



2012 IN REVIEW

February 12, 2013

Fourth Quarter and Full Year 2012
Earnings Summary



2012 IN REVIEW

TOPIC	SPEAKER
Results Summary	Frank Martire, Chairman and CEO
Operations Review	Gary Norcross, President and Chief Operating Officer
Financial Summary	Mike Hayford, Chief Financial Officer

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 February 12, 2013, our annual report on Form 10-K for 2011, our quarterly reports on Form 10-Q 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 earnings before interest, taxes, depreciation and amortization (EBITDA)
- Adjusted net earnings
- Free cash flow

These 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 financial measures. 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 to the related GAAP measures are provided in the Investor Relations section of the FIS Web site, www.fisglobal.com.



RESULTS SUMMARY

Frank Martire
Chairman and CEO



REACHING NEW MILESTONES | 2012 RESULTS

\$5.8 BILLION Revenue

\$1.7 BILLION Adjusted EBITDA

\$2.50 Adjusted EPS

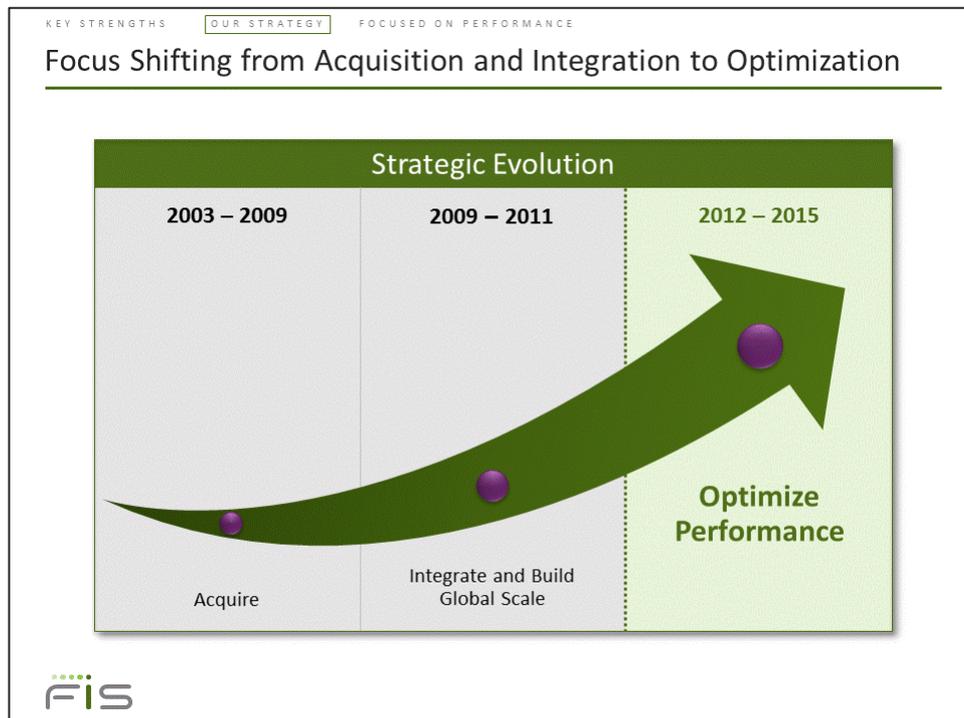
\$1.2 BILLION Adjusted Operating Cash Flow

\$873 MILLION Free cash flow

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

EXECUTING THE STRATEGY

INVESTOR DAY 2012



DRIVING RESULTS

- Organic Growth
- Margin Expansion
- Double-Digit EPS Growth
- Disciplined Capital Allocation

STRONG 2012 PERFORMANCE

METRICS	GUIDANCE	2012 RESULTS	
Revenue Growth (Organic)	3% to 5%	5%	✓
EBITDA Growth	5% to 7%	5%	✓
Margin Expansion	40 to 80 bps	60 bps	✓
EPS	\$2.45 to \$2.55	\$2.50 +13%	✓
Free Cash Flow Conversion	~adjusted net earnings	117%	✓

