle Corporation

Data Availability

No qualifying political trades were identified for Oracle Corporation during the last 30 days from the configured political-disclosure sources.

Impact on Analysis

Neutral.

Market Coverage Note

Political-trade coverage is limited to United States financial markets and reflects disclosures located by the configured sources during this report run.

Source References: [1], [2], [3], [4]

Sources

1. [CapitolExposed disclosures for ORCL](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Capitol Trades disclosure database](#) | Retrieved 2026-08-03 | [Open source](#)
3. [CongressInvests disclosure database](#) | Retrieved 2026-08-03 | [Open source](#)
4. [Bargo congressional trading data](#) | Retrieved 2026-08-03 | [Open source](#)

Insider Trades Over Last 30 Days - (ORCL) Oracle Corporation

Data Availability

No qualifying insider trades were identified for Oracle Corporation during the stated 30-day period.

Impact on Analysis

Neutral.

Market Coverage Note

The supplied data indicates that insider trading information is only available for United States financial markets, which limits coverage to U.S. market reporting for ORCL.

Source References: [1]

Sources

1. [Yahoo Finance insider transactions for ORCL](#) | Retrieved 2026-08-03 | [Open source](#)

Industry Analysis - (ORCL) Oracle Corporation

Decision Takeaway

Oracle's industry position is Mixed. The strongest industry advantage is its entrenched enterprise software footprint, which supports switching costs and cross-sell opportunities. The greatest industry risk is intense competitive pressure from larger cloud platforms and faster-growing infrastructure software peers, which can constrain re-rating potential.

Relative Valuation

Selected Comparable Companies.

Peer Company	Ticker	Market Cap	Trailing P/E	EV/EBITDA	Price/Free Cash Flow
Palo Alto Networks, Inc.	PANW	\$279.33 billion	295.47x	181.64x	78.04x
Palantir Technologies Inc.	PLTR	\$299.80 billion	140.51x	142.35x	171.02x
Cisco Systems, Inc.	CSCO	\$452.87 billion	38.30x	27.84x	48.76x
Dell Technologies Inc.	DELL	\$271.55 billion	33.43x	20.13x	49.97x
International Business Machines Corporation	IBM	\$213.62 billion	20.16x	16.27x	17.73x

Peer selection: 5 direct comparable companies were selected from 30 scored candidates using exact industry or exact-industry source, business-description similarity, market-capitalization and revenue scale, country and reporting currency, availability of P/E, EV/EBITDA, and price/free-cash-flow, independent provider evidence.

Selected peer tickers: PANW, PLTR, CSCO, DELL, IBM.

Valuation Comparison Summary.

Relative Valuation (continued...)

Metric	Company	Industry Median	Sector Median	Relative Position
Trailing P/E	23.87x	33.43x	44.38x	28.60% below selected-peer median
EV/EBITDA	16.89x	20.13x	Not available	16.06% below selected-peer median
Price/Free Cash Flow	Not available	49.97x	Not available	Company metric unavailable

Peer Multiple Distribution.

Metric	P25	Median	P75	Valid Peer Observations
Trailing P/E	26.79x	33.43x	35.87x	3
EV/EBITDA	18.20x	20.13x	23.98x	3
Price/Free Cash Flow	48.76x	49.97x	78.04x	5

Composite direct-peer assessment: Discount to selected peers across 2 validated metric(s); median relative difference 22.33% below the selected-peer medians.

Historical Valuation Context.

Metric	Current	Historical Median	Historical Range	Observations
Trailing P/E	23.87x	36.32x	31.59x to 38.73x	4
EV/EBITDA	16.89x	21.65x	19.32x to 23.72x	4
Price/Free Cash Flow	Not available	31.31x	28.02x to 34.60x	2

Peer-set quality: 3 valuation metric(s) passed validation across 5 industry peers and 99 sector peers. Candidate universe: 30. Peer-valuation quality score: 10.00/10. Providers used: Yahoo Finance, Yahoo Screener. Multiples are context measures, not stand-alone buy or sell signals.

Competitive Position

- Oracle benefits from sticky enterprise deployments and integrated product breadth, which raises switching costs and makes multi-year customer relationships more durable. This matters because retention and expansion can support steadier operating leverage than in more transactional software models.
- Against named peers such as IBM and CSCO, Oracle appears positioned between mature cash-generative incumbents and higher-growth, higher-multiple infrastructure software names like PANW and PLTR. That mix is decision-relevant because it suggests Oracle can defend profitability, but it may not command the same growth premium as the most aggressively valued peers.
- Competitive intensity remains high across databases, middleware, and cloud infrastructure, where buyers can compare Oracle with large-scale vendors and specialized point solutions. This matters because pricing power is likely selective rather than universal, which can limit margin expansion in contested deal cycles.

Industry Risks and Limitations

- The selected five-peer set is useful for valuation anchoring, but it is still narrow and mixes software infrastructure with adjacent technology businesses, so it can understate segment-specific differences in growth and profitability.
- The broader sector sample is much larger, but only one sector EV/EBITDA metric validated, so cross-sector comparison is less reliable than the peer-based P/E and price/free-cash-flow signals.
- Oracle's industry exposure includes cyclical enterprise spending and cloud migration timing, which can create uneven booking patterns even when long-term demand remains intact. This matters because short-term valuation multiples can shift quickly around implementation cycles and budget pauses.

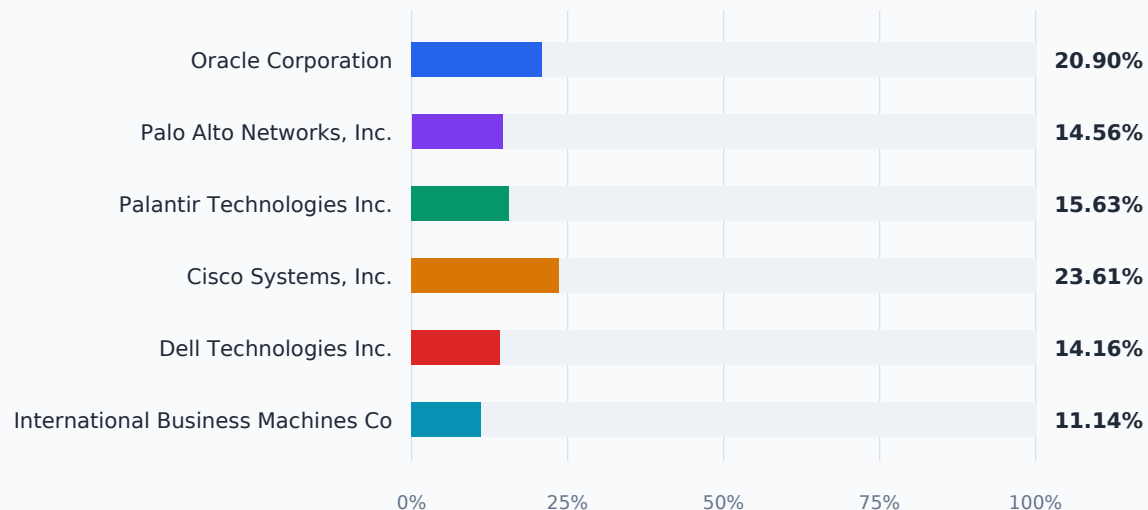
What Would Change the View

- A sustained acceleration in cloud infrastructure growth, with clear evidence of durable share gains and improving margin mix, would strengthen the industry outlook materially.
- A meaningful expansion in enterprise renewal rates, net revenue retention, or database modernization wins versus incumbent and adjacent peers would improve confidence in Oracle's pricing power.
- A visible slowdown in cloud adoption, larger-than-expected competitive displacement, or a sharper multiple compression versus the validated peer set would weaken the assessment.

Market Share

Basis: selected comparable-company market capitalization in USD; 5 same-currency direct peers plus the target; canonical peer data retrieved 2026-08-03. This is a valuation-scale proxy within the selected peer group, not operating-market share or total-addressable-market share.

Selected Peer Group Market Capitalization Share



Source References: [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [11] [12] [13] [14] [15] [16] [17]

Sources

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15. [Yahoo Finance valuation and company summary for peer IBM](#) | Retrieved 2026-08-03 | [Open source](#)

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17. [Yahoo Finance short-interest and options data for ORCL](#) | Retrieved 2026-08-03 | [Open source](#)

Financial Analysis - (ORCL) Oracle Corporation

Decision Takeaway

Oracle's financial profile is Mixed. The strongest factor is durable earnings power, supported by 25.37% profit margin, 33.32% operating margin, and 54.28% return on equity. The greatest risk is leverage and cash-flow strain, with debt-to-equity at 3.67x and free cash flow at -USD 23.69 billion TTM, while the valuation implication is constructive because the 23.87x trailing P/E sits below the 33.43x industry P/E.

Key Financial Metrics

Metric	Current Value	Signal
Market Cap	\$400.88 billion	Favorable
P/E Ratio TTM	23.87x	Favorable
EPS TTM	5.83 USD per share	Favorable
PEG Ratio	0.73x	Favorable
Dividend Yield	1.44%	Neutral
Beta	1.71x	Unfavorable
Revenue	\$67.36 billion	Favorable
Net Income	\$17.09 billion	Favorable
Profit Margin	25.37%	Favorable
Operating Margin	33.32%	Favorable
Return on Equity	54.28%	Favorable
Debt-to-Equity Ratio	3.67x	Unfavorable
Operating Cash Flow	\$31.98 billion	Favorable
Free Cash Flow	\$-23.69 billion	Unfavorable
Forward P/E	12.78x	Favorable
Revenue Growth	11.60%	Neutral
Earnings Growth	15.67%	Favorable

Key Evidence

- Oracle's profitability remains the clearest support for the equity case, because a 25.37% profit margin and 33.32% operating margin indicate that core operations are still converting revenue into substantial earnings.
- The valuation screen is not demanding relative to peers, since the 23.87x trailing P/E and 12.78x forward P/E both sit below the 33.43x industry reference, which implies upside if execution remains stable.
- Cash generation quality is the main caution, because operating cash flow is strong at USD 31.98 billion TTM, but free cash flow is negative at USD 23.69 billion TTM after heavy investment spending.

