Acuere Consultancy

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

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

KEY METRICS

NET REVENUE ■202,500 ▲ +5.5% vs prior	GROSS MARGIN 82.7% ■167,500 ▼ -17.3 pts vs prior	EBITDA ■62,719 31.0% margin ▼ -61.3% vs prior	NET PROFIT (PAT) ■62,719 ▼ -61.3% vs prior
CASH & BANK ■467,444 bank ■211,591 + cash ■255,853 ▲ +48.3% vs prior	CASH RUNWAY 4.5 mo at ■104,781/mo burn ▼ -6.1 pts vs prior	NET WORKING CAPITAL ■709,378 Current Assets – Current Liabilities ▲ +29.7% vs prior	OVERDUE RECEIVABLES 49.2% ■214,700 ▼ -9.2 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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