



FIRST QUARTER 2014 EARNINGS CALL SUPPLEMENTAL MATERIALS

May 1, 2014



Agenda

TOPIC	SPEAKER
First Quarter 2014 Highlights	Frank Martire, <i>Chairman and CEO</i>
Operations Review	Gary Norcross, <i>President and Chief Operating Officer</i>
Financial Summary	Woody Woodall, <i>Chief Financial Officer</i>

Forward-looking Statements

Our discussions today, including this presentation and any comments made by management, contain forward-looking statements within the meaning of the U.S. federal securities laws. Any statements that refer to future events or circumstances, including our future strategies or results, or that are not historical facts are forward-looking statements. Actual results could differ materially from those projected in forward-looking statements due to a variety of factors, including the risks and uncertainties set forth in our earnings press release dated May 1, 2014, our annual report on Form 10-K for 2013 and our other filings with the SEC. We undertake no obligation to update or revise any forward-looking statements.

Use of Non-GAAP Measures

Generally Accepted Accounting Principles (GAAP) is the term used to refer to the standard framework of guidelines for financial accounting. GAAP includes the standards, conventions, and rules accountants follow in recording and summarizing transactions and in the preparation of financial statements. In addition to reporting financial results in accordance with GAAP, the company has provided non-GAAP financial measures, which it believes are useful to help investors better understand its financial performance, competitive position and prospects for the future.

These non-GAAP measures include:

- Organic revenue
- Adjusted revenue
- Adjusted earnings before interest, taxes, depreciation and amortization (adjusted EBITDA)
- Adjusted EBITDA margin
- Adjusted net earnings
- Adjusted cash flow from operations
- Free cash flow

Any non-GAAP measures should be considered in context with the GAAP financial presentation and should not be considered in isolation or as a substitute for GAAP net earnings. Further, FIS' non-GAAP measures may be calculated differently from similarly titled measures of other companies. Additional information about these non-GAAP measures is provided in the appendix to this presentation. Reconciliations of these non-GAAP measures to related GAAP measures are provided in the Investor Relations section of the FIS Web site, www.fisglobal.com.

FIRST QUARTER 2014 HIGHLIGHTS

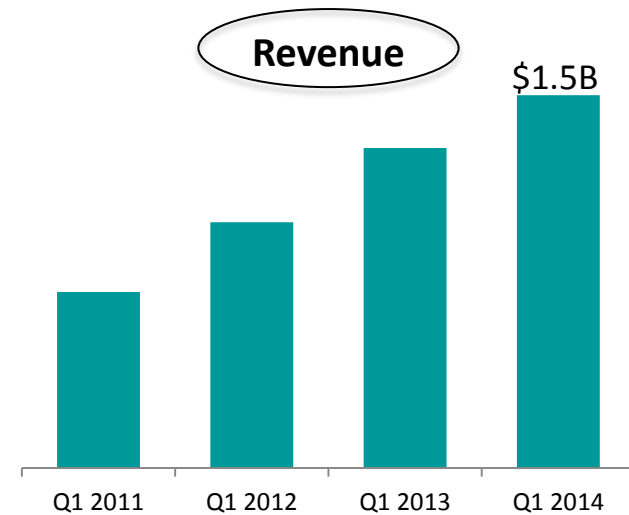
Frank Martire
Chairman and CEO



First Quarter 2014 Highlights

Consistent Execution of Growth Strategy

- **\$1.5 BILLION** revenue, up **4% organic**
- **\$0.68** adjusted EPS, up **10%**
- **\$248 MILLION** adjusted cash flow from operations
- **\$245 MILLION** returned to shareholders
- **HIGH** visibility into future growth



OPERATIONS REVIEW

Gary Norcross

President and Chief Operating Officer



Operational Highlights

- Capitalizing on **GLOBAL** market trends
- **INVESTING** in growth markets
- Delivering **INNOVATION**
- Driving **GROWTH**

Key Takeaways



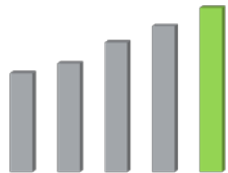
Strong start to the year



Strong sales and pipeline



Strong and growing client relationships



Investing for growth

FINANCIAL SUMMARY

Woody Woodall

Chief Financial Officer



Consolidated Results - Adjusted

(\$ Millions, except per share data)

