

Acuere Consultancy

Executive Summary · H2 FY2024-25 (Oct 2024-Mar 2025) · Figures in Full

At a glance — Revenue **■1,072,500**, Net Profit (**■409,601**), Cash Runway **0.2 mo.**

KEY METRICS

| | | | |
|---|---|--|--|
| NET REVENUE ■1,072,500 | GROSS MARGIN 86.9% <small>■932,500</small> | EBITDA (■404,733) <small>-37.7% margin</small> | NET PROFIT (PAT) (■409,601) |
| CASH & BANK ■39,591 <small>bank ■32,738 + cash ■6,853</small> | CASH RUNWAY 0.2 mo <small>at ■222,872/mo burn</small> | NET WORKING CAPITAL ■113,889 <small>Current Assets – Current Liabilities</small> | OVERDUE RECEIVABLES 100.0% <small>■304,201</small> |

PROFITABILITY RATIOS

| Metric | Value | Metric | Value |
|----------------|--------|-------------------|---------|
| Gross Margin | 86.9% | EBIT Margin | -38.1% |
| EBITDA Margin | -37.7% | Net (PAT) Margin | -38.2% |
| Opex / Revenue | 124.7% | Interest Coverage | -545.9x |

TOP ALERTS

| Severity | Period | Title | At risk |
|----------|---------|---|-------------|
| 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 |
| CRITICAL | 2024-12 | ■3.84L stuck with customers over 60 days | Rs. 383,501 |

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