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Cautious optimism - that's the message eBay (EBAY) - Gets Report sends to Wall Street. And the Street seems to love it. eBay reassured investors late Wednesday that it is capable of meeting the challenges that come its way and undercutting the message with better-than-expected third-quarter earnings. But it has held a sober tone about the future, provided lower guidance for the year and be clear that more work remains ahead for it to keep revenue and profit growth. Investors liked what they heard, pushing eBay's stock to \$1.82, or 6.4%, in past Thursday trading. The e-commerce giant reported earnings of \$281 million, or 20 cents a share, for the quarter ended Sept. 30. A year ago, eBay posted a profit of 18 cents per share. On a non-GAAP basis, eBay posted 26 cents a share in the quarter. Analysts surveyed by Thomson Financial were seeking a 16-cents-a-share gain on non-GAAP basis and a 24-cent gain on a GAAP basis. eBay also beat revenue forecasts, bringing in \$1.45 billion in the third quarter, to 31% on year and above the \$1.43 billion forecast. Even more importantly, eBay showed that its efforts to address some of the weaknesses that investors had worried were rooting. Its core auction-driven Marketplace slowed as some vendors shifted their stock over to eBay Stores, which is more likely to offer fixed prices that could be less attractive to eBay's bargain hunting audience. Last quarter, eBay tried to address this by collecting stock fees at its eBay Stores. It seems to be working. Speaking in the conference on Wednesday, eBay CEO Meg Whitman said she was cautiously optimistic the strategy was working. We're seeing fewer identical items at relatively uncompetitive prices, meaning the buyer experience is improving, Whitman said. What we're seeing is more buyers at higher conversion rates, albeit very early. The Street's response was a sense of encouragement. We estimate core U.S. listings accelerate in the third quarter, rising about 10% year on year, showing early signs that eBay's recent price moves could provide the desired rebalancing of inventory on its websites, wrote Marianne Wolk, an analyst at Susquehanna Financial who has no underwriting relationship with eBay. But eBay also lowered its 2007 revenue guidance, saying revenue would grow between 17% and 21% in the year. That was down significantly from the 25% growth the Street expected for next year. On the bottom line, we believe we can grow earnings per share by at least 20% versus 2006, said eBay CFO Bob Swan. Although Wall Street never likes to hear about lower guidance, analysts who had a conservative view of eBay's prospects took the news into stride. The risk profile on growth remains high, writes Jeetil Patel, an analyst at DeutscheBank, who maintained his holding rating on the stock. reduced outlook comes as no surprise given the slowing growth at the company, underperformance at Skype and buy frequency. DeutscheBank has no current underwriting relationship with eBay. SAN FRANCISCO (CBS.MW) - Some investors may feel eBay's shares are a little rich, given they hit another 52-week high on Friday. But not many companies can offer the type of growth eBay is ready to deliver. EBAY EBAY, -1.77% is on a run rate to offer more than \$21 billion worth of goods on its market this year, and that could more than double to \$40 billion by 2005, according to Goldman Sachs. That's a growth rate of about 39 percent annually over the next two years. Assuming a fee of 7.1 percent, down from 7.5 percent in 2002. eBay could generate \$2.9 billion in sales in 2005 at that \$40 billion. eBay's longstanding goal is to generate \$3 billion in sales in that year. See full story. Adding payment sales of PayPal, an online payment service, would drive revenue well beyond the \$3 billion mark to as much as \$3.8 billion in 2005, says Anthony Noto, Goldman's internet analyst. He also expects operating margins of 40 percent in 2005, up from 31 percent last year. Shares of eBay traded as high as \$100.02 on Friday before going at \$99.19, up \$1.11, or 1 percent. That level is still a 52-week closing high. While Noto's note is optimistic about eBay's prospects, he does indicate that the upside for the stock at current levels is about 5 percent to 15 percent over the next 18 months. This can be too little return for too much risk. Based on Noto's discount cash flow analysis, eBay's implied value is \$88. Ask: bake off Ask Jeeves' ASKJ UK property said it was replacing ESpotting with Google as its exclusive third-party provider of paid listings for its UK website. Asking Jeeves UK is the 11th most visited site in the country, with 6.6 million unique visitors. With the deal, Google claims it will reach 63 per cent of the online population in the UK. The bowl down under ESpotting, Google and Overture OVER, +2.40% for the Jeeves property helped Jeeves secure a higher income share, according to analysts. Youssef Squali, an analyst at First Albany, estimates that Jeeves is locked in a revenue split to the upside of 70 percent. Higher sales give Squali greater confidence that Jeeves will hit its 28-cent earnings estimate for fiscal 2003. Ask Jeeves rose