

Acuere Consultancy

Executive Summary · May 2025 · vs vs Q1 FY2025-26 (Apr-Jun 2025) · Figures in Full

At a glance — Revenue **■135,000**, Net Profit **■31,526**, Cash Runway **5.0 mo.**

KEY METRICS

| | | | |
|---|--|--|---|
| NET REVENUE ■135,000 ▼ -68.2% vs prior | GROSS MARGIN 49.6% ■67,008 ▼ -34.4 pts vs prior | EBITDA ■31,526 23.4% margin ▼ -88.8% vs prior | NET PROFIT (PAT) ■31,526 ▼ -89.0% vs prior |
| CASH & BANK ■178,542 bank ■171,689 + cash ■6,853 ▼ -13.3% vs prior | CASH RUNWAY 5.0 mo at ■35,482/mo burn ▼ -3.2 pts vs prior | NET WORKING CAPITAL ■100,917 Current Assets – Current Liabilities ▼ -31.3% vs prior | OVERDUE RECEIVABLES 100.0% ■197,301 ▲ +10.7 pts vs prior |

PROFITABILITY RATIOS

| Metric | Value | Metric | Value |
|----------------|-------|-------------------|-------|
| Gross Margin | 49.6% | EBIT Margin | 23.4% |
| EBITDA Margin | 23.4% | Net (PAT) Margin | 23.4% |
| Opex / Revenue | 26.3% | Interest Coverage | n/a |

TOP ALERTS

| Severity | Period | Title | At risk |
|----------|---------|--|-------------|
| CRITICAL | 2025-05 | ■1.89L stuck with customers over 60 days | Rs. 188,801 |
| CRITICAL | 2025-05 | EBITDA margin dropped 70.8 pts (from 94.2% to 23.4%) | Rs. 95,590 |
| WARNING | 2025-05 | Cash runway down to 5.0 months | Rs. 212,890 |
| WARNING | 2025-05 | 15 customers gone quiet — ■5.62L at risk | Rs. 562,500 |
| CRITICAL | 2025-05 | Revenue fell 20.6% vs 2025-04 | Rs. 35,000 |
| WARNING | 2025-05 | Bank balance down 24% vs prior period | Rs. 56,550 |
| SUCCESS | 2025-05 | Portfolio is well diversified (35 customers) | |

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