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STRONG CLIENT FOCUS

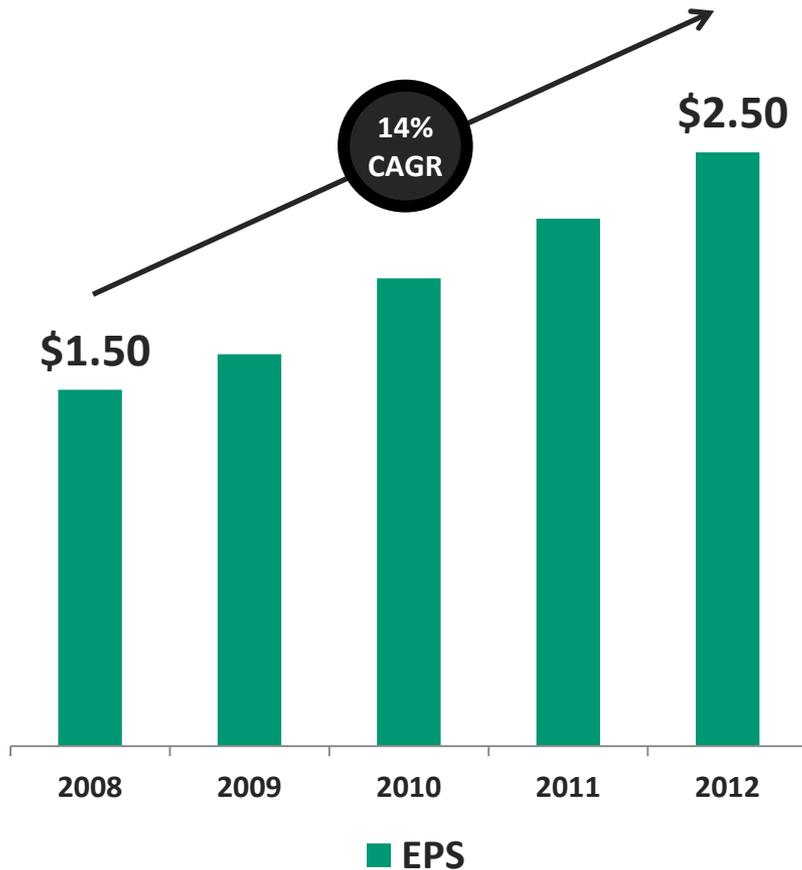
- Expanding **RELATIONSHIPS**
- Driving **SALES** success
- Enabling **TRANSFORMATION**