METRICS	2014	2013
Revenue	\$ 1,529	\$ 1,478
<i>Growth</i>	3%	
<i>Organic growth</i>	4%	
EBITDA	\$ 445	\$ 428
<i>Growth</i>	4%	
EBITDA Margin	29.1%	29.0%
Net Earnings	\$ 197	\$ 182
<i>Growth</i>	8%	
EPS	\$ 0.68	\$ 0.62
<i>Growth</i>	10%	

Refer to www.investor.fisglobal.com for reconciliation of GAAP to non-GAAP items. See appendix for description of non-GAAP financial measures.

Financial Solutions | (*\$ Millions, Adjusted*)

METRICS	2014	2013
Revenue	\$ 587	\$ 575
<i>Growth</i>	2%	
<i>Organic growth</i>	2%	
EBITDA	\$ 227	\$ 228
<i>EBITDA Margin</i>	38.7%	39.6%

Refer to www.investor.fisglobal.com for reconciliation of GAAP to non-GAAP items. See appendix for description of non-GAAP financial measures.

Payment Solutions | (*\$ Millions, Adjusted*)

METRICS	2014	2013
Revenue	\$ 629	\$ 612
<i>Growth</i>	3%	
<i>Organic growth</i>	3%	
EBITDA	\$ 264	\$ 258
<i>EBITDA Margin</i>	42.1%	42.2%

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International Solutions | (*\$ Millions, Adjusted*)

METRICS	2014	2013
Revenue	\$ 314	\$ 292
<i>Growth</i>	8%	
<i>Organic growth</i>	10%	
EBITDA	\$ 59	\$ 59
<i>EBITDA Margin</i>	18.8%	20.3%

Refer to www.investor.fisglobal.com for reconciliation of GAAP to non-GAAP items. See appendix for description of non-GAAP financial measures.

Non-GAAP Reconciliation – Earnings Per Share

	<u>2014</u>	<u>2013</u>
GAAP net earnings per share from continuing operations	<u>\$ 0.53</u>	<u>\$ 0.50</u>
Adjustments:		
Acquisition-related amortization	0.13	0.14
Gain on previously held minority interest in mFoundry		(0.02)
Contract Settlement	0.02	
Adjusted EPS	<u>\$ 0.68</u>	<u>\$ 0.62</u>
<i>Growth</i>	<i>10%</i>	
Shares Outstanding:		
Weighted Average - Diluted	291.9	295.5
Period End - Diluted	290.5	
Period End - Basic	286.8	

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Free Cash Flow | (\$ Millions)

	Q1 2014	Q1 2013
Cash Flow from Operations	\$ 223	\$ 208
Capco Acquisition Related Payments	28	\$ -
Settlement Activity	(3)	14
Adjusted Cash Flow from Operations	\$ 248	\$ 221
Capital Expenditures	(90)	(74)
Free Cash Flow	\$ 158	\$ 148

Calculations may differ due to rounding.

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Executing Capital Allocation Strategy

- **Investing for growth**

- Innovation
- Product and market expansion
- Strategic, tuck-in acquisitions

- **Maintaining a strong balance sheet**

- \$4.8 billion debt outstanding as of March 31
- 2.6 times debt-to-EBITDA

- **Returning cash to shareholders**

- \$70 million in dividends, 9% increase to \$0.24 per share in Q1
- \$175 million in share repurchases, new \$2 billion program approved in Q1

2014 Financial Outlook

METRIC	RANGE
Organic revenue growth	4.5% to 6.5%
Earnings per share, as adjusted <i>Growth</i>	\$3.05 to \$3.16 + 8% to 12%
Free cash flow conversion	~ adjusted net earnings