Financial Strengths

- Oracle's return on equity of 54.28% shows efficient use of shareholder capital and supports a premium-quality earnings profile.
- Revenue growth of 11.60% and earnings growth of 15.67% indicate that the business is still expanding while maintaining profitability.
- The dividend yield of 1.44% and payout ratio of 34.31% suggest the dividend remains covered by earnings, which supports shareholder return stability.

Risks and Limitations

- Debt-to-equity of 3.67x is elevated and reduces financial flexibility, especially if growth spending or refinancing conditions become less favorable.
- Free cash flow is negative at USD 23.69 billion TTM, which signals that current capital intensity is pressuring near-term internal financing capacity.
- Beta of 1.71x implies materially higher share-price volatility than the market, and it limits the defensive quality of the investment case.

What Would Change the View

- The assessment would improve if free cash flow turned positive on a sustained basis while operating cash flow remained above USD 30.00 billion annually.
- The assessment would improve if debt-to-equity fell meaningfully from 3.67x without sacrificing revenue growth above 10.00% annually.
- The assessment would weaken if revenue growth fell below 5.00% annually or if profit margin compressed materially below 20.00%.

Overall Financial Assessment

Oracle offers attractive long-term growth potential and reasonable valuation relative to peers, but the balance sheet is leveraged and free cash flow is currently negative. Earnings quality and margins are strong, yet capital intensity and higher volatility remain the principal warnings. Overall, the profile is investable but not low-risk, with execution and cash conversion the key determinants.

Source References: [1], [2]

Sources

1. [Yahoo Finance company summary and structured statements](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Yahoo Finance historical prices](#) | Retrieved 2026-08-03 | [Open source](#)

Analyst Expectations - (ORCL) Oracle Corporation

Decision Takeaway

Favorable. The mean analyst target is 78.30% versus the current price, while consensus currently reflects next-year EPS growth of 35.26% and next-year revenue growth of +46.07%. Confidence is Medium-High because analyst views can change quickly after new information.

Consensus Snapshot

Measure	Consensus	Range or coverage	Plain-English meaning
Mean price target	\$248.15	\$110.00 to \$400.00; 41 analyst(s)	The average published analyst estimate for a future share price, not a guarantee.
Recommendation mix	Buy	44 recorded opinion(s)	Shows the distribution of published analyst ratings; it is not the report's own recommendation.
Next earnings date	2026-09-09	Scheduled or provider-estimated	The next major date when estimates may change materially.

Earnings and Revenue Estimates

Horizon	EPS estimate	EPS growth	Revenue estimate	Revenue growth	Analyst coverage
Current quarter	1.74 per share	18.28%	\$19.12 billion	28.12%	33
Next quarter	1.89 per share	-16.54%	\$21.15 billion	31.69%	32
Current year	8.05 per share	5.52%	\$89.32 billion	32.60%	42
Next year	10.89 per share	35.26%	\$130.47 billion	46.07%	40

Estimate Trend and Revisions

Horizon	Current EPS estimate	30 days ago	90 days ago	Direction
Current quarter	1.74	1.73	1.68	Higher
Next quarter	1.89	1.88	1.83	Higher
Current year	8.05	8.04	8.03	Higher
Next year	10.89	10.92	10.71	Lower

Revision counts for Current quarter: 19 upward and 6 downward revision(s) over the latest 30-day provider window.

Revision counts for Next quarter: 20 upward and 5 downward revision(s) over the latest 30-day provider window.

Revision counts for Current year: 21 upward and 12 downward revision(s) over the latest 30-day provider window.

Revision counts for Next year: 20 upward and 6 downward revision(s) over the latest 30-day provider window.

Earnings Calendar and Surprise History

Next earnings date: 2026-09-09. Dates can change and should be confirmed with the company or exchange.

Across 4 available historical observation(s), earnings exceeded the consensus estimate 3 time(s), with an average surprise of +12.66%.

Period	Consensus EPS	Reported EPS	Surprise
2025-08-31	1.48	1.47	-0.62%
2025-11-30	1.64	2.26	38.04%
2026-02-28	1.69	1.79	5.69%
2026-05-31	1.96	2.11	7.52%

Recent Rating and Target Changes

Date	Firm	Action	Rating change	Price-target change
2026-07-20	CLSA	init	Hold	\$0.00 to \$145.00
2026-06-11	Bernstein	main	Outperform to Outperform	\$319.00 to \$325.00
2026-06-11	RBC Capital	reit	Sector Perform to Sector Perform	\$190.00 to \$190.00
2026-06-11	TD Cowen	reit	Buy to Buy	\$300.00 to \$300.00
2026-06-11	Barclays	main	Overweight to Overweight	\$240.00 to \$250.00
2026-06-11	Cantor Fitzgerald	reit	Overweight to Overweight	\$284.00 to \$284.00
2026-06-11	Wedbush	main	Outperform to Outperform	\$275.00 to \$240.00
2026-06-11	Stephens & Co.	reit	Equal-Weight to Equal-Weight	\$164.00 to \$164.00

Management Guidance Context

No specific management-guidance change was identified in the completed verified-news section. Review the Newsworthy Events and Financial Analysis sections for the latest company outlook evidence.

Risks and Limitations

- Analyst estimates are opinions and can change after earnings, guidance, industry developments, or market moves.
- Consensus values may combine analysts using different methods, time horizons, and assumptions.
- A price target is not a forecast guarantee and should be considered alongside valuation, cash flow, risk, and technical evidence.

What Would Change the View

- Broad upward revisions to EPS and revenue estimates, supported by stronger company guidance, would improve the consensus outlook.
- Broad downward revisions, a reduced price-target range, or weaker guidance would reduce the consensus outlook.
- A material earnings surprise, acquisition, regulatory action, or industry shock could make the current consensus stale immediately.

Sources

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2. [Yahoo Finance earnings calendar and history for ORCL](#) | Retrieved 2026-08-03 | [Open source](#)

Technical Analysis - (ORCL) Oracle Corporation

Decision Takeaway

The near-term technical setup is Mixed. The strongest confirming signal is the EMA5 reading of 124.79, while the strongest conflicting signal is the EMA50 reading of 150.25 (Bearish). Price is below the 200-day EMA, and the key invalidation level is 126.25.

Indicator Summary

Indicator	Value	Signal
EMA5	124.79	Bullish
EMA10	124.87	Bullish
EMA20	131.58	Bullish
EMA50	150.25	Bearish
EMA200	169.26	Bearish
MACD	-8.67	Bearish
Stochastic %K	75.46	Bullish
Stochastic %D	49.59	Bearish
Latest RSI	51.56	Neutral

Market Context and Risk Metrics

Metric Value Plain-English meaning

Calculation basis Yahoo Finance price and volume data retrieved 2026-08-03
Every displayed indicator and price relationship was calculated deterministically in Python from the cited historical market data.

Market Context and Risk Metrics (continued...)

14-day average true range	7.94 (5.70% of price)	Typical daily price movement; a larger value means wider normal swings.
14-day ADX	38.20	Measures trend strength, not direction; this reading indicates a strong trend.
Relative volume	0.69x	Latest volume divided by the prior 20-day average; above 1.00x means activity is heavier than usual.
Return versus S&P 500	6 months -24.16%, 1 year -64.37%	Positive means the stock outperformed the broad U.S. market over the same period.
Return versus XLK	6 months -38.44%, 1 year -80.51%	Shows whether performance is stronger or weaker than a relevant sector fund.
52-week position	-59.29% from high, 21.55% from low	Shows where the current price sits within its one-year trading range.
Short interest	2.91% of float, 1.39 days to cover	Higher short interest can signal skepticism and can also increase squeeze risk.

Options-implied earnings move +/- 19.74% or about 27.48 per share The at-the-money call-plus-put price suggests the market is pricing this approximate move through 2026-09-11; it is not a direction forecast.

Key Price Levels

Level	Value	Interpretation
Pivot Point	129.32	Reference level
R1	132.95	Resistance
R2	136.02	Resistance
R3	139.65	Resistance
S1	126.25	Support
S2	122.62	Support
S3	119.55	Support

Technical Interpretation

- Price at 139.17 is below the 200-day EMA at 169.26; MACD is -8.67.
- RSI is 51.56; stochastic %K/%D are 75.46/49.59, indicating no extreme oscillator condition.
- The pivot is 129.32, with first resistance at 132.95 and first support at 126.25; a sustained break should define the next directional move.

Risks and Limitations

- The indicator set contains a direct conflict between bullish short-term averages and bearish longer-term averages, which can produce whipsaw signals.
- The bearish MACD and only neutral RSI limit confidence that the recent advance is sustainable without additional confirmation.
- A rejection near R3 or a loss of R2 could create a false breakout pattern, especially if volume does not expand.

What Would Change the View

- A close above R1 at 132.95 with follow-through and improving momentum would strengthen the bullish case.
- A sustained move below S1 at 126.25 would weaken the setup and increase downside risk.
- RSI cooling from 51.56 toward a neutral range while price holds support would reduce exhaustion risk; renewed acceleration above 70.00 without price confirmation would increase it.

Source References: [1], [2]

Sources

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Dividend Yield Analysis - (ORCL) Oracle Corporation

Decision Takeaway

Neutral. The dividend appears covered, but the calculated yield of 1.44% is modest and is unlikely to be the primary investment return driver.

Dividend Profile

Measure	Value	Interpretation
Selected annual dividend	2.00 USD per share	Forward indicated annual dividend
Forward indicated annual dividend	2.00 USD per share	Shown separately from trailing cash payments.
Trailing twelve-month dividend paid	2.00 USD per share	Sum of supported dividend payments over the latest year.
Calculated current yield	1.44%	Selected annual dividend divided by the canonical current price.
Calculated payout ratio	34.31%	Selected annual dividend divided by trailing EPS when trailing EPS is positive.
Split-adjustment basis	Latest reported split factor 2:1 on 2000-10-13	Forward and trailing values are not blended across different adjustment bases.
Data confidence	Medium	Reflects source agreement and the availability of dividend history.

Sustainability

- Earnings coverage is represented by a calculated payout ratio of 34.31% based on the selected annual dividend and trailing EPS.
- Forward and trailing dividend values remain separately labeled so a stock split or provider timing difference cannot create a false growth signal.
- Sustainability still depends on future earnings, free cash flow, leverage, and management's capital-allocation priorities.

