

**NON-GAAP RECONCILIATION**

**RSI OPERATING REVENUE**

	<u>2014</u>	<u>2013</u>	<u>2012</u>
		(In thousands)	
Total revenue	\$ 6,638,774	6,419,285	6,256,967
FMS fuel services and SCS subcontracted transportation revenue	(1,329,285)	(1,389,406)	(1,420,243)
Fuel eliminations	237,351	240,615	229,598
Operating revenue	<u>\$ 5,546,840</u>	<u>5,270,494</u>	<u>5,066,322</u>

**FREE CASH FLOW**

	<u>2014</u>	<u>2013</u>
		(In thousands)
Net cash provided by operating activities	\$ 1,369,991	1,223,082
Sales of revenue earning equipment	493,477	445,589
Sale and leaseback of revenue earning equipment	125,825	-
Sales of operating property and equipment	3,486	6,782
Collections on direct finance leases	65,517	70,677
Insurance recoveries and other	(1,250)	8,173
Total cash generated	<u>2,057,046</u>	<u>1,754,303</u>
Purchases of property and revenue earning equipment	(2,259,164)	(2,140,464)
Free cash flow	<u>\$ (202,118)</u>	<u>(386,161)</u>

**COMPARABLE EARNINGS PER SHARE**

	<u>2014</u>	<u>2013</u>	<u>2012</u>	<u>2011</u>	<u>2010</u>	<u>2009</u>	<u>2008</u>
EPS	\$ 4.14	4.63	3.91	3.31	2.37	1.62	4.51
Non-operating pension costs	0.10	0.28	0.37	0.22	0.31	0.50	(0.25)
Pension lump sum settlement expense	1.16	-	-	-	-	-	-
Pension settlement charges	0.14	0.03	-	-	-	-	-
Restructuring and other charges (recoveries), net	0.03	(0.01)	0.11	0.05	-	0.07	0.31
Acquisition-related tax adjustment	0.03	-	-	(0.01)	-	-	-
Acquisition transaction costs	0.01	-	-	0.04	0.08	-	-
Consulting fees	-	-	-	-	-	-	-
Tax law changes and/or benefits from reserve reversals	(0.03)	-	0.02	0.10	(0.21)	(0.11)	(0.17)
Superstorm Sandy vehicle-related (recoveries) losses	-	(0.01)	0.10	-	-	-	-
Foreign currency translation benefit	-	(0.04)	-	-	-	-	-
Tax benefit associated with resolution of prior year tax item	-	-	(0.10)	-	-	-	-
International gain on sale	-	-	-	-	(0.02)	0.12	0.03
Comparable EPS	<u>\$ 5.58</u>	<u>4.88</u>	<u>4.41</u>	<u>3.71</u>	<u>2.53</u>	<u>2.20</u>	<u>4.43</u>

**NON-GAAP RECONCILIATION**

**ADJUSTED RETURN ON CAPITAL**

	<u>2014</u>	<u>2013</u>	<u>2012</u>	<u>2011</u>	<u>2010</u>	<u>2009</u>
			(Dollars in thousands)			
Net earnings [A]	\$ 218,575	237,792	209,979	169,777	118,170	61,945
Restructuring and other charges (recoveries), net and other items	114,956	(154)	16,668	5,748	6,225	29,943
Income taxes	118,168	125,653	90,912	108,425	60,610	53,737
Adjusted net earnings before income taxes	451,699	363,291	317,559	283,950	185,005	145,625
Adjusted interest expense	144,675	140,100	143,353	135,127	132,778	149,968
Adjusted income taxes	(213,786)	(177,267)	(166,635)	(156,581)	(123,429)	(121,758)
Adjusted net earnings [B]	\$ 382,588	326,124	294,277	262,496	194,354	173,835
Average total debt	\$ 4,505,161	3,950,533	3,707,095	3,078,516	2,512,005	2,691,569
Average off-balance sheet debt	131,484	131,316	126,069	77,605	114,212	141,629
Average obligations	4,636,645	4,081,849	3,833,164	3,156,121	2,626,217	2,833,198
Average shareholders' equity [C]	1,926,009	1,593,996	1,406,606	1,428,048	1,401,681	1,395,629
Average adjustments to shareholders' equity	7,758	(2,088)	(2,933)	4,165	2,059	15,645
Average adjusted shareholders' equity	1,933,767	1,591,908	1,403,673	1,432,213	1,403,740	1,411,274
Average adjusted capital [D]	\$ 6,570,412	5,673,757	5,236,837	4,588,334	4,029,957	4,244,472
Return on average shareholders' equity [A]/[C]	11.30%	14.90%	14.90%	11.90%	8.40%	4.40%
Adjusted return on average capital [B]/[D]	5.80%	5.70%	5.60%	5.70%	4.80%	4.10%

**SEGMENT OPERATING REVENUE**

	<u>2014</u>	<u>2013</u>	<u>2012</u>	<u>2011</u>	<u>2010</u>	<u>2009</u>
<b>FMS - Operating Revenue</b>			(In thousands)			
Total revenue	\$ 4,655,758	4,494,685	4,405,325	4,218,330	3,712,153	3,567,836
Fuel services revenue	(1,025,237)	(1,070,201)	(1,084,175)	(1,082,473)	(865,621)	(750,103)
Operating revenue	\$ 3,630,521	3,424,484	3,321,150	3,135,857	2,846,532	2,817,733
<b>SCS - Operating Revenue</b>						
Total Revenue	\$ 2,461,149	2,383,063	2,280,586	2,206,038	1,734,834	1,610,867
Subcontracted transportation	(304,048)	(319,205)	(336,068)	(348,494)	(261,325)	(198,860)
Operating Revenue	\$ 2,157,101	2,063,858	1,944,518	1,857,544	1,473,509	1,412,007
* includes SCS and Dedicated Contract Carriage						

**COMPARABLE EBT FROM CONTINUING OPERATIONS**

	<u>2014</u>	<u>2013</u>
	(In thousands)	
EBT	\$ 338,549	368,895
Non-operating pension costs	9,768	24,285
Pension lump sum settlement expense	97,231	-
Pension settlement charges	12,564	2,820
Restructuring and other charges (recoveries), net	2,387	(470)
Acquisition-related tax adjustment	1,808	-
Acquisition transaction costs	566	-
Consulting fees	400	-
Superstorm Sandy vehicle-related (recoveries) losses	-	(600)
Foreign currency translation benefit	-	(1,904)
Comparable EBT	\$ 463,273	393,026