

# Acuere Consultancy

Executive Summary · Q4 FY2025-26 (Jan-Mar 2026) · vs vs H1 FY2025-26 (Apr 2025-Sep 2025) · Figures in Full

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

## KEY METRICS

<b>NET REVENUE</b> <b>■923,500</b> ▼ -22.5% vs prior	<b>GROSS MARGIN</b> <b>83.2%</b> ■768,500 ▼ -11.1 pts vs prior	<b>EBITDA</b> <b>■519,964</b> 56.3% margin ▼ -45.8% vs prior	<b>NET PROFIT (PAT)</b> <b>■507,206</b> ▼ -47.4% vs prior
<b>CASH &amp; BANK</b> <b>■532,860</b> bank ■277,007 + cash ■255,853 ▲ +29.7% vs prior	<b>CASH RUNWAY</b> <b>6.4 mo</b> at ■82,845/mo burn ▼ -8.6 pts vs prior	<b>NET WORKING CAPITAL</b> <b>■486,059</b> Current Assets – Current Liabilities ▼ -18.9% vs prior	<b>OVERDUE RECEIVABLES</b> <b>79.7%</b> ■335,379 ▲ +21.7 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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