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Industry Outlook

Tibco Looks Down at Nasdaq From 'Cloud'

By Gregg Greenberg   07/28/10 - 07:30 AM EDT [Add Comment](#)

Stock quotes in this article: [TIBX](#) [IBM](#) [ORCL](#)

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NEW YORK ([TheStreet](#)) -- Shares of enterprise-software provider **Tibco** ([TIBX](#)) have returned more than four times the **Nasdaq** over the past year, and Chief Executive Officer Vivek Ranadive expects continued outperformance despite a sluggish economy.

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Ranadive sat down with *TheStreet* to talk about his company's recent success and what we can expect from Tibco in the second half of this year.

What's driving Tibco's stock?

Ranadive: It's largely performance. For eight consecutive quarters, we have beaten consensus. We had a 30%-plus increase in earnings per share over the past year, and in just the most recent quarter. And there's a general belief that event-driven software has now reached the proverbial tipping point. So even though the stock has outperformed, we believe the best days are still ahead for the company.

Which sectors are ordering the most right now?

Ranadive: Our historical success has been in financial services and telco. But one of the reasons I say we've reached the proverbial tipping point is because we're now starting to see success in a variety of sectors. So we're seeing it in retail. We're seeing it in health care. We're seeing it in government. We're seeing it in airlines. We're seeing every geography and every sector embracing this move to event-driven technology that Tibco stands for.

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What is Tibco doing in the "cloud" right now?

Ranadive: Tibco is providing the middleware so people can put their infrastructure and their applications in the cloud. What Levi Strauss did during the gold rush is provide jeans so people could get gold. We're doing that for the cloud -- we're providing the tools and the infrastructure so people can leverage cloud solutions.

We keep hearing that American and European spending are down as economies are slowing. How are you doing in these regions, as well as the emerging markets, where growth is faster?

Ranadive: We have actually done very well in the U.S., and we've done extremely well in Europe. So from our perspective, those have been good markets for us. But we are actually seeing great opportunities in the emerging markets. Brazil is one of our fastest-growing markets, as is India. We've seen great success in China. So we're investing heavily in all those markets, and we're tasting success there.

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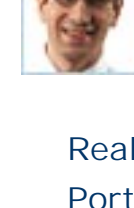
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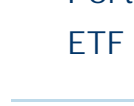
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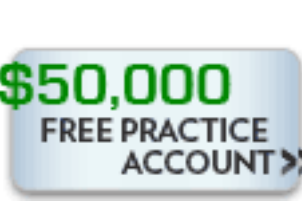
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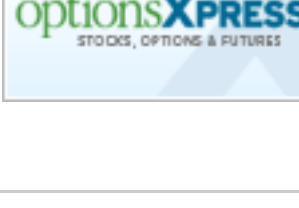
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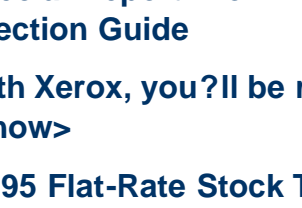
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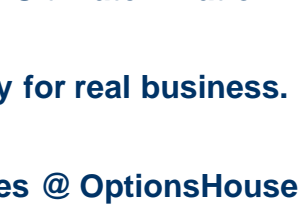












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