

Acuere Consultancy

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

At a glance — Revenue **■2,833,500**, Net Profit **■2,063,131**, Cash Runway **11.9 mo.**

KEY METRICS

| | | | |
|--|---|---|---|
| NET REVENUE ■2,833,500 ▲ +206.8% vs prior | GROSS MARGIN 92.1% ■2,610,508 ▲ +8.9 pts vs prior | EBITDA ■2,071,423 73.1% margin ▲ +298.4% vs prior | NET PROFIT (PAT) ■2,063,131 ▲ +306.8% vs prior |
| CASH & BANK ■532,860 bank ■277,007 + cash ■255,853 — +0.0% vs prior | CASH RUNWAY 11.9 mo at ■44,924/mo burn ▲ +5.4 pts vs prior | NET WORKING CAPITAL ■486,059 Current Assets – Current Liabilities — +0.0% vs prior | OVERDUE RECEIVABLES 79.7% ■335,379 — +0.0 pts vs prior |

PROFITABILITY RATIOS

| Metric | Value | Metric | Value |
|----------------|-------|-------------------|---------|
| Gross Margin | 92.1% | EBIT Margin | 73.1% |
| EBITDA Margin | 73.1% | Net (PAT) Margin | 72.8% |
| Opex / Revenue | 19.0% | Interest Coverage | 3191.7x |

TOP ALERTS

| Severity | Period | Title | At risk |
|----------|---------|--|-------------|
| CRITICAL | 2026-02 | ■1.82L stuck with customers over 60 days | Rs. 182,100 |
| CRITICAL | 2025-05 | ■1.89L stuck with customers over 60 days | Rs. 188,801 |
| 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 |

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