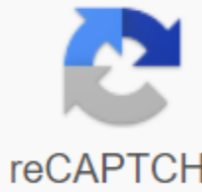


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September 25, 2009 12:01am ET Order Reprints Print Articles McAfee (MFE: NYSE) by FBR Capital Markets (\$41.42, September 25, 2009) In LIGHT our strong on-site audits, we upgrade McAfee's stock (ticker: MFE) from Market Run to outperform, while raising our estimates and target price from \$41 to \$50 (19 times our fiscal 2010 earnings per share estimate). Over the past few weeks, we have picked up additional data points from the site, leading us to believe that the transaction flow was stronger than expected for McAfee during the September quarter and thus should translate into better-than-expected order numbers heading into the fourth quarter of 2010. While we continue to pick up some pockets of weakness across the channel as macro conditions remain soft, we have been impressed by McAfee's performance acumen in this area, especially on large deals that appear to be improving consistently and should be good car growth as the company continues to cross-sell its enterprise security suite into an underpenetrated established base. The integration headaches around the acquisition of Secure Computing (2008) were our initial concern, but we have become progressively more comfortable with the growth/synergies potential based on feedback from the channel, as we believe that McAfee is well placed to benefit from its extensive federal reseller network and get a big chunk of the cybersecurity growth pie over the coming quarters/years. We believe that McAfee is very well positioned to benefit from larger deployments/security updates over the next 12-18 months on the heels of an expanding set of products and an improved information technology spending environment, which should lead to a significant increase in the share. While some investors have been concerned about the upcoming original Equipment Manufacturing (OEM) extension agreement with Dell (DELL) in the coming months, we believe the bark will be worse than a bite as we do not expect this deal to significantly change McAfee's consumer growth/cash flow story for the second half of 2009/2010. Given our positive field audits of McAfee, coupled with the recent acquisition of MX Logic, we are increasing our fiscal third quarter 2009 (end of September) revenue and pro-forma EPS estimates to \$490.2 million and 61 cents from \$484.7 million and 60 cents. In fiscal year 2009, we increase our EPS revenues and forecasts to \$1.92 billion and \$2.40, respectively, from \$1.90 billion and \$2.39. In fiscal year 2010, we increased our estimates to \$2.13 billion and \$2.68, respectively, from \$2.08 billion and \$2.64. Based on our recent audits, we believe that McAfee sees better-than-expected strength on both government and corporate fronts, as a combination of a strong product cycle, a robust and healthy cybersecurity spending benefits companies on the ground. In our opinion, the fruits of the fruit McAfee's (product cycle, sales focus) is really starting to show up at both the top and bottom line, which we believe should spur equities in the coming quarters amid improvements in IT spending. --Daniel H. Ives --Michael Bauer Companies mentioned in Hot Research are the subject of scientific reports recently released by investment firms. Their opinions do not reflect the views of Barron's Online or Dow Jones and Company, Inc. Stock prices at the time of publication of the report and the date of the report are in brackets. To be considered for this feature, please send materials to Research@barrons.com Comments? Email us atonline.editors@barrons.com In LIGHT our strong on-site checks, we upgrade McAfee's stock (ticker: MFE) from Market Run to outperform, while raising our estimates and target price from \$41 to \$50 (19 times our fiscal 2010 earnings per share estimate). The error occurred, please try again later. Thanks this article has been sent to a contest among internet companies to be the gatekeeper of the World Wide Web is getting heated these days. Everyone wants to emulate the overwhelming success of Yahoo! and America Online, whose websites are used by many internet surfers as a home information base for everything from stock quotes to horoscopes. And for good reason. So-called portals (sites that serve as a starting point for internet access and often the first page users see) generate more advertising revenue than other sites because of their heavy traffic. They are also a mecca for lucrative deals with information providers and companies that make e-commerce. Not to mention the investors. Excite, whose shares were trading around 15 last July, is now only sold on hair under 100 - a tidy gain of almost 600%. Even so-called second-tier players such as Infoseek and Lycos grew by about 600% last year. And Disney recently announced an investment in Infoseek fed the frenzy even more, as other media titans are expected to capture what has been compared to the latest available parts of California beachfront ownership. That's why Netscape Communications' ballyhooed entry into the lottery portal, which it noted on Tuesday, unveiling its newly revamped Netcenter site, was closely watched by competitors and investors. Because the fact is that while other online stocks have gone up, Netscape - one of the hottest initial public offerings ever - has been left in the cold. After trading around 50 last July, Netscape's shares are now hovering at 35 11/16, and that's even after they rose 8 5/8 - or nearly 30% - in a trading session on Wednesday on speculation that a media giant like Time Warner or Viacom would make an investment in the company or secure Netcenter. Even with great progress, Netscape shares are still about 30% off The 52-week high and about 60% of its all-time high is around 80 back in early 1996. But some stock fans say it may be exactly what the doctor ordered to inject some life into netscape promotions and help him catch up with high-flyers Excite, Lycos and Infoseek. This could be a resurgence for Netscape, argues analyst Rick Berry of Atlanta-based brokerage J.P. Turner. This could add tens of millions in revenue. In fact, Netscape has a unique ability to benefit from