Risks and Limitations

- Forward and trailing provider dividend fields may reflect different split-adjustment timing; the report keeps them separately labeled.
- A low yield can remain economically immaterial even when payment coverage is strong.
- Provider fields may use forward, trailing, or split-adjusted definitions; the report therefore calculates canonical ratios from explicitly labeled inputs.

What Would Change the View

- A sustained increase in the selected annual dividend while earnings and free cash flow remain strong would improve the income assessment.
- A material decline in earnings, free cash flow, or liquidity that raises the calculated payout burden would weaken the assessment.
- A board announcement changing the dividend policy, payment frequency, or capital-return priorities would require a new analysis.

Source References: [1], [2]

Sources

1. [Yahoo Finance summary fields](#) | Retrieved 2026-08-03 | [Open source](#)
2. [Yahoo Finance dividend history](#) | Retrieved 2026-08-03 | [Open source](#)

Discounted Cash Flow Analysis - (ORCL) Oracle Corporation

Decision Takeaway

The deterministic DCF intrinsic value per share is 21.98 USD. Compared with the current price of 139.17 USD, the security appears Overvalued. The valuation passed 46 mathematical checks with High source-data confidence, High forecast-assumption confidence, and High overall confidence. Economic-plausibility status: Passed.

Valuation Framework

All arithmetic was calculated in Python rather than by the language model. FCFF equals $EBIT \times (1 - \text{tax rate}) + D\&A - \text{capital expenditures} - \text{change in net working capital}$; forecast cash flows are discounted at WACC and enterprise value is converted to equity value.

Key Current Financial Inputs

Input	Value	Unit or Basis
Current share price	\$139.17 per share	current quote
Market capitalization	\$400.88 billion	current
Diluted shares	2,915.00	million shares; latest balance sheet
Revenue	\$67.36 billion	TTM from latest four quarters
EBIT	\$22.44 billion	TTM from latest four quarters
EBITDA	\$33.45 billion	TTM from latest four quarters
Net income	\$17.09 billion	TTM from latest four quarters
D&A	\$9.29 billion	TTM from latest four quarters
Capital expenditures	\$55.66 billion	TTM from latest four quarters
Change in NWC	\$-4.13 billion	TTM from latest four quarters
Operating cash flow	\$31.98 billion	TTM from latest four quarters
Free cash flow	\$-23.69 billion	TTM from latest four quarters
Cash and equivalents	\$31.89 billion	latest balance sheet
Total debt	\$156.19 billion	latest balance sheet
Tax rate	12.62%	TTM
Beta	1.71	ratio; current

Forecast Assumptions

Assumption	Year or Period	Value	Rationale
Revenue growth	Year 1	18.83%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 2	16.43%	Deterministic fade from resolved forward/historical growth toward terminal growth.

Forecast Assumptions (continued...)

Assumption	Year or Period	Value	Rationale
Revenue growth	Year 3	14.13%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 4	11.95%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 5	9.88%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 6	7.96%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 7	6.21%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 8	4.64%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 9	3.34%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Revenue growth	Year 10	2.50%	Deterministic fade from resolved forward/historical growth toward terminal growth.
Operating margin	Year 1	33.22%	Deterministic normalization from current margin toward the historical target.

Forecast Assumptions (continued...)

Assumption	Year or Period	Value	Rationale
Operating margin	Year 2	33.11%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 3	33.01%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 4	32.91%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 5	32.81%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 6	32.71%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 7	32.61%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 8	32.50%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 9	32.47%	Deterministic normalization from current margin toward the historical target.
Operating margin	Year 10	32.47%	Deterministic normalization from current margin toward the historical target.
Tax rate	Years 1-10	12.62%	Resolved effective or normalized tax rate.
D&A	Years 1-10	11.91% of revenue	Historical median D&A as a percentage of revenue, with a current-period fallback.

Forecast Assumptions (continued...)

Assumption	Year or Period	Value	Rationale
Capital expenditures	Years 1-10	27.18% of revenue	Historical median capital expenditures as a percentage of revenue, with a current-period fallback.
Change in NWC	Years 1-10	16.23% of incremental revenue	Historical median change in NWC as a percentage of incremental revenue, with a normalized fallback.
Terminal growth	Terminal period	2.50%	Configured long-run rate constrained to remain at least 2.50% below the applicable discount rate.

WACC Assumptions

Input	Value	Rationale
Risk-free rate	4.68%	Federal Reserve FRED DGS10
Equity risk premium	5.00%	Configured long-run market risk premium.
Raw source beta	1.71	Direct structured or verified-web beta before economic-reasonableness normalization.
Effective beta	1.71	Resolved raw beta 1.71; effective beta 1.71. No beta normalization was required.
Minimum cost-of-equity spread	3.50%	Minimum required premium over the risk-free rate.
Cost of equity	13.24%	Risk-free rate plus the larger of beta-implied or minimum required equity-risk spread.
Pre-tax cost of debt	2.94%	TTM interest expense divided by current total debt.
After-tax cost of debt	2.57%	Pre-tax cost of debt multiplied by one minus the tax rate.
Capital structure - equity	72.20%	Market-value weight.
Capital structure - debt	27.80%	Market-value weight.
WACC before floor	10.27%	Raw market-value weighted cost of capital before the minimum spread guardrail.
Minimum WACC spread	2.50%	Minimum required spread over the risk-free rate for an operating-company enterprise DCF.

Effective WACC 10.27% Market-value weighted WACC before floor 10.27%; effective WACC 10.27%. A configurable minimum spread of 2.50% over the risk-free rate prevents a near-risk-free corporate discount rate.

Forecasted Cash Flow

Year	Revenue	EBIT Margin	After-Tax EBIT	D&A	Capital Expenditures	Change in NWC	FCFF
1	\$80.04 billion	33.22%	\$23.23 billion	\$9.53 billion	\$21.76 billion	\$2.06 billion	\$8.95 billion
2	\$93.19 billion	33.11%	\$26.97 billion	\$11.10 billion	\$25.33 billion	\$2.13 billion	\$10.60 billion
3	\$106.36 billion	33.01%	\$30.68 billion	\$12.67 billion	\$28.91 billion	\$2.14 billion	\$12.30 billion
4	\$119.06 billion	32.91%	\$34.24 billion	\$14.18 billion	\$32.37 billion	\$2.06 billion	\$13.99 billion
5	\$130.83 billion	32.81%	\$37.51 billion	\$15.58 billion	\$35.56 billion	\$1.91 billion	\$15.62 billion
6	\$141.25 billion	32.71%	\$40.37 billion	\$16.82 billion	\$38.40 billion	\$1.69 billion	\$17.11 billion
7	\$150.02 billion	32.61%	\$42.74 billion	\$17.87 billion	\$40.78 billion	\$1.42 billion	\$18.41 billion
8	\$156.98 billion	32.50%	\$44.59 billion	\$18.70 billion	\$42.67 billion	\$1.13 billion	\$19.48 billion
9	\$162.23 billion	32.47%	\$46.03 billion	\$19.32 billion	\$44.10 billion	\$851.12 million	\$20.40 billion
10	\$166.28 billion	32.47%	\$47.18 billion	\$19.80 billion	\$45.20 billion	\$658.18 million	\$21.12 billion

Cash Flow Discounting

Year	FCFF	Discount Factor	Present Value
1	\$8.95 billion	0.91	\$8.11 billion
2	\$10.60 billion	0.82	\$8.72 billion
3	\$12.30 billion	0.75	\$9.17 billion
4	\$13.99 billion	0.68	\$9.46 billion
5	\$15.62 billion	0.61	\$9.58 billion
6	\$17.11 billion	0.56	\$9.51 billion
7	\$18.41 billion	0.50	\$9.28 billion
8	\$19.48 billion	0.46	\$8.91 billion
9	\$20.40 billion	0.41	\$8.46 billion
10	\$21.12 billion	0.38	\$7.94 billion

Total explicit forecast PV \$89.15 billion Sum of all displayed yearly present values

Terminal Value

Gordon Growth terminal value uses terminal growth of 2.50% and WACC of 10.27%. Terminal cash flow is \$21.65 billion; terminal value is \$278.50 billion, with a present value of \$104.73 billion.

Enterprise Value to Equity Value Bridge

Bridge Item	Value
Present value of explicit cash flow	\$89.15 billion
Present value of terminal value	\$104.73 billion
Enterprise value	\$193.88 billion
Cash	\$31.89 billion
Debt	\$-156.19 billion
Preferred stock	\$-4.95 billion
Minority interest	\$-548.00 million

Minority interest provenance Yahoo Finance quarterly_balance_sheet; field: Minority Interest; period: 2026-05-31; derivation: Direct structured value; confidence: A

Preferred stock provenance Yahoo Finance quarterly_balance_sheet; field: Preferred Stock; period: 2026-05-31; derivation: Direct structured value; confidence: A

Net cash adjustment	\$-124.30 billion
Total other adjustments	\$-5.50 billion

Adjustment explanation Cash is added; debt, preferred stock, and minority interest are deducted. No unclassified adjustment is included.

Equity value	\$64.08 billion
Diluted shares	2,915.00 million shares
Intrinsic value per share	\$21.98 per share

Sensitivity Analysis

WACC \ g	2.00%	2.50%	3.00%
9.27%	29.48	32.79	36.63
10.27%	19.65	21.98 BASE	24.64
11.27%	11.97	13.68	15.58

Sensitivity Analysis (continued...)

DCF Intrinsic Value Sensitivity

	2.00%	2.50%	3.00%
9.27%	\$29.48	\$32.79	\$36.63
10.27%	\$19.65	\$21.98 BASE	\$24.64
11.27%	\$11.97	\$13.68	\$15.58

DCF Scenarios

Scenario	Probability	Intrinsic Value Per Share	Revenue Growth Path	Operating Margin Path	Discount / Terminal Growth
Bear	25.00%	-9.31 USD	13.43% to 2.00%	30.22% to 29.47%	11.77% / 2.00%
Base	50.00%	21.98 USD	18.83% to 2.50%	33.22% to 32.47%	10.27% / 2.50%
Bull	25.00%	42.02 USD	20.71% to 2.75%	34.72% to 33.97%	9.77% / 2.75%

Probability-weighted DCF value **19.17 USD per share** **25.00% Bear, 50.00% Base, and 25.00% Bull weighting.**

Scenario valuation range	-9.31 to 42.02 USD per share	Deterministic Bear-to-Bull range; not a guarantee.
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Scenario Evidence.

