

# Acuere Consultancy

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

**At a glance** — Revenue **■2,282,167**, Net Profit **■64,143**, Cash Runway **0.2 mo.**

## KEY METRICS

|  |   |   |  |
|--|---|---|--|
| <b>NET REVENUE</b><br><b>■2,282,167</b><br>▲ +561.5% vs prior                              | <b>GROSS MARGIN</b><br><b>93.9%</b><br>■2,142,167<br>▲ +34.4 pts vs prior         | <b>EBITDA</b><br><b>■69,011</b><br>3.0% margin<br>▲ +109.0% vs prior                                      | <b>NET PROFIT (PAT)</b><br><b>■64,143</b><br>▲ +108.4% vs prior                |
| <b>CASH &amp; BANK</b><br><b>■39,591</b><br>bank ■32,738 + cash ■6,853<br>— +0.0% vs prior | <b>CASH RUNWAY</b><br><b>0.2 mo</b><br>at ■172,763/mo burn<br>▲ +0.1 pts vs prior | <b>NET WORKING CAPITAL</b><br><b>■113,889</b><br>Current Assets – Current Liabilities<br>— +0.0% vs prior | <b>OVERDUE RECEIVABLES</b><br><b>100.0%</b><br>■304,201<br>— +0.0 pts vs prior |

## PROFITABILITY RATIOS

| Metric         | Value | Metric            | Value |
|----------------|-------|-------------------|-------|
| Gross Margin   | 93.9% | EBIT Margin       | 2.8%  |
| EBITDA Margin  | 3.0%  | Net (PAT) Margin  | 2.8%  |
| Opex / Revenue | 90.8% | Interest Coverage | 86.6x |

## TOP ALERTS

| Severity | Period  | Title   | At risk     |
|----------|---------|---|-------------|
| CRITICAL | 2024-04 | ■1.08L stuck with customers over 60 days            | Rs. 108,401 |
| 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 |

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