

Acuere Consultancy

Executive Summary · Q4 FY2025-26 (Jan-Mar 2026) · vs vs FY2024-25 YTD · Figures in Full

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

KEY METRICS

| | | | |
|---|--|---|--|
| NET REVENUE ■923,500 ▼ -59.5% vs prior | GROSS MARGIN 83.2% ■768,500 ▼ -10.6 pts vs prior | EBITDA ■519,964 56.3% margin ▲ +653.4% vs prior | NET PROFIT (PAT) ■507,206 ▲ +690.7% vs prior |
| CASH & BANK ■532,860 bank ■277,007 + cash ■255,853 ▲ +1245.9% vs prior | CASH RUNWAY 6.4 mo at ■82,845/mo burn ▲ +6.2 pts vs prior | NET WORKING CAPITAL ■486,059 Current Assets – Current Liabilities ▲ +326.8% vs prior | OVERDUE RECEIVABLES 79.7% ■335,379 ▼ -20.3 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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