DISCIPLINED CAPITAL ALLOCATION

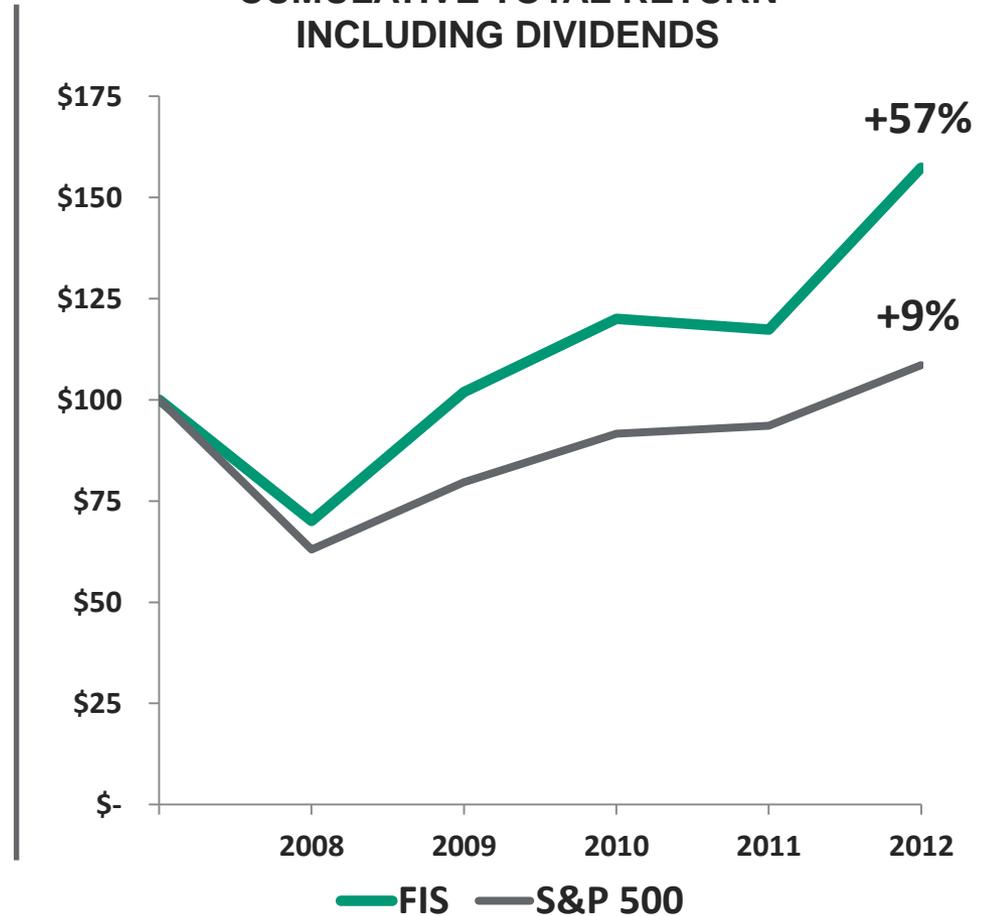
- **Invested for growth**
 - \$296 million for new product development and infrastructure enhancements
 - Tuck-in acquisitions
- **Strengthened balance sheet**
 - Reduced debt by \$424 million
 - Improved Debt-to-EBITDA to 2.5 times
 - Achieved investment grade credit ratings
- **Returned \$686 million of cash to shareholders**

TRACK RECORD OF STRONG PERFORMANCE

EPS GROWTH



CUMULATIVE TOTAL RETURN INCLUDING DIVIDENDS





OPERATIONS REVIEW

Gary Norcross

President and Chief Operating Officer



OPERATING HIGHLIGHTS

- **5% organic revenue growth**
 - Growth on existing business
 - New client wins
- **60 bps margin expansion**
 - Volume growth
 - Disciplined cost management
- **Sales execution**

GLOBAL SALES PERFORMANCE

- Strong year-over-year growth in new contract value sold
- Ongoing shift from single-product purchases to multi-solution partnerships
- Increased deal size and longer contract terms
- Strength around core solutions, professional services and consulting
- Bias towards leveraged solutions versus license deals



ENABLING TRANSFORMATION

- **Large-scale opportunities**
- **Leveraging FIS' scale, consulting expertise and services around intellectual property**
- **Key market differentiator**

EXPANDING OUR VALUE PROPOSITION

- Enhancing solution suite
- Continued focus on integration
- Ongoing investment in innovation



INVESTING IN HIGH-GROWTH INNOVATION



TRANSACTION SUMMARY

- **Definitive agreement to acquire remaining 78% ownership interest in mFoundry**
- **A foremost provider of mobile banking and payment solutions**
- **Customer base includes more than 850 banks, credit unions payment processors and retailers**

STRATEGIC RATIONALE

- ✓ **Supports FIS' commitment to deliver innovative mobile solutions to our clients**
- ✓ **Aligns with strategy to invest in high-growth emerging technologies**
- ✓ **Enables FIS to leverage assets across broad distribution network**

KEY TAKEAWAYS

- **Delivering on plan to drive organic revenue growth and margin expansion**
- **Investing in solution innovation and integration**
- **Strong sales momentum heading into 2013**



