

Acuere Consultancy

Executive Summary · Q4 FY2025-26 (Jan-Mar 2026) · vs vs H1 FY2024-25 (Apr 2024-Sep 2024) · Figures in Full

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

KEY METRICS

NET REVENUE ■923,500 ▼ -23.7% vs prior	GROSS MARGIN 83.2% ■768,500 ▼ -16.8 pts vs prior	EBITDA ■519,964 56.3% margin ▲ +9.8% vs prior	NET PROFIT (PAT) ■507,206 ▲ +7.1% vs prior
CASH & BANK ■532,860 bank ■277,007 + cash ■255,853 ▲ +84.3% vs prior	CASH RUNWAY 6.4 mo at ■82,845/mo burn ▲ +4.1 pts vs prior	NET WORKING CAPITAL ■486,059 Current Assets – Current Liabilities ▼ -9.7% 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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