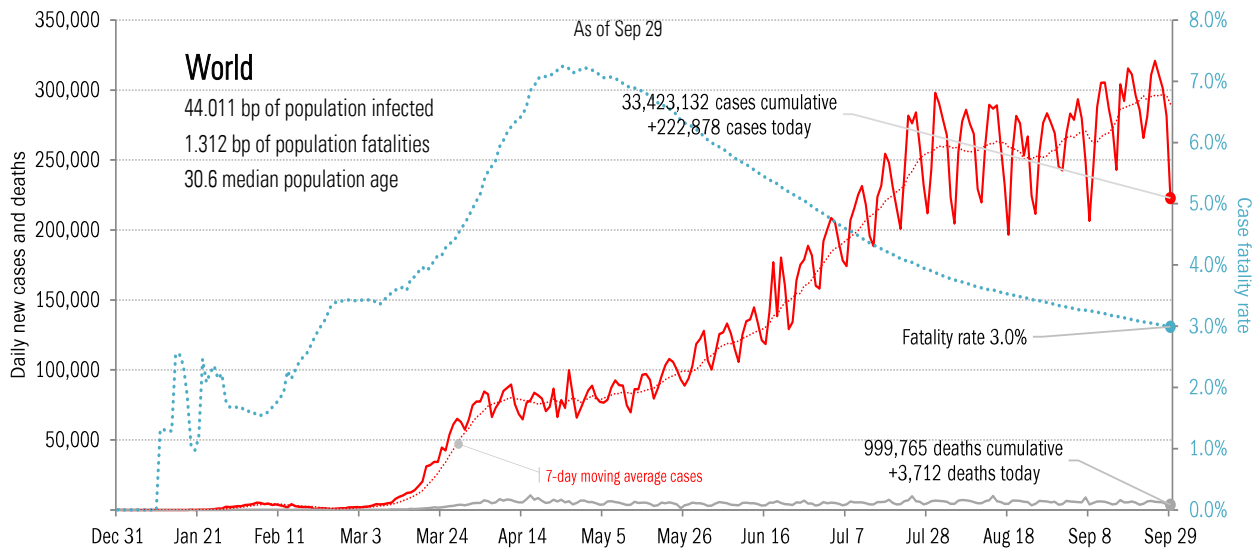
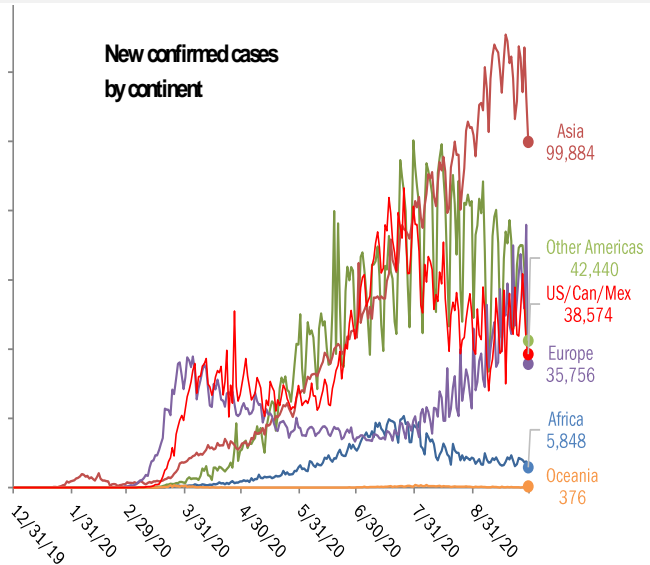


Data Insights: Covid-2019 Monitor

Tuesday, September 29, 2020

The global scorecard

The worst ten countries			
New cases		New Deaths	
India	+70,589	India	+776
US	+36,741	Argentina	+364
Brazil	+13,155	Brazil	+317
Spain	+12,272	US	+314
Argentina	+11,807	Iran	+190
Russia	+8,135	South_Africa	+188
Colombia	+5,147	Mexico	+173
Iraq	+4,116	Colombia	+153
France	+4,070	Indonesia	+87
UK	+4,044	France	+81
+170,076		+2,643	
World	+222,878	World	+3,712
Top ten	76%	Top ten	71%