FINANCIAL SUMMARY

Mike Hayford

Chief Financial Officer



2012 CONSOLIDATED RESULTS | (\$ MILLIONS)

METRICS	FOURTH QUARTER	FULL YEAR
Revenue	\$1,500	\$5,808
<i>Growth</i>	3%	3%
<i>Organic growth</i>	3%	5%
Adjusted EBITDA	\$470	\$1,745
<i>Growth</i>	2%	5%
Adjusted EBITDA Margin	31.4%	30.1%
<i>Y-O-Y Change</i>	-10 bps	+60 bps
Adjusted EPS	\$0.68	\$2.50
<i>Growth</i>		13%

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

2012 CONSOLIDATED RESULTS

	FOURTH QUARTER	FULL YEAR
GAAP net earnings per share from continuing operations	\$0.49	\$1.82
Adjustments:		
Acquisition-related amortization	0.13	0.55
Stock acceleration and other compensation charges ⁽¹⁾	0.05	0.10
Debt refinancing costs ⁽²⁾	-	0.04
Adjusted EPS	\$0.68	\$2.50
<i>Increase</i>		13%
Average Diluted Shares	298M	298M

Calculations may differ due to rounding.

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

2012 FINANCIAL SOLUTIONS | (\$ MILLIONS)

METRICS	FOURTH QUARTER	FULL YEAR
Revenue	\$578	\$2,246
<i>Growth</i>	8%	8%
<i>Organic Growth</i>	6%	7%
EBITDA	\$237	\$884
<i>Growth</i>	11%	5%
EBITDA Margin	41.0%	39.4%
<i>Y-O-Y change</i>	+90 bps	-110 bps

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

2012 PAYMENT SOLUTIONS | (\$ MILLIONS)

METRICS	FOURTH QUARTER	FULL YEAR
Revenue	\$601	\$2,381
<i>Growth</i>	-1%	0.4%
<i>Growth, as adjusted⁽³⁾</i>	1%	2%
EBITDA	\$246	\$968
<i>Growth</i>	-	7%
EBITDA Margin	40.9%	40.7%
<i>Y-O-Y change</i>	+40 bps	+240 bps

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

2012 INTERNATIONAL SOLUTIONS | (\$ MILLIONS)

METRICS	FOURTH QUARTER	FULL YEAR
Revenue	\$321	\$1,181
<i>Growth</i>	1%	0.2%
<i>Organic growth</i>	6%	9%
EBITDA	\$89	\$275
<i>Growth</i>	-4%	2%
EBITDA Margin	27.8%	23.3%
<i>Y-O-Y change</i>	-130 bps	+40 bps

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

2012 FREE CASH FLOW | (\$ MILLIONS)

	FULL YEAR
Cash flow from operations ⁽⁴⁾	\$1,047
Tax payments related to sale of healthcare business	105
Settlement activity	17
Adjusted cash flow from operations	1,169
Capital expenditures	(296)
Free Cash Flow	\$873
<i>Growth</i>	<i>+9%</i>

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

EXECUTING CAPITAL ALLOCATION STRATEGY

- **Invested for growth**

- \$296 million in capital expenditures
- \$64 million in product acquisitions

- **Strengthened the balance sheet**

- Reduced debt by \$424 million
- Amended and extended credit facilities
- Debt-to-EBITDA improved to 2.5 times
- Achieved investment grade ratings

- **Returned \$686 million cash to shareholders**

- \$235 million in dividends
- \$451 million in share repurchases

mFoundry – TRANSACTION OVERVIEW

- **Supports product-focused M&A strategy**
“Buy, build or partner to acquire additional products to cross sell.”
- **Approximately \$120 million to acquire remaining 78% interest**
- **Slightly dilutive to 2013 EPS**
 - Included in 2013 guidance
- **Anticipate closing in first quarter 2013**
 - Subject to Hart Scott-Rodino clearance and other customary closing conditions



2012 KEY TAKEAWAYS

- ✓ **Executing the shift in corporate strategy**
- ✓ **Delivering on all financial commitments**
- ✓ **Managing the business for continued strong performance**

Focused on Shareholder Returns

The FIS logo is rendered in white. It features a stylized 'F' with three dots above it, a lowercase 'i' with two dots above it, and an 'S'. The background is a gradient from teal to purple with a pattern of dots and lines.

