

Acuere Consultancy

Executive Summary · H2 FY2025-26 (Oct 2025-Mar 2026) · vs vs Q1 FY2025-26 (Apr-Jun 2025) · Figures in Full

At a glance — Revenue **■1,641,500**, Net Profit **■1,098,456**, Cash Runway **8.5 mo**.

KEY METRICS

| | | | |
|--|--|---|---|
| NET REVENUE ■1,641,500 ▲ +286.2% vs prior | GROSS MARGIN 90.6% ■1,486,500 ▲ +6.6 pts vs prior | EBITDA ■1,111,214 67.7% margin ▲ +294.5% vs prior | NET PROFIT (PAT) ■1,098,456 ▲ +283.9% vs prior |
| CASH & BANK ■532,860 bank ■277,007 + cash ■255,853 ▲ +158.8% vs prior | CASH RUNWAY 8.5 mo at ■62,548/mo burn ▲ +0.3 pts vs prior | NET WORKING CAPITAL ■486,059 Current Assets – Current Liabilities ▲ +230.7% vs prior | OVERDUE RECEIVABLES 79.7% ■335,379 ▼ -9.6 pts vs prior |

PROFITABILITY RATIOS

| Metric | Value | Metric | Value |
|----------------|-------|-------------------|---------|
| Gross Margin | 90.6% | EBIT Margin | 67.7% |
| EBITDA Margin | 67.7% | Net (PAT) Margin | 66.9% |
| Opex / Revenue | 22.9% | Interest Coverage | 1712.2x |

TOP ALERTS

| Severity | Period | Title | At risk |
|----------|---------|--|-------------|
| CRITICAL | 2026-02 | ■1.82L stuck with customers over 60 days | Rs. 182,100 |
| CRITICAL | 2025-11 | ■2.24L stuck with customers over 60 days | Rs. 224,201 |
| CRITICAL | 2025-11 | Customers take 88 days to pay you | Rs. 531,001 |
| 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 | 2025-10 | ■2.12L stuck with customers over 60 days | Rs. 212,401 |
| CRITICAL | 2025-12 | ■2.12L stuck with customers over 60 days | Rs. 212,401 |

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