nearly 9 percent to \$12 in Friday. At that level, it trades at more than 39 times Squali's estimate. It is important to note that the earnings estimate includes many charges and taxes. Richard Fetyko, an analyst at Kauman Bros., says Google's win against Overture in Europe could mark a shift in the power balance in the region. Asking Jeeves could mark a turning point in Europe in terms of a competitive landscape, Fetyko wrote. We believe that Google is likely to show up the heat in Europe. On speculation With Google flexing its muscles, some investors believe it's the only solution for the other players to err off the mighty search engine. Overture, the leading paid search company, she has catapulted as speculation swirled Friday that Yahoo YHOO could acquire the company. Helping to supplement that rumor was information in Yahoo's 10-Q, released Thursday, that Yahoo is gaining 19 percent of its revenue from Overture. When you see such a concentration of revenue from one source, the concept is that Yahoo should secure that revenue, said Scott Kessler, an analyst at S&amp;P. If you look at the performance of many of these names, you can say from a macro perspective, things turn up, but there's obviously a disconnect between relative performance in Yahoo inventory and Overture inventory. By the end, Overture had risen 17 percent to \$14.55 percent on volume of 17.1 million shares. Other search companies, such LookSmart.com THE APPEARANCE, FindWhat.com FWHT, have also gained ground. LookSmart.com traded as high as \$2.80, up 14 percent. By the end, LookSmart had risen 7 percent to \$2.62. FindWhat.com added 3 percent to \$11.77. InfoSpace INSP, -0.01% shares shot up 19 percent to \$14.27 Friday. A federal judge ruled that InfoSpace founder and former CEO Naveen Jain made illegal insider-stock trades while he was CEO of the internet directory company. It's about the rear standings I set up for my kids, Naveen Jain said in an interview with CBS. MarketWatch.com. Shares were split and accidentally placed in Jain's joint account with his wife, Jain says. The error was found and well corrected before this lawsuit was filed, but the Judge says that we bought the shares, Jain explained. But how can you buy something when no one sells it to you. The shares belong to the trust and the trustee must set by. InfoSpace could receive more than \$200 million in damages from Jain if InfoSpace loses the case, according to a published report. I don't know where that number came from, Jain says. InfoSpace would not comment. Note... Covad Communications COVD plunged 12 percent to \$1.03 after the wholesale DSL provider projected a second-quarter sales goal set under the consensus estimate set by Thomson First Call. See full story. RealNetworks RNWK, fell 1 per cent to \$7.92 after being tied up in the past two weeks. The stock is up about 60 percent since the start of the month following some positive announcements, including a deal to provide online games to Comcast Internet subscribers and the company's new mobile directory. eBay is a great resource if you're looking for things at a discount - with everyone competing to sell their tchotchkes and castoffs, you can often find things much cheaper on this online marketplace than in a brick-and-mortar store. The downside: The low price you see on many auction-only items is rarely the price you'll pay at the end of the auction if you win. Seasoned eBay bidders tend to wait until the last second to place their bids, leaving in the fabric novice bidders who thought they had spotted a once-in-a-lifetime deal. If you're sick of that disappointment, here are some tips that should help get on the winning side of more eBay match-ups. If you're too busy keeping up with auctions, a sniping service can submit your bid to eBay in the last few seconds of action. For example, at Auction Sniper you enter your maximum bid for an item, and it will provide input that closes 5 seconds before auction. Its worth submitting your absolute maximum bid with Auction Sniper, because eBay will set the price at only a small amount more than the next highest bidder. For example, if Auction Sniper offers \$100 on an item for you, but the next highest bidder bid \$95, you'll only pay \$96 for the item if you win. Unfortunately, if someone else submits a higher bid than your Auction Sniper max before the auction is over, they'll still win. Praying manually is always also a possibility. In the last 2 or 3 hours of an auction, check out bidding history to see if it includes any aggressive bidders who can drive up the price. If so, hunker down and think about the maximum price you'd bid - say, \$50. Then open two browser windows, both of which show the same auction. In one window, enter your maximum bid and click Place Pray, but don't click Continue. In the second window, see how the auction closes at the last 10 or 20 seconds. Then move back to the first window, click Continue and click Confirm Bid on the next page. Chances are, you'll beat your competitors. Note: When you buy something after clicking links in our articles, we can earn a small commission. Read our affiliate link policy for more details.

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