Scenario Evidence and Assumption Basis

DCF Scenarios (continued...)

Bear Forward growth anchor: 20.60% from Yahoo Finance summary; exact field: revenueGrowth; period or row range: current provider snapshot. Historical revenue evidence: approximately 10.48% CAGR across 4 resolved annual periods, 2023-05-31 through 2026-05-31; exact statement field: Total Revenue. Margin evidence: current TTM EBIT margin is 33.32%; the base path starts at 33.22% and ends at 32.47%. Discount-rate evidence: risk-free rate 4.68%, beta 1.71, equity risk premium 5.00%, and base WACC 10.27%. Bear transformation: retain 70.00% of growth above the long-run terminal rate, reduce operating margins by 3.00 percentage points, increase the discount rate by 1.50 percentage points, and reduce terminal growth by 0.50 percentage points.

Base Forward growth anchor: 20.60% from Yahoo Finance summary; exact field: revenueGrowth; period or row range: current provider snapshot. Historical revenue evidence: approximately 10.48% CAGR across 4 resolved annual periods, 2023-05-31 through 2026-05-31; exact statement field: Total Revenue. Margin evidence: current TTM EBIT margin is 33.32%; the base path starts at 33.22% and ends at 32.47%. Discount-rate evidence: risk-free rate 4.68%, beta 1.71, equity risk premium 5.00%, and base WACC 10.27%. Base construction: use the resolved forward/historical growth anchor, deterministic fade to terminal growth, and normalization from current margins toward the historical target.

Bull Forward growth anchor: 20.60% from Yahoo Finance summary; exact field: revenueGrowth; period or row range: current provider snapshot. Historical revenue evidence: approximately 10.48% CAGR across 4 resolved annual periods, 2023-05-31 through 2026-05-31; exact statement field: Total Revenue. Margin evidence: current TTM EBIT margin is 33.32%; the base path starts at 33.22% and ends at 32.47%. Discount-rate evidence: risk-free rate 4.68%, beta 1.71, equity risk premium 5.00%, and base WACC 10.27%. Bull transformation: retain 110.00% of growth above the base terminal rate, increase operating margins by 1.50 percentage points, reduce the discount rate by 0.50 percentage points, and increase terminal growth by 0.25 percentage points subject to the discount-rate guardrail.

Input Confidence and Provenance

Input	Value	Confidence	Source and Derivation
Current Price	139.17 USD per share	A	Yahoo Finance summary; field: currentPrice; period: current quote
Market Cap	\$400.88 billion	A	Yahoo Finance summary; field: marketCap; period: current
Diluted Shares	2,915.00 million shares	A	Yahoo Finance quarterly_financials; field: Diluted Average Shares; period: 2026-05-31
Revenue Ttm	\$67.36 billion	A	Yahoo Finance quarterly_financials; field: Total Revenue; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Ebit Ttm	\$22.44 billion	A	Yahoo Finance quarterly_financials; field: Operating Income; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Ebitda Ttm	\$33.45 billion	A	Yahoo Finance quarterly_financials; field: EBITDA; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Net Income Ttm	\$17.09 billion	A	Yahoo Finance quarterly_financials; field: Net Income; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Depreciation Ttm	\$9.29 billion	A	Yahoo Finance quarterly_cashflow; field: Depreciation And Amortization; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Capex Ttm	\$55.66 billion	A	Yahoo Finance quarterly_cashflow; field: Capital Expenditure; period: 2026-05-31; derivation: Sum of latest four quarterly statement values

Input Confidence and Provenance (continued...)

Input	Value	Confidence	Source and Derivation
Change Nwc Ttm	\$-4.13 billion	A	Yahoo Finance quarterly_cashflow; field: Change In Working Capital; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Operating Cash Flow Ttm	\$31.98 billion	A	Yahoo Finance quarterly_cashflow; field: Operating Cash Flow; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Free Cash Flow Ttm	\$-23.69 billion	A	Yahoo Finance quarterly_cashflow; field: Free Cash Flow; period: 2026-05-31; derivation: Sum of latest four quarterly statement values
Cash	\$31.89 billion	A	Yahoo Finance quarterly_balance_sheet; field: Cash Cash Equivalents And Short Term Investments; period: 2026-05-31
Debt	\$156.19 billion	A	Yahoo Finance quarterly_balance_sheet; field: Total Debt; period: 2026-05-31
Preferred Stock	\$4.95 billion	A	Yahoo Finance quarterly_balance_sheet; field: Preferred Stock; period: 2026-05-31
Minority Interest	\$548.00 million	A	Yahoo Finance quarterly_balance_sheet; field: Minority Interest; period: 2026-05-31

Tax Rate 12.62% A Derived from Yahoo Finance income statement; field: tax provision / pretax income; period: TTM; derivation: Absolute tax provision divided by pre-tax income

Beta 1.71 ratio A Yahoo Finance summary; field: beta; period: current

Mathematical Validation

Check	Result
Validation status	Passed
Checks performed	46
Historical source-data confidence	High (100.00%)
Forecast-assumption confidence	High (96.00%)
Overall DCF confidence	High (98.20%)
Economic-plausibility status	Passed
Beta normalization	Not required
Verified web fallback used	No
Verified web fallback metrics	None
Verified web source count	0
Terminal-value share	54.02%
Discount-rate spread over risk-free rate	5.59%
FCFF arithmetic	Passed
Discounting arithmetic	Passed
Enterprise/equity bridge	Passed
Per-share reconciliation	Passed
Sensitivity base-case reconciliation	Passed

Interpretation

Oracle's deterministic DCF indicates the shares screen as overvalued at the current price, with value driven primarily by the path from high near-term growth to a lower terminal growth rate and the normalization of operating margins. The terminal value remains a major component of the valuation. High input confidence means the resolved assumptions and source-derived inputs were internally consistent and validated, but it does not reduce fundamental business uncertainty.

Risks and Limitations

- Forecast uncertainty is elevated because the model depends on a multi-year fade in revenue growth and margin stability that may not materialize as assumed.
- Terminal-value dependence is significant, so relatively small changes in long-run growth or discount rate would materially alter the deterministic result.
- Oracle's software and cloud business may be less cyclical than many industries, but the valuation still depends on sustained execution, and the supplied warnings list no fallback adjustments.

What Would Change the View

- A sustained improvement in revenue growth above the modeled trajectory, especially if it is accompanied by better recurring-cloud monetization, would raise the deterministic DCF value.
- A higher and more durable operating margin profile than the modeled fade would increase value, while a margin shortfall would lower it.
- A lower discount rate or a higher justified terminal growth rate would materially increase value, while weaker capital-market conditions or slower long-run growth would reduce it.

Sources

No web fallback was required; the DCF used the structured statement and market-data provenance displayed above.

Intrinsic Fair Value DCF Method: 21.98

Valuation Methodology - (ORCL) Oracle Corporation

Decision Takeaway

Oracle's EPS-based valuation is Mixed. The supplied intrinsic value of USD 194.92 is above the current market price of USD 139.17, but the peer-median trailing P/E of 33.43x is materially higher than Oracle's trailing P/E of 23.87x, which suggests the stock screens at a discount to selected peers. The main assumption is that forward earnings normalize as expected; the greatest limitation is comparability across software-infrastructure peers with very different growth and margin profiles.

Key Inputs

Input Value Role in Valuation

Free Cash Flow (TTM) \$-23.69 billion Company-wide trailing-twelve-month cash after normal operations and capital spending; this canonical period and scope are used consistently across the report.

Key Inputs (continued...)

Current market price	USD 139.17 per share	Reference point for comparing intrinsic value to trading price.
Supplied EPS-method intrinsic value	USD 194.92 per share	Primary output of the supplied EPS-based valuation.
Trailing EPS	USD 5.83 per share	Historical earnings base used in the trailing earnings multiple.
Forward EPS	USD 10.89 per share	Forward earnings base that supports a lower forward P/E than trailing P/E.
Trailing P/E	23.87x	Indicates the market price relative to trailing earnings.
Forward P/E	12.78x	Indicates the market price relative to expected earnings.
Peer count	5 companies	Exact number of selected comparable companies used in the validated peer set.
Peer median trailing P/E	33.43x	Benchmark multiple for relative valuation.
Peer P25/P75 trailing P/E range	26.79x to 35.87x	Shows dispersion in comparable-company valuation multiples.
Peer trimmed mean trailing P/E	30.63x	Secondary benchmark for relative valuation.
Peer validation reason	Validated 3 positive observations from IBM, DELL, CSCO; median=33.43x, P25=26.79x, P75=35.87x.	Confirms the peer multiple is based on a validated subset.

Peer source Yahoo Finance exact-industry domain and screener, FINVIZ, EODHD fallback, and Yahoo Finance reported statements. Source basis for the peer comparison set and multiple validation.

Methodology

The EPS method capitalizes earnings per share with an earnings multiple, using trailing EPS for reported current profitability and forward EPS for expected normalized earnings. For Oracle, the peer-multiple check compares the stock's trailing P/E with the validated peer-median trailing P/E of 33.43x, while the supplied intrinsic value of USD 194.92 remains the fixed EPS-method fair value.

Fair Value Interpretation

The supplied intrinsic value of USD 194.92 implies upside versus the current market price of USD 139.17, which is consistent with an undervalued screen on this method alone. The relative-valuation check is less supportive of that conclusion because Oracle's trailing P/E of 23.87x is below the peer median of 33.43x, suggesting a discount to selected comparables rather than a direct fair-value confirmation.

Risks and Limitations

- The valuation depends on forward EPS normalizing as expected, and any shortfall would reduce the implied fair value materially.
- The comparable set is limited to five selected peers, and the peer median can be distorted by different business mixes, capital intensity, and growth rates.
- Oracle's current price reflects market sentiment, while the EPS method does not fully capture balance-sheet leverage, free-cash-flow volatility, or nonrecurring earnings effects.

What Would Change the View

- A sustained increase in forward EPS or a higher earnings-growth trend would materially raise fair value.
- A material re-rating toward the peer-median trailing P/E of 33.43x would raise the implied value per share.