FIS

**Focused on
Shareholder Returns**



APPENDIX



NON-GAAP FINANCIAL RESULTS – Q4 2012 | (\$ MILLIONS)

Organic revenue growth is calculated as the difference between (A) reported revenue for the current period excluding foreign currency impacts and (B) reported revenue for the prior period plus pre-acquisition revenues for prior period acquisitions excluding purchase accounting adjustments divided by (B).

Fourth Quarter			
(2012 and 2011 comparative data)	2012	2011	Organic Growth
GAAP reported revenue	\$1,500.1	\$1,461.3	
Pre-acquisition revenue	-	10.4	
Currency impact	16.7	-	
Adjusted revenue (A)	\$1,516.8	\$1,471.7 (B)	3.1% (A)/(B)

Segment Organic Growth							
Fourth Quarter							
(2012 and 2011 comparative data)	2012 Reported	Fx Impact	2012 Adjusted Revenue	2011 Reported	In Year Acquisitions	2011 Adjusted Revenue	Organic Growth
Financial Solutions	\$578.4	-	\$578.4	\$533.4	\$10.4	\$543.8	6.4%
Payment Solutions	601.3	-	601.3	608.9	-	608.9	-1.2%
International Solutions	320.9	16.7	337.6	318.8	-	318.8	5.9%
Corporate	(0.5)	-	(0.5)	0.2	-	0.2	Nm
Adjusted Revenue	\$1,500.1	\$16.7	\$1,516.8	\$1,461.3	\$10.4	\$1,471.7	3.1%

NON-GAAP FINANCIAL RESULTS – FY 2012 | (\$ MILLIONS)

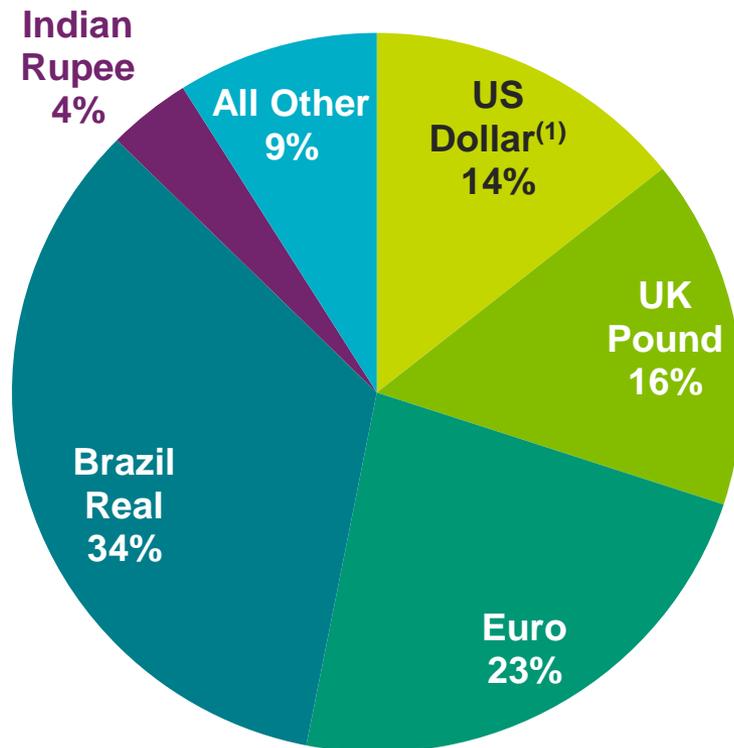
Organic revenue growth is calculated as the difference between (A) reported revenue for the current period excluding foreign currency impacts and (B) reported revenue for the prior period plus pre-acquisition revenues for prior period acquisitions excluding purchase accounting adjustments divided by (B).