KEY TAKEAWAYS

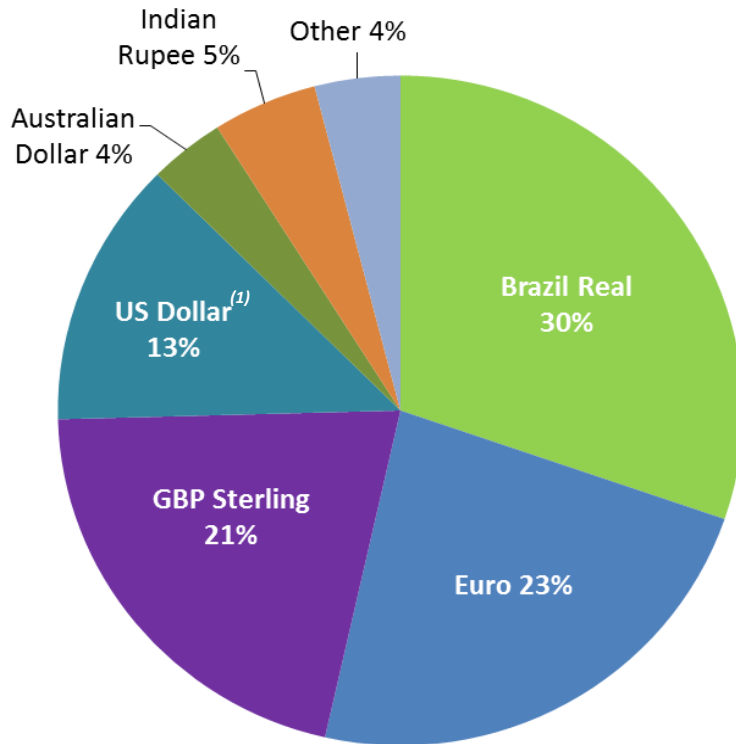
- ✓ Consistent **EXECUTION**
- ✓ **ON TRACK** to achieve full-year targets
- ✓ **DISCIPLINED** capital allocation
- ✓ Focused on **SHAREHOLDER RETURNS**

APPENDIX



Foreign Currency

International Solutions Group Revenue Composition (Q1-14)



⁽¹⁾ Represents International contracts that are contracted in US Dollars versus local currencies.

Costs

- Majority of costs within **International Solutions Group** are denominated in local currencies, reducing P&L impact
- Costs related to captive operation in India are carried in **Financial Solutions Group**

Debt Summary | (\$ Millions)

	Rate	Mar 31, 2014	Dec 31, 2013
Revolver	L+125 bps	\$ 443	\$ 29
<i>Undrawn revolver capacity⁽¹⁾</i>	<i>25 bps</i>	<i>1,557</i>	<i>1,971</i>
Term Loan (2017 Maturity)	L+125 bps	1,863	1,963
2018 Notes	2.000%	250	250
2020 Notes	7.875%	500	500
2022 Notes	5.000%	700	700
2023 Notes	3.500%	1,000	1,000
Other	Various	23	27
Total Debt		\$ 4,779	\$ 4,469
<i>Weighted-Average Interest Rate</i>		<i>3.6%</i>	<i>4.0%</i>
<i>Leverage Ratio</i>		<i>2.6</i>	<i>2.4</i>

⁽¹⁾ Excludes letters of credit issued under the revolver of \$0.8 million in both periods.

Non-GAAP Financial Measures

- Organic revenue includes adjusted revenue plus pre-acquisition revenue for companies acquired during the applicable reporting periods. Organic revenue excludes the impact of foreign currency fluctuation.
- Adjusted revenue (2014) includes reported revenue and is increased by \$9 million for a negotiated contract cash settlement for the extinguishment of certain contractual minimums with a reseller. Although the 2014 cash settlement has no contractual performance obligation, under GAAP the cash settlement revenue is amortized in this circumstance over the remaining relationship with the reseller. Adjusted EBITDA (2014) is also adjusted for this settlement.
- EBITDA is earnings from continuing operations before interest, taxes, depreciation and amortization.
- Adjusted net earnings excludes the after-tax impact of acquisition-related amortization and, for 2014, includes the after-tax impact of adjusted revenue.
- Adjusted cash flow from operations is GAAP cash flow from operations as adjusted for the net change in settlement assets and obligations and certain payments for contingent purchase price and incentive compensation programs associated with the 2010 acquisition of Capco.
- Adjusted net earnings per diluted share, or adjusted EPS, is equal to adjusted net earnings divided by weighted average diluted shares outstanding.
- Free cash flow is adjusted operating cash flow less capital expenditures. Free cash flow does not represent our residual cash flow available for discretionary expenditures, since we have mandatory debt service requirements and other non-discretionary expenditures that are not deducted from the measure.