What Would Change the View (continued...)

- A downgrade in earnings outlook, margin compression, or a lower normalized P/E assumption would materially lower fair value.

Intrinsic Fair Value EPS Method: 194.92

Sources

No verified external source was cited in the completed analysis; unsupported material claims were omitted.

Investment Thesis - (ORCL) Oracle Corporation

Decision Takeaway

Oracle's thesis is Mixed, leaning Favorable on valuation and earnings quality. The strongest reason to own it is that the stock trades at 23.87x trailing earnings and 12.78x forward earnings, both below the selected peer median trailing P/E of 33.43x and below the Technology sector median of 44.38x. The greatest reason for caution is leverage and cash conversion pressure, with debt-to-equity at 3.67x and free cash flow at negative USD 23.69 billion on a TTM basis.

Bull Case

- Oracle's forward P/E of 12.78x implies the market is discounting substantial earnings growth, especially versus the selected peer median forward multiple that is materially higher for comparable technology names.
- Oracle's profitability remains strong, with a TTM profit margin of 25.37%, operating margin of 33.32%, and return on equity of 54.28%, which support earnings durability.
- Oracle's PEG ratio of 0.73x suggests the shares may not fully reflect expected growth, particularly if revenue and earnings momentum continues at the latest fiscal-year rates of 11.60% and 15.67%, respectively.

Bear Case

- Free cash flow is negative USD 23.69 billion on a TTM basis.
- Debt-to-equity of 3.67x leaves the equity more exposed to financing and refinancing sensitivity than lower-leverage peers.
- Oracle's trailing P/E of 23.87x is cheaper than the peer set, but it is still above IBM's 20.16x and can compress quickly if growth or margins disappoint.

Key Catalysts

- Continued cloud infrastructure and software demand could support another year of double-digit revenue and earnings growth, which would likely reinforce the current forward multiple over the next 12 months.
- Margin stabilization or improvement would help translate operating profit into better cash conversion, which could narrow the valuation gap with higher-quality software peers over the next several quarters.
- Any sustained reduction in negative free cash flow would likely improve investor confidence and support multiple expansion, especially as fiscal 2026 results are reported.

Principal Risks

- Persistent negative free cash flow could pressure valuation and raise questions about the quality of earnings, which may cap the stock's multiple despite solid reported profitability.
- High leverage could constrain financial flexibility if growth slows or interest costs remain elevated, which would weigh on earnings and equity valuation.
- If the market begins to value Oracle more like mature infrastructure peers than a growth software platform, the current premium to IBM's trailing P/E could narrow and reduce upside.

What Would Change the View

- A sustained move from negative free cash flow to positive free cash flow on a TTM basis would strengthen the thesis materially by improving capital efficiency.
- A visible decline in debt-to-equity from 3.67x toward a materially lower level would reduce balance-sheet risk and strengthen the downside case.
- If trailing and forward P/E both rerate materially above peer medians without corresponding acceleration in revenue or earnings growth, the thesis would weaken because valuation would no longer be supported by fundamentals.

Overall Thesis

Oracle screens as a profitable, high-ROE software company trading below key peer and sector earnings multiples, with the market assigning limited value to forward growth. The case is balanced by negative TTM free cash flow and elevated leverage, which temper confidence in the durability of cash generation. The investment case remains constructive only if growth and cash conversion continue to improve.

Source References: [1], [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14], [15], [16], [17]

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SWOT Analysis - (ORCL) Oracle Corporation

SWOT Matrix

Strengths

- Oracle posted \$67.36 billion of TTM revenue, \$17.09 billion of TTM net income, and a 25.37% profit margin, showing durable earnings power at scale.
- Oracle generated a 33.32% TTM operating margin and a 54.28% TTM return on equity, indicating efficient conversion of revenue into shareholder returns.
- Oracle's trailing P/E of 23.87x is below the validated peer median of 33.43x.
- Oracle's forward P/E of 12.78x and PEG ratio of 0.73x suggest the market is pricing in growth at a materially lower multiple than current earnings quality would imply.

Weaknesses

- Oracle's debt-to-equity ratio is 3.67x, which leaves less financial flexibility than lower-leverage software peers.
- Oracle reported negative TTM free cash flow of \$23.69 billion, creating a cash-conversion weakness despite positive operating cash flow of \$31.98 billion.
- Oracle's beta of 1.71x indicates materially higher share-price volatility than a lower-beta enterprise software name.
- Oracle's TTM revenue growth of 11.60% trails the pace implied by faster-growing infrastructure software peers, limiting relative growth appeal.

Opportunities

- Oracle can re-rate toward the sector's higher valuation band if it sustains margin strength while improving confidence in cash generation.
- Oracle can narrow the gap between operating cash flow and free cash flow by improving capital efficiency and reducing cash-intensive investment.
- Oracle can expand its cloud and infrastructure mix to support revenue growth above the latest 11.60% pace without sacrificing profitability.
- Oracle can use its below-peer trailing P/E to repurchase shares or fund selective investment while preserving earnings-per-share momentum.

Threats

- Oracle faces valuation competition from faster-growing infrastructure software peers that command much higher multiples despite lower current profitability.
- Oracle faces execution risk if heavy investment continues to suppress free cash flow and keeps leverage elevated.
- Oracle faces competitive pressure from large technology peers with stronger balance sheets and, in some cases, faster top-line growth.
- Oracle faces market-risk sensitivity because a 1.71x beta can amplify downside during technology-sector de-risking.

Decision Takeaway

The greatest decision impact sits in the strengths-versus-weaknesses tradeoff, because Oracle combines strong profitability and a discounted peer valuation with materially higher leverage and negative trailing free cash flow. That mix makes execution on cash conversion more important than near-term revenue growth alone. The opportunity set is attractive, but the balance sheet and cash-flow profile are the key swing factors.

What Would Change the View

- Sustained positive free cash flow after capital spending would materially reduce the balance-sheet and liquidity concerns.
- A meaningful increase in revenue growth without margin compression would strengthen the investment case and reduce dependence on valuation support.
- A sharp rise in leverage, a margin reset, or a sustained valuation premium to selected peers would materially weaken the current SWOT balance.

Source References: [1], [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14], [15], [16], [17]

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MOAT Analysis - (ORCL) Oracle Corporation

Decision Takeaway

Oracle's overall moat is Moderate, with Medium durability. The strongest moat source is its large installed base plus switching costs in enterprise databases and applications, while the greatest erosion risk is cloud-native substitution by rivals and migration pressure away from legacy workloads.

Moat Sources

1. Moat Source: Installed base and switching costs in enterprise software.

Strength: Strong.

Durability: High.

Supporting Evidence: Oracle generated \$67.36 billion in trailing-twelve-month revenue, \$17.09 billion in trailing-twelve-month net income, and a 54.28% return on equity using the provided equity basis, which is consistent with a large recurring enterprise footprint and economic leverage from incumbency. The company also showed 11.60% latest fiscal-year revenue growth and 15.67% latest fiscal-year earnings growth, indicating that the base is still monetizing rather than merely harvesting legacy revenue.

Main Threat: Customer migration to cloud-native architectures can reduce renewal pricing power and lower the value of legacy lock-in over time.

2. Moat Source: Scale and product breadth in enterprise infrastructure.

Strength: Moderate.

Durability: Medium.

Supporting Evidence: Oracle's TTM operating margin was 33.32%. The company's valuation profile also implies the market recognizes durable cash generation potential, with a trailing P/E of 23.87x and a forward P/E of 12.78x, but those figures are context rather than moat proof.

Main Threat: Larger platform competitors can bundle infrastructure, AI, and productivity layers together, limiting Oracle's ability to defend every workload category.

Moat Sources (continued...)

3. Moat Source: Brand credibility with large enterprises and regulated customers.

Strength: Moderate.

Durability: Medium.

Supporting Evidence: Oracle's 33.67x selected-peer trailing P/E context is not itself evidence of a moat, but the company's long operating history and high profitability indicate continued acceptance in demanding enterprise accounts. A 25.37% profit margin suggests Oracle still converts revenue into substantial residual earnings, which is easier for trusted enterprise vendors than for commodity providers.

Main Threat: Brand strength can be slow to erode, but a single major architecture shift can relegate a trusted incumbent to a lower-value maintenance role.

4. Moat Source: Financial resilience to invest through cycles.

Strength: Moderate.

Durability: Medium.

Supporting Evidence: Oracle produced \$31.98 billion in operating cash flow TTM. That financial capacity can support product development, cloud infrastructure, and customer retention efforts that reinforce the moat.

Main Threat: The reported TTM free cash flow was negative at \$23.69 billion.

Evidence Against a Moat

- Oracle's TTM free cash flow was negative at \$23.69 billion.
- The debt-to-equity ratio was 3.67x, which reduces strategic flexibility and can weaken the moat if competitive investment needs.
- Oracle's beta of 1.71x signals that the equity can remain volatile even when the business is profitable, which is not typical of a deeply protected moat.

Risks and Limitations

- The peer-valuation set is useful for context, but it is not direct evidence of competitive advantage, and the closest valuation peers are only partial substitutes for Oracle's enterprise software mix.
- The data provided does not include segment-level backlog, contract renewal, or customer retention metrics, so the assessment must rely on broad profitability and cash-flow indicators rather than direct switching-cost measures.
- Industry structure remains highly competitive, with large cloud, infrastructure, and software vendors capable of bundling adjacent products and compressing Oracle's pricing power over time.

What Would Change the View

- A sustained increase in reported free cash flow to positive levels, paired with continuing double-digit revenue growth, would strengthen the view that Oracle's installed base is compounding rather than being monetized defensively.
- Demonstrated multi-year retention of high operating margin near or above 33.32% while revenue expands would strengthen confidence that switching costs and scale remain durable.
- A material decline in revenue growth, a sustained fall in operating margin, or a sharp increase in churn-related disclosures would weaken the moat view and suggest erosion in customer lock-in.

Overall Moat Assessment

Oracle appears to have a Moderate economic moat driven mainly by enterprise switching costs, scale, and entrenched customer relationships. The stock's valuation may look attractive relative to peers, but the moat conclusion rests on business economics, not on the current multiple.

