

Acuere Consultancy

Executive Summary · November 2024 · vs vs Q4 FY2024-25 (Jan-Mar 2025) · Figures in Full

At a glance — Revenue **■282,500**, Net Profit **■25,946**, Cash Runway **1.1 mo.**

KEY METRICS

| | | | |
|---|--|--|--|
| NET REVENUE ■282,500 ▼ -18.1% vs prior | GROSS MARGIN 100.0% ■282,500 ▲ +40.6 pts vs prior | EBITDA ■25,946 9.2% margin ▲ +103.4% vs prior | NET PROFIT (PAT) ■25,946 ▲ +103.4% vs prior |
| CASH & BANK ■281,564 bank ■174,511 + cash ■107,053 ▲ +611.2% vs prior | CASH RUNWAY 1.1 mo at ■256,554/mo burn ▲ +1.0 pts vs prior | NET WORKING CAPITAL ■595,779 Current Assets – Current Liabilities ▲ +423.1% vs prior | OVERDUE RECEIVABLES 0.4% ■891 ▼ -99.6 pts vs prior |

PROFITABILITY RATIOS

| Metric | Value | Metric | Value |
|----------------|--------|-------------------|-------|
| Gross Margin | 100.0% | EBIT Margin | 9.2% |
| EBITDA Margin | 9.2% | Net (PAT) Margin | 9.2% |
| Opex / Revenue | 90.8% | Interest Coverage | n/a |

TOP ALERTS

| Severity | Period | Title | At risk |
|----------|---------|---|-------------|
| 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 |
| WARNING | 2024-11 | 15 customers gone quiet — ■5.62L at risk | Rs. 562,500 |
| SUCCESS | 2024-11 | Portfolio is well diversified (35 customers) | |
| SUCCESS | 2024-11 | Revenue up 22.8% vs 2024-10 | |

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