

Acuere Consultancy

Executive Summary · FY2024-25 · vs vs November 2024 · Figures in Full

At a glance — Revenue **■2,282,167**, Net Profit **■64,143**, Cash Runway **0.2 mo.**

KEY METRICS

| | | | |
|---|---|--|---|
| NET REVENUE ■2,282,167 ▲ +707.8% vs prior | GROSS MARGIN 93.9% ■2,142,167 ▼ -6.1 pts vs prior | EBITDA ■69,011 3.0% margin ▲ +166.0% vs prior | NET PROFIT (PAT) ■64,143 ▲ +147.2% vs prior |
| CASH & BANK ■39,591 bank ■32,738 + cash ■6,853 ▼ -85.9% vs prior | CASH RUNWAY 0.2 mo at ■172,763/mo burn ▼ -0.9 pts vs prior | NET WORKING CAPITAL ■113,889 Current Assets – Current Liabilities ▼ -80.9% vs prior | OVERDUE RECEIVABLES 100.0% ■304,201 ▲ +99.6 pts vs prior |

PROFITABILITY RATIOS

| Metric | Value | Metric | Value |
|----------------|-------|-------------------|-------|
| Gross Margin | 93.9% | EBIT Margin | 2.8% |
| EBITDA Margin | 3.0% | Net (PAT) Margin | 2.8% |
| Opex / Revenue | 90.8% | Interest Coverage | 86.6x |

TOP ALERTS

| Severity | Period | Title | At risk |
|----------|---------|---|-------------|
| CRITICAL | 2024-04 | ■1.08L stuck with customers over 60 days | Rs. 108,401 |
| CRITICAL | 2025-02 | ■3.60L stuck with customers over 60 days | Rs. 359,901 |
| CRITICAL | 2024-10 | Cash runway only 2.6 months | Rs. 174,567 |
| CRITICAL | 2024-10 | ■4.16L stuck with customers over 60 days | Rs. 416,101 |
| CRITICAL | 2024-10 | Bank balance dropped 48% in one period | Rs. 137,460 |
| CRITICAL | 2024-11 | Cash runway only 1.1 months | Rs. 769,661 |
| CRITICAL | 2024-11 | ■2.30L stuck with customers over 60 days | Rs. 230,101 |
| CRITICAL | 2024-11 | EBITDA margin dropped 65.5 pts (from 74.7% to 9.2%) | Rs. 185,083 |

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