Source References: [1], [2], [3], [4], [5], [6], [7], [8], [9], [10], [11], [12], [13], [14], [15], [16], [17]

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Conclusions - (ORCL) Oracle Corporation

Forecast Scenario Ranges (Primary View)

Horizon	Bear range	Base range	Bull range	Confidence
Current	\$139.17 - \$139.17	\$139.17 - \$139.17 (center \$139.17)	\$139.17 - \$139.17	Observed
30 days	\$104.72 - \$118.36	\$118.36 - \$145.64 (center \$132.00)	\$145.64 - \$159.28	Medium
60 days	\$89.35 - \$107.80	\$107.80 - \$144.70 (center \$126.25)	\$144.70 - \$163.15	Low
90 days	\$78.14 - \$99.92	\$99.92 - \$143.48 (center \$121.70)	\$143.48 - \$165.26	Low
180 days	\$58.27 - \$88.14	\$88.14 - \$147.86 (center \$118.00)	\$147.86 - \$177.73	Very Low
365 days	\$30.71 - \$70.36	\$70.36 - \$149.64 (center \$110.00)	\$149.64 - \$189.29	Very Low

Bear, base, and bull ranges are presentation zones derived from the existing 80% modeled uncertainty band. Exact center estimates remain available below as secondary references for continuity and deterministic calculations; none of the values is guaranteed.

Decision Takeaway

Model View: Moderately Bearish; Evidence Alignment: Mixed; Valuation Confidence: Medium

Near-term conditions are mixed. Oracle's strongest support is its below-peer and below-sector earnings valuation combined with strong profitability, which helps offset the weak DCF output and negative free cash flow. The greatest risk is that heavy capital spending and elevated leverage keep cash conversion under pressure.

Point Estimates (Secondary Reference)

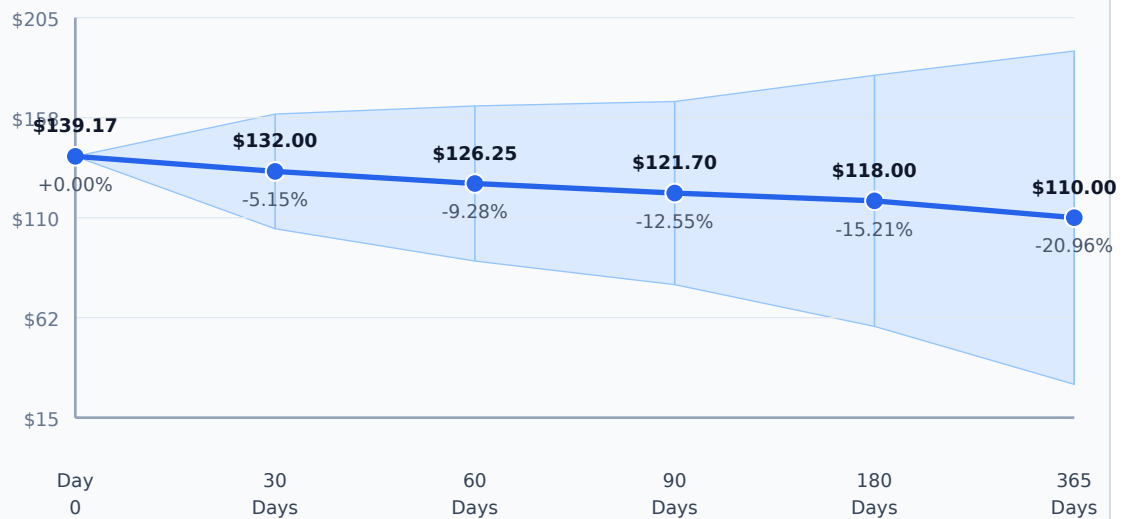
Line	Interval	Price	Growth Percentage
1	0 Days	139.17	0.00%
2	30 Days	132.00	-5.15%
3	60 Days	126.25	-9.28%
4	90 Days	121.70	-12.55%
5	180 Days	118.00	-15.21%
6	365 Days	110.00	-20.96%

These exact center estimates are retained as secondary references. Use the bear/base/bull ranges and confidence labels above as the primary decision view.

Forecast Price Path with 80% Uncertainty Band

Band uses historical-volatility scaling and is not a guarantee.

80% uncertainty band



Forecast Performance Scorecard

Forecast accuracy statistics are withheld until at least 100 forecasts have matured. 0 have matured and 100 more are required.

Metric	Value	Basis
Completed forecasts	0	Matured saved forecasts with an observed target-date close.
Minimum publication sample	100	Predefined threshold intended to reduce misleading small-sample claims.
Directional accuracy	Withheld	Published only after the minimum sample is reached.
Median absolute percentage error	Withheld	Published only after the minimum sample is reached.
80.00% uncertainty-band coverage	Withheld	Published only after the minimum sample is reached.

Forecast Rationale

1. 0 Days. The price is fixed at the immutable current level of 139.17, and the short-term setup is mixed with bearish MACD, price below the 200-day EMA, and only neutral RSI. The conservative anchor is the present market price.

2. 30 Days. The stock has shown sharp volatility and remains below longer-term trend measures, so a modest pullback toward nearby support is more plausible than a full trend reversal. Technical Analysis and the elevated beta argue for caution, while strong profitability limits a steeper decline.

3. 60 Days. The low end of the support band is more appropriate because momentum has not yet fully repaired, and the recent price history still shows repeated failure to hold gains. Financial Analysis remains constructive, but DCF and cash-flow strain cap confidence in a sustained rebound.

Forecast Rationale (continued...)

4. 90 Days. Near-term support levels and the possibility of stabilization justify only a partial recovery from the 60-day level. Newsworthy Events, Political Trades Over Last 30 Days, and Insider Trades Over Last 30 Days add little directional support, so the estimate stays conservative.

5. 180 Days. Longer duration depends more on earnings quality, leverage, dividend support, and valuation methodology than on recent technical bounces. Oracle's strong margins and dividend coverage help, but negative free cash flow and a weak deterministic DCF keep the price estimate near the lower end of plausible outcomes.

6. 365 Days. Over a full year, the conservative expectation is that valuation normalizes only partially because the market must weigh strong profitability against capital intensity, leverage, and competitive pressure. The estimate remains below the current price, but the dividend and earnings power should limit extreme downside.

Risks and Limitations

- Near-term price action can diverge sharply from fundamentals because ORCL's beta is high and the recent trading range has been unusually volatile.
- The technical picture conflicts, with short-term averages still supportive while longer-term momentum remains bearish, so trend signals can whipsaw.
- The model is sensitive to cash-flow and valuation assumptions, and any earnings surprise, guidance change, or large contract announcement could move the stock materially.

What Would Change the View

- A sustained improvement in free cash flow to positive territory, with operating cash flow staying above 30.00 billion USD annually, would materially raise the estimates.
- A confirmed breakout above the longer-term resistance zone, accompanied by stronger RSI and MACD momentum, would justify higher near-term price targets.
- A material increase in revenue growth, margin expansion, or analyst targets would raise the 180-day and 365-day estimates, while weaker growth or lower guidance would lower them.

Call Option Quality Screening - (ORCL) Oracle Corporation

Options Methodology

Each long-call scenario uses the option's actual expiration date, displayed ask, and stock forecast interpolated to expiration. Contracts must pass deterministic expiration, positive-bid, quote-freshness, volume, open-interest, implied-volatility, absolute-delta, bid-ask-spread, and positive modeled-return standards. A long call benefits from a share price above strike plus premium at expiration; ranking is quality-adjusted rather than based on raw profit.

Decision Takeaway

No call contract met the required liquidity, quote-quality, expiration, delta, volatility, and positive modeled-return standards.

Call Option Screening Result

No supported call option scenario passed the deterministic quality policy.

Risks and Limitations

- The modeled expiration stock price is uncertain and may fall outside the displayed range.
- Risk-neutral probability is derived from option-pricing inputs and is not a real-world forecast probability.
- Bid-ask spreads, changing implied volatility, early exercise considerations, taxes, commissions, and execution timing can materially change realized results.

Source References: [1]

Sources

1. [Yahoo Finance call option chain for ORCL](#) | Retrieved 2026-08-03 | [Open source](#)

Top 5 Illustrative Put Option Scenarios - (ORCL) Oracle Corporation

Options Methodology

Each long-put scenario uses the option's actual expiration date, displayed ask, and stock forecast interpolated to expiration. Contracts must pass deterministic expiration, positive-bid, quote-freshness, volume, open-interest, implied-volatility, absolute-delta, bid-ask-spread, and positive modeled-return standards. A long put benefits from a share price below strike minus premium at expiration and may be used for bearish exposure or portfolio protection; this report evaluates the put as a standalone purchased contract, not as personalized hedging advice.

Decision Takeaway

The highest quality-adjusted supported put scenario is ORCL270115P00160000, with a modeled expiration profit of \$408.33 per contract when the base stock scenario finishes below the contract's breakeven. This is a scenario calculation, not a prediction, recommendation, or guarantee.

