

# Acuere Consultancy

Executive Summary · Q1 FY2025-26 (Apr-Jun 2025) · vs vs November 2024 · Figures in Full

**At a glance** — Revenue **■425,000**, Net Profit **■286,135**, Cash Runway **8.2 mo.**

## KEY METRICS

|   |  |  |  |
|---|--|--|--|
| <b>NET REVENUE</b><br><b>■425,000</b><br>▲ +50.4% vs prior                                    | <b>GROSS MARGIN</b><br><b>84.0%</b><br>■357,008<br>▼ -16.0 pts vs prior          | <b>EBITDA</b><br><b>■281,669</b><br>66.3% margin<br>▲ +985.6% vs prior                                     | <b>NET PROFIT (PAT)</b><br><b>■286,135</b><br>▲ +1002.8% vs prior              |
| <b>CASH &amp; BANK</b><br><b>■205,900</b><br>bank ■199,047 + cash ■6,853<br>▼ -26.9% vs prior | <b>CASH RUNWAY</b><br><b>8.2 mo</b><br>at ■25,113/mo burn<br>▲ +7.1 pts vs prior | <b>NET WORKING CAPITAL</b><br><b>■146,987</b><br>Current Assets – Current Liabilities<br>▼ -75.3% vs prior | <b>OVERDUE RECEIVABLES</b><br><b>89.3%</b><br>■197,301<br>▲ +88.9 pts vs prior |

## PROFITABILITY RATIOS

| Metric         | Value | Metric            | Value |
|----------------|-------|-------------------|-------|
| Gross Margin   | 84.0% | EBIT Margin       | 66.3% |
| EBITDA Margin  | 66.3% | Net (PAT) Margin  | 67.3% |
| Opex / Revenue | 17.7% | Interest Coverage | n/a   |

## TOP ALERTS

| Severity | Period  | Title  | At risk     |
|----------|---------|--|-------------|
| CRITICAL | 2025-05 | ■1.89L stuck with customers over 60 days             | Rs. 188,801 |
| CRITICAL | 2025-04 | ■2.05L stuck with customers over 60 days             | Rs. 205,001 |
| CRITICAL | 2025-06 | ■1.97L stuck with customers over 60 days             | Rs. 197,301 |
| CRITICAL | 2025-05 | EBITDA margin dropped 70.8 pts (from 94.2% to 23.4%) | Rs. 95,590  |
| WARNING  | 2025-06 | 15 customers gone quiet — ■5.62L at risk             | Rs. 562,500 |
| WARNING  | 2025-05 | Cash runway down to 5.0 months                       | Rs. 212,890 |
| WARNING  | 2025-05 | 15 customers gone quiet — ■5.62L at risk             | Rs. 562,500 |
| WARNING  | 2025-04 | 15 customers gone quiet — ■5.62L at risk             | Rs. 562,500 |

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