

# Acuere Consultancy

Executive Summary · Q4 FY2025-26 (Jan-Mar 2026) · vs vs February 2026 · Figures in Full

**At a glance** — Revenue **■923,500**, Net Profit **■507,206**, Cash Runway **6.4 mo.**

## KEY METRICS

|   |  |  |  |
|---|--|--|--|
| <b>NET REVENUE</b><br><b>■923,500</b><br>▲ +157.6% vs prior                                     | <b>GROSS MARGIN</b><br><b>83.2%</b><br>■768,500<br>▼ -16.8 pts vs prior          | <b>EBITDA</b><br><b>■519,964</b><br>56.3% margin<br>▲ +68.1% vs prior                                      | <b>NET PROFIT (PAT)</b><br><b>■507,206</b><br>▲ +70.7% vs prior                |
| <b>CASH &amp; BANK</b><br><b>■532,860</b><br>bank ■277,007 + cash ■255,853<br>▲ +28.8% vs prior | <b>CASH RUNWAY</b><br><b>6.4 mo</b><br>at ■82,845/mo burn<br>▼ -2.0 pts vs prior | <b>NET WORKING CAPITAL</b><br><b>■486,059</b><br>Current Assets – Current Liabilities<br>▼ -24.5% vs prior | <b>OVERDUE RECEIVABLES</b><br><b>79.7%</b><br>■335,379<br>▲ +42.8 pts vs prior |

## PROFITABILITY RATIOS

| Metric         | Value | Metric            | Value  |
|----------------|-------|-------------------|--------|
| Gross Margin   | 83.2% | EBIT Margin       | 56.3%  |
| EBITDA Margin  | 56.3% | Net (PAT) Margin  | 54.9%  |
| Opex / Revenue | 26.9% | Interest Coverage | 801.2x |

## TOP ALERTS

| Severity | Period  | Title  | At risk     |
|----------|---------|--|-------------|
| CRITICAL | 2026-02 | ■1.82L stuck with customers over 60 days             | Rs. 182,100 |
| 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 | 2026-03 | ■1.82L stuck with customers over 60 days             | Rs. 182,100 |
| CRITICAL | 2026-03 | EBITDA margin dropped 45.5 pts (from 86.3% to 40.8%) | Rs. 164,784 |
| CRITICAL | 2026-01 | Revenue fell 25.7% vs 2025-12                        | Rs. 70,000  |
| WARNING  | 2026-02 | 15 customers gone quiet — ■5.62L at risk             | Rs. 562,500 |

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