Put Option Screening Result

1. Official Contract Symbol: ORCL270115P00160000.
Option Type: Long Put
Expiration Date: 2027-01-15
Days to Expiration: 165
Last Trade Date: 2026-08-03T14:36:57+00:00
Quote Age: 0.10 days
Current Stock Price Per Share: \$139.17
Strike Price Per Share: \$160.00
Moneyness at Report Price: In the money
Bid Per Share: \$36.70
Ask Per Share: \$37.30
Bid-Ask Midpoint Per Share: \$37.00
Premium Used Per Share: \$37.30
Premium as Percentage of Stock Price: 26.80%
Breakeven at Expiration Per Share: \$122.70
Breakeven Move From Current Stock Price: -11.83%
Forecast Price at Expiration Per Share: \$118.62
Forecast 80.00% Range at Expiration: \$61.58 to \$175.65.
Modeled Profit/Loss Per Contract at Expiration: \$408.33
Modeled 80.00% Outcome Range Per Contract: \$-3,730.00 to \$6,111.77.
Maximum Loss Per Contract: \$3,730.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$12,270.00.
Return on Premium in Base Scenario: 10.95%
Volume: 11
Open Interest: 7,387
Implied Volatility: 63.63%
Delta: -0.53
Risk-Neutral Probability Below Breakeven: 44.83%
Bid-Ask Spread: 1.62%
Quality Score: 0.69
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

2. Official Contract Symbol: ORCL270115P00150000.
Option Type: Long Put
Expiration Date: 2027-01-15
Days to Expiration: 165
Last Trade Date: 2026-08-03T16:35:45+00:00
Quote Age: 0.02 days
Current Stock Price Per Share: \$139.17
Strike Price Per Share: \$150.00
Moneyness at Report Price: In the money
Bid Per Share: \$30.55
Ask Per Share: \$30.95
Bid-Ask Midpoint Per Share: \$30.75
Premium Used Per Share: \$30.95
Premium as Percentage of Stock Price: 22.24%
Breakeven at Expiration Per Share: \$119.05
Breakeven Move From Current Stock Price: -14.46%
Forecast Price at Expiration Per Share: \$118.62
Forecast 80.00% Range at Expiration: \$61.58 to \$175.65.
Modeled Profit/Loss Per Contract at Expiration: \$43.33
Modeled 80.00% Outcome Range Per Contract: \$-3,095.00 to \$5,746.77.
Maximum Loss Per Contract: \$3,095.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$11,905.00.
Return on Premium in Base Scenario: 1.40%
Volume: 69
Open Interest: 12,401
Implied Volatility: 65.03%
Delta: -0.46
Risk-Neutral Probability Below Breakeven: 42.59%
Bid-Ask Spread: 1.30%
Quality Score: 0.68
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

3. Official Contract Symbol: ORCL261218P00150000.
Option Type: Long Put
Expiration Date: 2026-12-18
Days to Expiration: 137
Last Trade Date: 2026-08-03T16:39:40+00:00
Quote Age: 0.02 days
Current Stock Price Per Share: \$139.17
Strike Price Per Share: \$150.00
Moneyness at Report Price: In the money
Bid Per Share: \$28.50
Ask Per Share: \$29.75
Bid-Ask Midpoint Per Share: \$29.12
Premium Used Per Share: \$29.75
Premium as Percentage of Stock Price: 21.38%
Breakeven at Expiration Per Share: \$120.25
Breakeven Move From Current Stock Price: -13.59%
Forecast Price at Expiration Per Share: \$119.77
Forecast 80.00% Range at Expiration: \$67.76 to \$171.77.
Modeled Profit/Loss Per Contract at Expiration: \$48.22
Modeled 80.00% Outcome Range Per Contract: \$-2,975.00 to \$5,248.59.
Maximum Loss Per Contract: \$2,975.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$12,025.00.
Return on Premium in Base Scenario: 1.62%
Volume: 10
Open Interest: 6,903
Implied Volatility: 66.57%
Delta: -0.47
Risk-Neutral Probability Below Breakeven: 42.17%
Bid-Ask Spread: 4.29%
Quality Score: 0.65
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

4. Official Contract Symbol: ORCL260918P00155000.
Option Type: Long Put
Expiration Date: 2026-09-18
Days to Expiration: 46
Last Trade Date: 2026-08-03T16:40:24+00:00
Quote Age: 0.02 days
Current Stock Price Per Share: \$139.17
Strike Price Per Share: \$155.00
Moneyness at Report Price: In the money
Bid Per Share: \$24.00
Ask Per Share: \$24.35
Bid-Ask Midpoint Per Share: \$24.18
Premium Used Per Share: \$24.35
Premium as Percentage of Stock Price: 17.50%
Breakeven at Expiration Per Share: \$130.65
Breakeven Move From Current Stock Price: -6.12%
Forecast Price at Expiration Per Share: \$128.93
Forecast 80.00% Range at Expiration: \$96.53 to \$161.34.
Modeled Profit/Loss Per Contract at Expiration: \$171.67
Modeled 80.00% Outcome Range Per Contract: \$-2,435.00 to \$3,412.39.
Maximum Loss Per Contract: \$2,435.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$13,065.00.
Return on Premium in Base Scenario: 7.05%
Volume: 84
Open Interest: 4,573
Implied Volatility: 72.02%
Delta: -0.61
Risk-Neutral Probability Below Breakeven: 44.34%
Bid-Ask Spread: 1.45%
Quality Score: 0.63
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Put Option Screening Result (continued...)

5. Official Contract Symbol: ORCL270115P00155000.
Option Type: Long Put
Expiration Date: 2027-01-15
Days to Expiration: 165
Last Trade Date: 2026-08-03T16:20:19+00:00
Quote Age: 0.03 days
Current Stock Price Per Share: \$139.17
Strike Price Per Share: \$155.00
Moneyness at Report Price: In the money
Bid Per Share: \$33.75
Ask Per Share: \$34.15
Bid-Ask Midpoint Per Share: \$33.95
Premium Used Per Share: \$34.15
Premium as Percentage of Stock Price: 24.54%
Breakeven at Expiration Per Share: \$120.85
Breakeven Move From Current Stock Price: -13.16%
Forecast Price at Expiration Per Share: \$118.62
Forecast 80.00% Range at Expiration: \$61.58 to \$175.65.
Modeled Profit/Loss Per Contract at Expiration: \$223.33
Modeled 80.00% Outcome Range Per Contract: \$-3,415.00 to \$5,926.77.
Maximum Loss Per Contract: \$3,415.00
Maximum Theoretical Gain Per Contract if the Stock Falls to Zero: \$12,085.00.
Return on Premium in Base Scenario: 6.54%
Volume: 233
Open Interest: 2,969
Implied Volatility: 64.71%
Delta: -0.49
Risk-Neutral Probability Below Breakeven: 43.82%
Bid-Ask Spread: 1.18%
Quality Score: 0.63
Liquidity Assessment: Good
Risk Note: The forecast can be wrong, time decay and implied volatility can reduce the contract's value, and the entire premium may be lost if the stock does not finish sufficiently below the strike at expiration.

Risks and Limitations

- A purchased put can lose the entire premium through time decay or an unfavorable stock path even when the longer-term investment thesis is bearish.
- Risk-neutral probability is derived from option-pricing inputs and is not a real-world forecast probability or an estimate of personal portfolio protection.
- Bid-ask spreads, changing implied volatility, early exercise considerations, taxes, commissions, contract deliverables, and execution timing can materially change realized results.

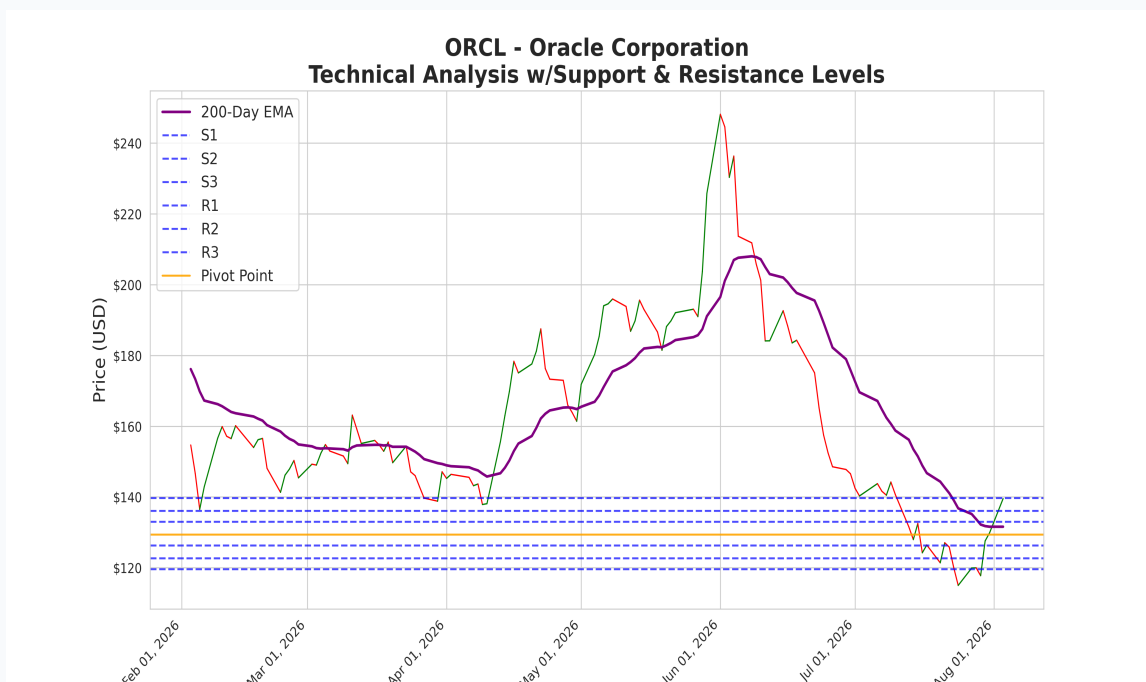
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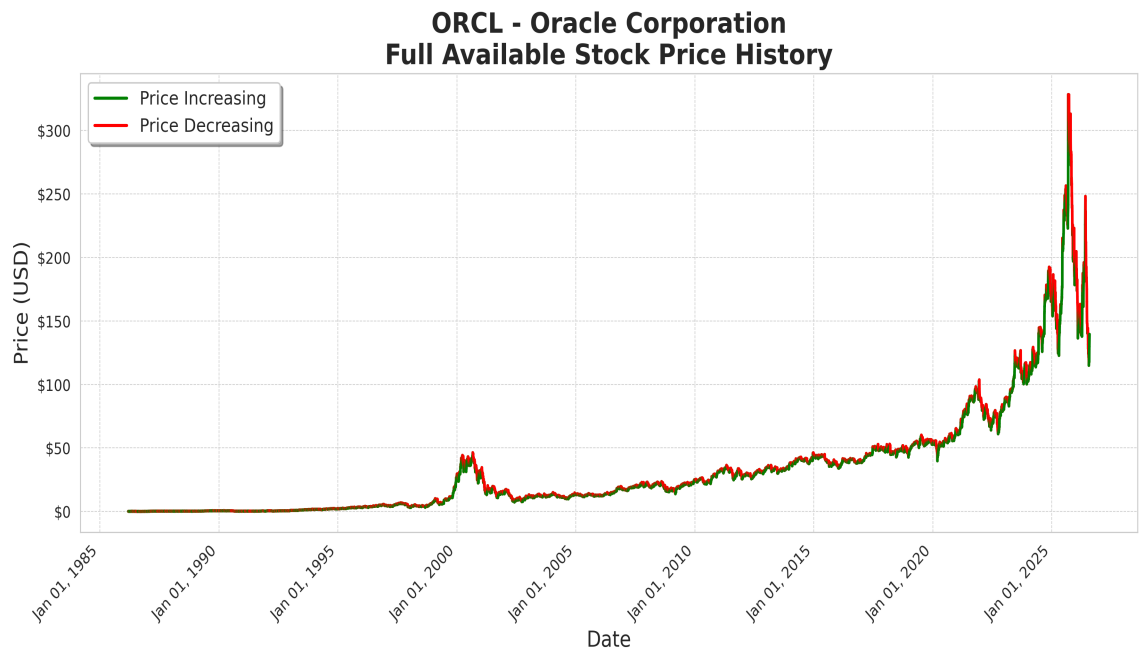
Appendix - Charts & Graphs