the portal business because of its dominance in internet browsers. The latest data from International Data Corp. shows that while Microsoft Internet Explorer has made significant strides in the browser business, Netscape still owns more than half of the market. And with the Justice Department breathing down Bill Gates' neck on this issue, Microsoft may no longer be able to use its monopoly operating system to dominate the browser market as well. This is important for Netscape because the company installs its own Netcenter site as the default homepage for its Communicator web browser. This means that users who access the internet through Netscape Communicator will automatically receive Netcenter on their computer screens. If Netcenter offers similar features to Yahoo! and, say, Lycos, why leave? (Excite will provide technology for Netscape's proprietary search engine on Netcenter.) Netscape's bare-bones website is already the third most popular online, with more than 20 million users a month - behind yahoo! and AOL alone, according to Atlanta-based research firm Relevant Knowledge. And that was even before the company made any effort to add portal-style features such as web directory and news headlines. Recognition of the Netscape brand can help the company become a major force in the portal's business, Berry said. This would mean more opportunities for e-commerce. In a recent ad outlining the company's internet strategy, CEO James Barksdale noted that Netcenter could open the door to a broader relationship with partners. . . . Netscape allows companies to create their own apps using our . . . infrastructure software, to purchase and deploy packaged e-commerce applications or to outsource their applications . . . our Netscape Netcenter website, he explained. The company has already established such a relationship with Citibank and Ford Motor. But Netscape needs to show Wall Street has more where those deals came from. It has not yet been proven how the business portal pulls in the proceeds of licensing revenue for the business, said analyst David Riederman of NationsBanc Montgomery Securities. Besides with Citibank, I would like to see evidence of other major trade deals. However, Readerman believes that the portal business itself is likely to be a boon to Netscape's stock. The cash flow it generates helps share price, he said. And this stock looks like it has room to move. While its multiple 4.5 times sales won't be cheap for the automaker, Netscape is trading at a huge discount to its peers online. Berry notes that Lycos trades about 21 times sales, Excite goes from hand to hand to nearly 19 times sales, and Yahoo! goes for a whopping 70 times revenue. (Many of these companies, like Netscape, have no revenue to speak of.) This means that if Netscape can use its audience in captivity to make its new portal site a big draw, its shares may well be the only deal left in one of the hottest sectors the market has seen in a while. Editor's note: Weekday Trader will not appear on the evening of Thursday, July 2. Barron will be published on Friday morning this week. To subscribe to the free mail delivery weekday Trader, barron's Online exclusive. Click here. A name synonymous with antivirus applications for decades, McAfee is one of the most popular software packages to protect your devices from malware and other unwanted programs or attacks. But it can be over-protected from time to time and block programs that you actually trust from performing your desired functions. In such cases, it's good to know how to temporarily disable McAfee protection. We'll show you how. These instructions apply to most versions of Microsoft Windows and macOS. [eriksvoboda/iStock/Getty Images Plus](#) Follow the instructions below to temporarily disable McAfee Total Protection on Windows PCs. Turning off antivirus or firewall can make your computer vulnerable to external attacks or infections. Don't forget to re-enable these protections as soon as you complete the task McAfee blocks. Click on the McAfee icon in the Windows Taskbar Notifications section at the bottom right corner of the screen. It looks like a red shield. When the pop-up menu appears, select Open McAfee Total Protection. You can also open the program with a desktop icon if it is, or by searching for it using the Windows Search Bar. Choose the PC Security tab. Tap the real-time scan found in the left panel menu. A real-time dialog pops up, overlaying the McAfee Total Protection dashboard. Click Off to disable active scanning. A confirmation message appears to ask if you're sure you want to disable the scan in real time. Click Off to continue. Can you re-enable the scan automatically at a later time, first selecting one of the specific time intervals provided in the drop-off menu under When you want to resume scanning in real time? To disable Firewall, repeat the steps above and select the firewall instead of scanning in real time in step 4. Take these steps to temporarily disable McAfee Total Protection on your Mac: Click on the McAfee Total Protection logo, represented by a red shield located in the upper right next to the Mac battery indicator and the Wi-Fi icon. If you don't see this icon, you can open McAfee by selecting a magnifying glass icon in the top right corner, entering McAfee, and then selecting the Internet Security option. Select Total Protection Console from the drop out of the menu. The McAfee Total Protection console should be displayed. Choose the Mac Security tab. Select a real-time scan located on the left menu. You should see real-time scanning options, and the Total Protection window overlay. Click on the Lock icon in the bottom left corner. Enter the macOS password on request and click OK to continue. Tap the On/Off switch, located in the top right corner of the scan dialogue in real time, so that it turns from blue (On) to gray (Off). Tap X in the top left corner to close the dialog window in real time. You've disabled the McAfee scan functionality in real time. Repeat the above steps for the McAfee firewall if you like by selecting a firewall in step 4. 4. mcafee web gateway product guide 7.8.2

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