



THIRD QUARTER 2014 EARNINGS CALL SUPPLEMENTAL MATERIALS

October 30, 2014



Agenda

TOPIC	SPEAKER
Third 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 October 30, 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.

THIRD QUARTER 2014 HIGHLIGHTS

Frank Martire

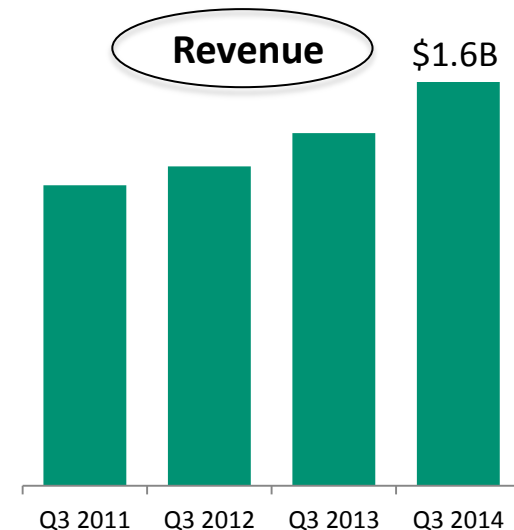
Chairman and CEO



Third Quarter 2014 Highlights

Consistent Execution of Growth Strategy

- **\$1.6 BILLION** revenue, up **7%**
- **\$0.80** adjusted EPS, up **8%**
- **\$287 MILLION** adjusted cash flow from operations
- **\$218 MILLION** returned to shareholders
- **INVESTING** for growth



OPERATIONS REVIEW

Gary Norcross

President and Chief Operating Officer



Operational Highlights

- Capitalizing on **GLOBAL** market trends
- Delivering strategic **VALUE** to clients
- **INVESTING** in growth markets and innovation
- Driving **PROFITABLE GROWTH**

Acquisition of Clear2Pay

- **MEETS** accelerating demand in payments market
- Provides leading **SOLUTIONS** for clients
- Adds deep industry **KNOWLEDGE** and **TALENT** to FIS
- Leverage **GLOBAL DISTRIBUTION** of FIS

Key Takeaways



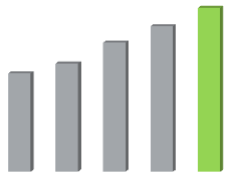
Strong year to date results



Strong sales and execution



Expanding global client relationships



Investing for growth

FINANCIAL SUMMARY

Woody Woodall

Chief Financial Officer



Consolidated Results

(\$ Millions, adjusted, except per share data)

METRICS	Q3	9 Months
Revenue	\$ 1,605	\$ 4,734
<i>Growth vs. 2013</i>	<i>7%</i>	<i>5%</i>
<i>Organic growth</i>	<i>5%</i>	<i>5%</i>
EBITDA	\$ 488	\$ 1,402
<i>Growth vs. 2013</i>	<i>4%</i>	<i>4%</i>
<i>EBITDA Margin</i>	<i>30.4%</i>	<i>29.6%</i>
Net Earnings	\$ 229	\$ 646
<i>Growth vs. 2013</i>	<i>5%</i>	<i>6%</i>
EPS	\$ 0.80	\$ 2.23
<i>Growth vs. 2013</i>	<i>8%</i>	<i>8%</i>

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	Q3	9 Months
Revenue	\$ 633	\$ 1,849
<i>Growth vs. 2013</i>	9%	6%
<i>Organic growth</i>	6%	5%
EBITDA	\$ 251	\$ 727
<i>EBITDA Margin</i>	39.6%	39.3%

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	Q3	9 Months
Revenue	\$ 615	\$ 1,867
<i>Growth vs. 2013</i>	<i>2%</i>	<i>2%</i>
<i>Organic growth</i>	<i>2%</i>	<i>2%</i>
EBITDA	\$ 262	\$ 780
<i>EBITDA Margin</i>	<i>42.7%</i>	<i>41.8%</i>

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

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

METRICS	Q3	9 Months
Revenue	\$ 358	\$ 1,020
<i>Growth vs. 2013</i>	<i>12%</i>	<i>11%</i>
<i>Organic growth</i>	<i>9%</i>	<i>10%</i>
EBITDA	\$ 82	\$ 217
<i>EBITDA Margin</i>	22.9%	21.3%

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Non-GAAP Reconciliation – Earnings Per Share

	<u>Q3 2014</u>	<u>Q3 2013</u>
GAAP net earnings per share from continuing operations	\$ 0.53	\$ 0.60
Adjustments:		
Purchase Price Amortization	0.13	0.13
Refinance Costs	0.09	-
Acquisition, Integration, and Severance Costs	0.06	-
Capco Acquisition Adjustments	-	0.02
Adjusted EPS	\$ 0.80	\$ 0.74
<i>Growth</i>	<i>8%</i>	
Shares Outstanding:		
Weighted Average - Diluted	287.0	293.2
<i>* Amounts may not sum due to rounding</i>		

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Free Cash Flow | (\$ Millions)

	<u>Q3</u>	<u>9 Months</u>
Cash Flow from Operations	\$ 208	\$ 687
Settlement Activity	47	31
Bond Premium Payment	30	30
Capco Acquisition Related Payments	3	33
Adjusted Cash Flow from Operations	\$ 287	\$ 780
Capital Expenditures	(86)	(273)
Free Cash Flow	\$ 201	\$ 508

Calculations may differ due to rounding.