Six-Month Technical Trend, 200-Day EMA, Support, Resistance, and Pivot



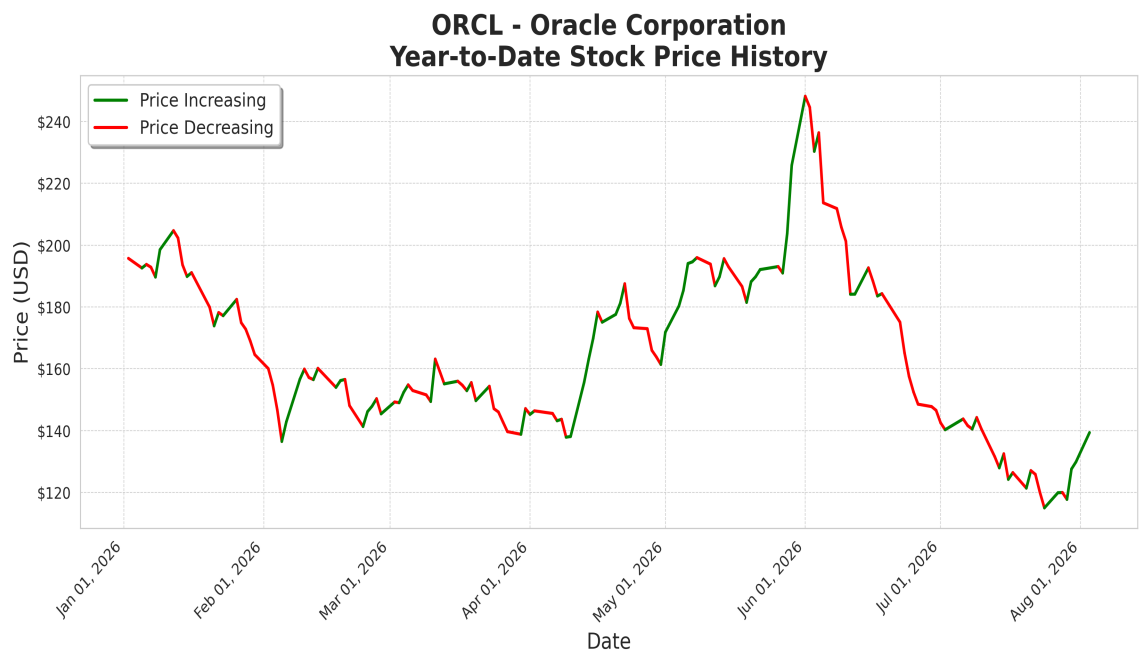
Timeframe: 6 months; interval: daily. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: shows current trend relative to the long-term EMA and deterministic support/resistance levels.

Full Available Stock Price History



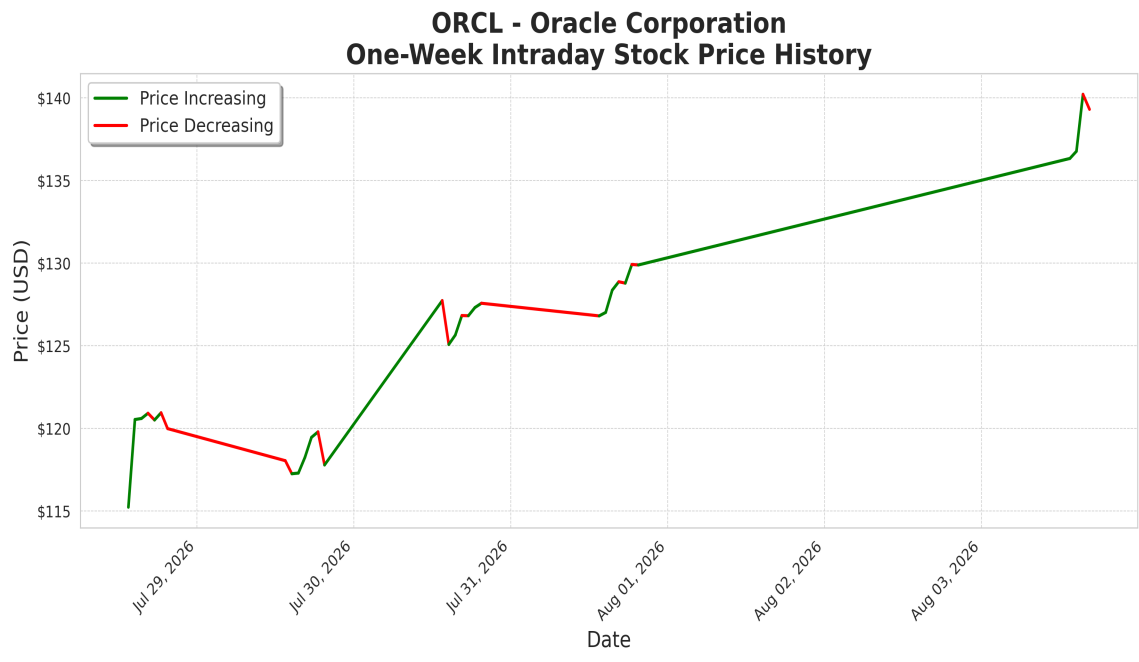
Timeframe: Full available history; daily interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Places the current valuation in the security's complete trading-history context.

Year-to-Date Stock Price History



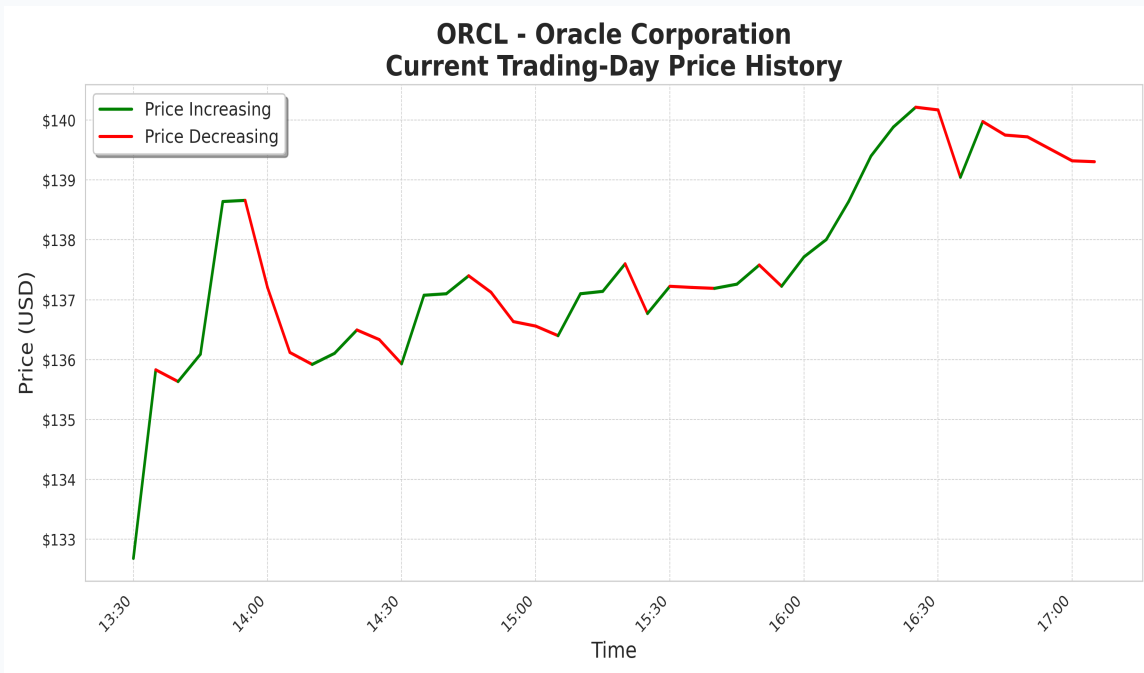
Timeframe: Year to date; daily interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Shows the current-year trend and major reversals.

One-Week Intraday Stock Price History



Timeframe: Latest 5 trading days; hourly interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Shows short-term momentum and recent volatility.

Current Trading-Day Price History



Timeframe: Latest trading day; 5-minute interval. Source: Yahoo Finance market data retrieved 2026-08-03. Interpretation: Shows intraday direction and price variability.

Important Disclosures and Limitations

Report Validation

Validation Summary Field	Value
Validation Status	Passed with informational limitations
Validation Checks Performed	156
Failed Validation Checks	0
Review-Level Validation Checks	3

Some non-critical claims or supplemental data were omitted when their dates, citations, or source quality could not be verified. Core deterministic calculations and reconciliations completed successfully.

The table below summarizes each material failure or review-level limitation in customer-facing language. Detailed diagnostics remain in the application logs.

Validation Check	Result	Severity	Explanation
Valuation-method consistency	Review	Warning	Supported valuation methods differ materially in magnitude or direction. The report presents each method separately and moderates the overall confidence instead of averaging unlike estimates.
Independent cross-check - Dividend Yield	Review	Warning	The provider value for Dividend Yield did not reconcile to the statement-derived calculation on an equivalent period and basis. The independently calculated value remains authoritative in the report.
Independent cross-check - Operating Margin	Review	Warning	The provider value for Operating Margin did not reconcile to the statement-derived calculation on an equivalent period and basis. The independently calculated value remains authoritative in the report.

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