Twelve Months Ended December 31,			
(2012 and 2011 comparative data)	2012	2011	Organic Growth
GAAP reported revenue	\$5,807.6	\$5,625.6	
Pre-acquisition revenue	-	21.7	
Currency impact	99.7	-	
Adjusted revenue	(A) \$5,907.3	\$5,647.3 (B)	4.6% (A)/(B)

Segment Organic Growth		Twelve Months Ended December 31,					
(2012 and 2011 comparative data)	2012 Reported	Fx Impact	2012 Adjusted Revenue	2011 Reported	In Year Acquisitions	2011 Adjusted Revenue	Organic Growth
Financial Solutions	\$2,246.4	-	\$2,246.4	\$2,076.8	\$21.7	\$2,098.5	7.0%
Payment Solutions	2,380.6	-	2,380.6	2,372.1	-	2,372.1	0.4%
International Solutions	1,180.5	99.7	1,280.2	1,177.6	-	1,177.6	8.7%
Corporate	0.1	-	0.1	(0.9)	-	(0.9)	Nm
Adjusted Revenue	\$5,807.6	\$99.7	\$5,907.3	\$5,625.6	\$21.7	\$5,647.3	4.6%

FOREIGN CURRENCY

International Solutions Group Revenue Composition (Q4-12)



(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)

	December 31, 2011		December 31, 2012	
	Balance	Rate	Balance	Rate
Term Loan A				
2014 Maturity	\$ 2,089	L + 2.25%	\$ 250	L + 2.25%
2017 Maturity	-	-	2,021	L + 2.00%
Revolver	175	Various	126	Various
Term Loan B (2016)	1,250	L + 3.25%	-	-
Senior Unsecured Notes				
2017 Maturity	750	7.625%	750	7.625%
2020 Maturity	500	7.875%	500	7.875%
2022 Maturity	-	-	700	5.000%
Other	46	NM	38	NM
Total Debt	<u>\$ 4,810</u>		<u>\$ 4,385</u>	
Weighted Average Rate		4.8%		4.9%
Debt-to-EBITDA		2.8x		2.5x

Note: Mandatory quarterly debt payments of \$26.3 million in Q1 2013 and \$39.4 million in Q2-Q4 2013.

NON-GAAP FINANCIAL MEASURES

EBITDA is earnings from continuing operations before interest, taxes and depreciation and amortization.

Adjusted EBITDA (2012 full year comparative data) excludes charges for payments and accelerated vesting of stock option and restricted stock grants associated with the departure or change in role of certain company executives.

Adjusted EBITDA (2011 full year comparative data) excludes a net benefit related to adjustments from the Capco acquisition.

Adjusted net earnings (2012 full year comparative data) exclude the after-tax impact of acquisition related amortization, debt refinancing costs, and charges for payments and accelerated vesting of stock option and restricted stock grants associated with the departure or change in role of certain company executives.

Adjusted net earnings (2011 comparative data) exclude the after-tax impact of acquisition related amortization, a non-cash charge related to an other than temporary decline in the market value of investments, debt refinancing costs and a net benefit related to adjustments from the Capco acquisition.

Adjusted net earnings per share is equal to adjusted net earnings divided by the weighted average diluted shares outstanding.

Free cash flow is GAAP operating cash flow less capital expenditures and excludes the net change in settlement assets and obligations. Operating cash flow in 2012 is adjusted to exclude a one-time tax payment attributable to the sale of the Healthcare Benefit Solutions Business.

NOTES

- (1) Charges for payments and accelerated vesting of stock option and restricted stock grants associated with the departure or change in role of certain company executives.
- (2) Represents transaction costs incurred and the write-off of certain previously capitalized debt issuance costs resulting from the early pay down of certain debt and the refinancing activities undertaken in the first quarter of 2012.
- (3) Excludes check-related businesses which declined \$10.0 million (8.0%) to \$115.1 million in the current year quarter and declined \$32.8 million (7.0%) to \$438.9 million in the full year.
- (4) Cash from operations in 2012 includes a \$42 million final payment made for an interest rate swap and a \$28 million payment to our Brazilian venture partner.