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Executing Capital Allocation Strategy

- **Investing for growth**

- Innovation
- Product and market expansion
- Strategic acquisitions

- **Maintaining a strong balance sheet**

- \$5.0 billion debt outstanding as of September 30
- 2.6 times debt-to-EBITDA

- **Returning cash to shareholders**

- \$68 million in dividends in Q3 (\$206M YTD)
- \$150 million in share repurchases in Q3 (\$475M YTD)
- \$1,524 million remaining under current share repurchase authorization

Clear2Pay Acquisition

- **Accretive to revenue and earnings growth**
- **Margins expand as synergies realized**
- **Full-year revenue of approximately \$135 million in 2014**

2014 Financial Outlook

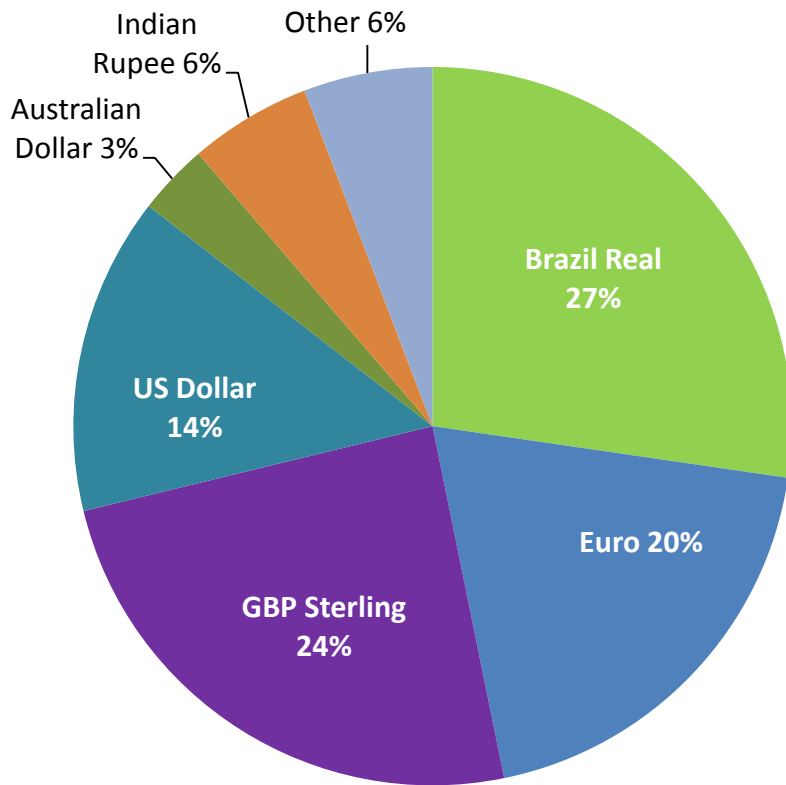
METRIC	February 2014	October 2014
Organic revenue growth	4.5% to 6.5%	4.5% to 6.5%
Earnings per share, as adjusted	\$3.05 to \$3.16	\$3.06 to \$3.12
<i>Growth</i>	+ 8% to 12%	+ 9% to 11%
Free cash flow conversion	~ adjusted net earnings	~ adjusted net earnings

APPENDIX



Foreign Currency

International Solutions Group Revenue Composition (Q3-14)



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**

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

Debt Summary | (\$ Millions)

	Rate	Sep 30, 2014	Dec 31, 2013
Revolver ⁽¹⁾	L+125 bps	\$ 723	\$ 29
<i>Undrawn revolver capacity</i>	<i>25 bps</i>	<i>1,277</i>	<i>1,971</i>
Term Loan (2017 Maturity)	L+125 bps	1,300	1,963
2017 Notes	1.450%	300	-
2018 Notes	2.000%	250	250
2020 Notes	7.875%	-	500
2022 Notes	5.000%	700	700
2023 Notes	3.500%	1,000	1,000
2024 Notes	3.875%	700	-
Other	Various	-	27
Total Debt		\$ 4,973	\$ 4,469
<i>Weighted-Average Interest Rate</i>		<i>3.1%</i>	<i>4.0%</i>
<i>Leverage Ratio</i>		<i>2.6</i>	<i>2.4</i>

⁽¹⁾ Includes \$43m borrowed on September 30, 2014 to fund settlement

Non-GAAP Financial Measures

- Organic revenue includes reported revenue (adjusted revenue for 2014) plus pre-acquisition revenue for companies acquired during the applicable reporting periods. Organic revenue excludes the impact of foreign currency fluctuation in 2014.
- 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.
- EBITDA is earnings from continuing operations before interest, taxes, depreciation and amortization.
- Adjusted EBITDA (2014 comparative data) includes the contract cash settlement revenue and excludes certain acquisition, integration and severance costs.
- Adjusted EBITDA (2013 comparative data) excludes adjustments related to the 2010 acquisition of Capco.
- Adjusted net earnings (2014 comparative data) excludes the after-tax impact of certain acquisition, integration, severance and refinancing costs as well as acquisition-related amortization and includes the after-tax impact of adjusted revenue.
- Adjusted net earnings (2013 comparative data) excludes the after-tax impact of acquisition related amortization, a net benefit related to a gain on the mFoundry acquisition, debt issuance and refinancing costs and adjustments related to the Capco acquisition.
- Adjusted net earnings per diluted share, or adjusted EPS, is equal to adjusted net earnings divided by weighted average diluted shares outstanding.
- Adjusted cash flow from operations (2014 comparative data) is GAAP cash flow from operations as adjusted for the net change in settlement assets and obligations, and excludes certain payments for contingent purchase price and incentive compensation programs associated with the 2010 acquisition of Capco and the premium paid related to the early redemption of senior notes.
- Adjusted cash flow from operations (2013 comparative data) is GAAP cash flow from operations as adjusted for the net change in settlement assets and obligations and excludes the premium paid related to the early redemption of senior notes.
- 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.