

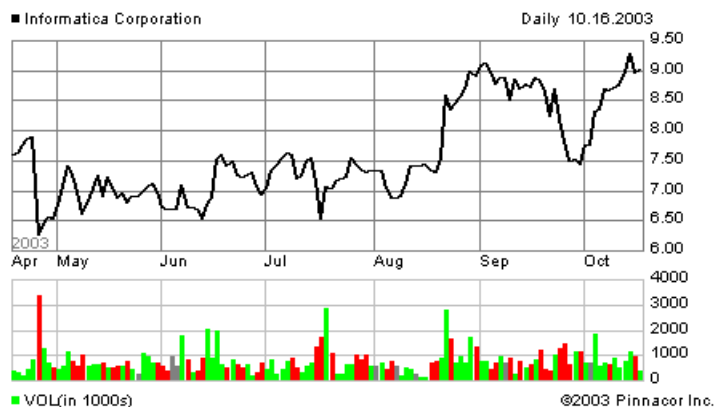
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Long-Term Report **October 16, 2003**

Update – Strong Buy Informatica Corp. (NASD) INFA \$9.02

Company Data

52-Week Range	\$2.83-\$9.12
Market Cap	\$727.65M
Shares Outstanding	80.4M
Book Value	\$3.10
Price/Book	2.89
Average Daily Vol.	837.6K
Target Price	\$13.00
Target Percentage	44%



Informatica Corp. is a leading provider of business analytic software that enables its customers to automate the integration, analysis and delivery of critical corporate information.

We are recommending Informatica Corp. for the following reasons:

- The continuing growth of corporate databases coupled with the need to effectively access and manipulate the information augurs very well for **Informatica's** products. Recently, Informatica was awarded two significant contracts from Pennsylvania Dept. of Health and the State of Wisconsin. Additionally customers of **Informatica** include **Daimler Chrysler, Citicorp, and Wal-Mart.**
- **From a financial viewpoint, the company is especially well positioned.** Currently, **Informatica** has over **\$230 million in cash** (about \$3.10 per share) and the company has **no debt.**
- For the first six months of 2003, the company has earned \$.06 per share, which was **twice** as good as expectations. For the September 2003 quarter we expect earnings of \$.04-\$.05 per share.
- While the stock of **Informatica** has risen **30%** since our May 27th recommendation (at \$6.91 per share) we continue to recommend this well-run software company.
- **We are raising our target price from \$10.00 per share to \$13.00 per share.**

“INVESTMENT RESULTS SHOULD BE EVALUATED IN YEARS, NOT JUST IN A FEW WEEKS “