

Acuere Consultancy

Executive Summary · H2 FY2024-25 (Oct 2024-Mar 2025) · vs vs H1 FY2025-26 (Apr 2025-Sep 2025) · Figures in Full

At a glance — Revenue **■1,072,500**, Net Profit (**■409,601**), Cash Runway **0.2 mo.**

KEY METRICS

NET REVENUE ■1,072,500 ▼ -10.0% vs prior	GROSS MARGIN 86.9% ■932,500 ▼ -7.3 pts vs prior	EBITDA (■404,733) -37.7% margin ▼ -142.2% vs prior	NET PROFIT (PAT) (■409,601) ▼ -142.5% vs prior
CASH & BANK ■39,591 bank ■32,738 + cash ■6,853 ▼ -90.4% vs prior	CASH RUNWAY 0.2 mo at ■222,872/mo burn ▼ -14.9 pts vs prior	NET WORKING CAPITAL ■113,889 Current Assets – Current Liabilities ▼ -81.0% vs prior	OVERDUE RECEIVABLES 100.0% ■304,201 ▲ +42.0 pts vs prior

PROFITABILITY RATIOS

Metric	Value	Metric	Value
Gross Margin	86.9%	EBIT Margin	-38.1%
EBITDA Margin	-37.7%	Net (PAT) Margin	-38.2%
Opex / Revenue	124.7%	Interest Coverage	-545.9x

TOP ALERTS

Severity	Period	Title	At risk
CRITICAL	2025-02	■3.60L stuck with customers over 60 days	Rs. 359,901
CRITICAL	2024-10	Cash runway only 2.6 months	Rs. 174,567
CRITICAL	2024-10	■4.16L stuck with customers over 60 days	Rs. 416,101
CRITICAL	2024-10	Bank balance dropped 48% in one period	Rs. 137,460
CRITICAL	2024-11	Cash runway only 1.1 months	Rs. 769,661
CRITICAL	2024-11	■2.30L stuck with customers over 60 days	Rs. 230,101
CRITICAL	2024-11	EBITDA margin dropped 65.5 pts (from 74.7% to 9.2%)	Rs. 185,083
CRITICAL	2024-12	■3.84L stuck with customers over 60 days	Rs. 383,501

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