

# Acuere Consultancy

Executive Summary · January 2026 · vs vs January 2025 · Figures in Full

**At a glance** — Revenue **■202,500**, Net Profit **■62,719**, Cash Runway **4.5 mo.**

## KEY METRICS

<b>NET REVENUE</b> <b>■202,500</b> ▲ +22.7% vs prior	<b>GROSS MARGIN</b> <b>82.7%</b> ■167,500 ▼ -17.3 pts vs prior	<b>EBITDA</b> <b>■62,719</b> 31.0% margin ▼ -45.7% vs prior	<b>NET PROFIT (PAT)</b> <b>■62,719</b> ▼ -45.7% vs prior
<b>CASH &amp; BANK</b> <b>■467,444</b> bank ■211,591 + cash ■255,853 ▲ +78.2% vs prior	<b>CASH RUNWAY</b> <b>4.5 mo</b> at ■104,781/mo burn ▼ -0.8 pts vs prior	<b>NET WORKING CAPITAL</b> <b>■709,378</b> Current Assets – Current Liabilities ▼ -14.0% vs prior	<b>OVERDUE RECEIVABLES</b> <b>49.2%</b> ■214,700 ▲ +49.0 pts vs prior

## PROFITABILITY RATIOS

Metric	Value	Metric	Value
Gross Margin	82.7%	EBIT Margin	31.0%
EBITDA Margin	31.0%	Net (PAT) Margin	31.0%
Opex / Revenue	51.7%	Interest Coverage	n/a

## TOP ALERTS

Severity	Period	Title	At risk
CRITICAL	2026-01	■2.15L stuck with customers over 60 days	Rs. 214,700
CRITICAL	2026-01	EBITDA margin dropped 58.2 pts (from 89.2% to 31.0%)	Rs. 117,926
CRITICAL	2026-01	Paying vendors only every 125 days	Rs. 141,600
CRITICAL	2026-01	Revenue fell 25.7% vs 2025-12	Rs. 70,000
WARNING	2026-01	Cash runway down to 4.5 months	Rs. 628,686
WARNING	2026-01	DSO at 67 days — watch this	Rs. 435,950
WARNING	2026-01	15 customers gone quiet — ■5.62L at risk	Rs. 562,500
SUCCESS	2026-01	Portfolio is well diversified (35 customers)	

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