

Acuere Consultancy

Executive Summary · August 2024 · vs vs Q4 FY2025-26 (Jan-Mar 2026) · Figures in Full

At a glance — Revenue **■383,000**, Net Profit **■145,800**, Cash Runway **1.3 mo.**

KEY METRICS

| | | | |
|---|---|---|---|
| NET REVENUE ■383,000 ▼ -58.5% vs prior | GROSS MARGIN 100.0% ■383,000 ▲ +16.8 pts vs prior | EBITDA ■145,800 38.1% margin ▼ -72.0% vs prior | NET PROFIT (PAT) ■145,800 ▼ -71.3% vs prior |
| CASH & BANK ■298,344 bank ■191,291 + cash ■107,053 ▼ -44.0% vs prior | CASH RUNWAY 1.3 mo at ■237,200/mo burn ▼ -5.2 pts vs prior | NET WORKING CAPITAL ■467,911 Current Assets – Current Liabilities ▼ -3.7% vs prior | OVERDUE RECEIVABLES 0.3% ■638 ▼ -79.4 pts vs prior |

PROFITABILITY RATIOS

| Metric | Value | Metric | Value |
|----------------|--------|-------------------|-------|
| Gross Margin | 100.0% | EBIT Margin | 38.1% |
| EBITDA Margin | 38.1% | Net (PAT) Margin | 38.1% |
| Opex / Revenue | 61.9% | Interest Coverage | n/a |

TOP ALERTS

| Severity | Period | Title | At risk |
|----------|---------|--|-------------|
| CRITICAL | 2024-08 | Cash runway only 1.3 months | Rs. 711,600 |
| CRITICAL | 2024-08 | ■1.98L stuck with customers over 60 days | Rs. 197,801 |
| CRITICAL | 2024-08 | EBITDA margin dropped 36.0 pts (from 74.1% to 38.1%) | Rs. 138,071 |
| WARNING | 2024-08 | 15 customers gone quiet — ■5.62L at risk | Rs. 562,500 |
| SUCCESS | 2024-08 | Portfolio is well diversified (35 customers) | |
| SUCCESS | 2024-08 | Revenue up 125.3% vs 2024-07 | |

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