Source: [ECDC](#), TrendMacro calculations

For more information contact us:

Donald Luskin: 312 273 6766 don@trendmacro.com
 Thomas Demas: 704 552 3625 tdemas@trendmacro.com

The US scorecard

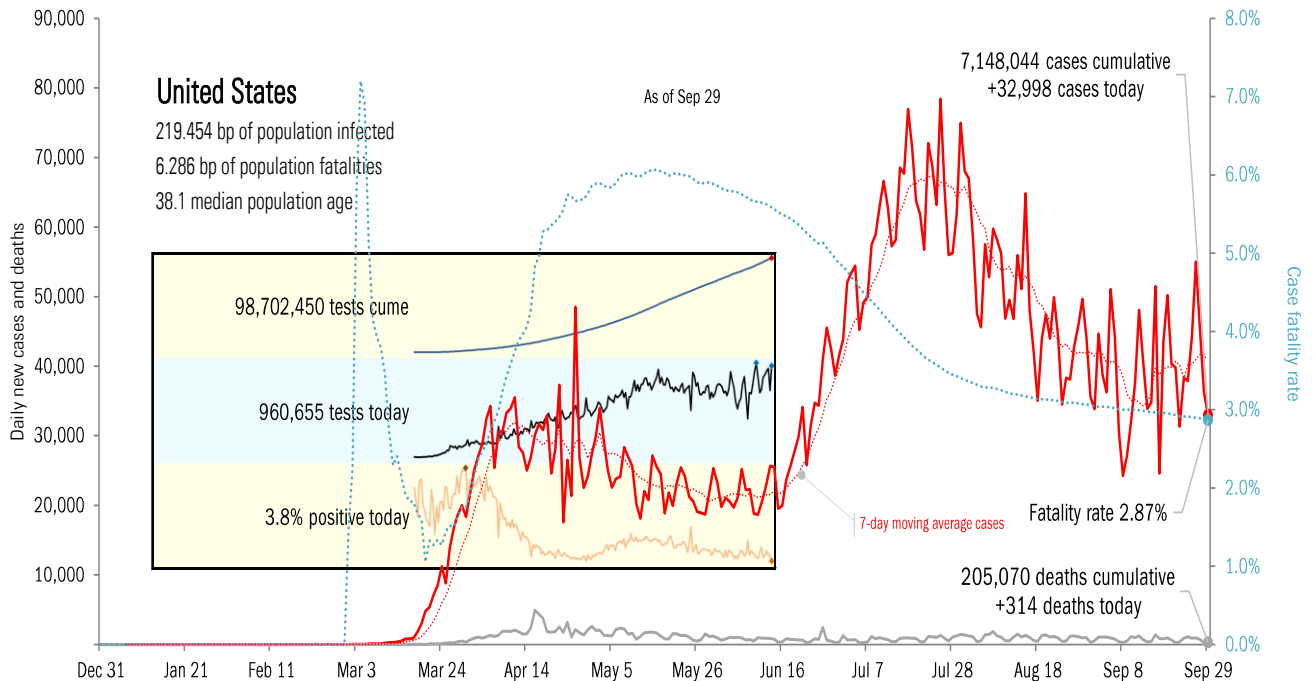
National and state-by-state data do not line up because of different sources

The ten worst US states

New cases		New Deaths		New in hospital		Curre cases		Curre deaths		Curre in hospital	
TX	+4,611	AR	+21	AL	+239	CA	805,263	NY	25,468	NY	89,995
CA	+2,955	CA	+21	MS	+237	TX	739,743	NJ	16,107	FL	44,103
KS	+2,037	ND	+21	OH	+91	FL	701,302	CA	15,608	GA	28,197
WI	+1,739	GA	+15	FL	+73	NY	456,460	TX	15,533	NJ	23,338
IL	+1,709	LA	+15	VA	+62	GA	315,281	FL	14,207	AZ	22,019
OK	+1,684	IL	+13	IN	+58	IL	292,128	MA	9,415	VA	18,373
MI	+1,329	VA	+13	MN	+53	AZ	217,510	IL	8,858	AL	17,091
MO	+1,280	NY	+12	WI	+47	NC	208,248	PA	8,107	MD	15,428
FR	+1,118	TN	+12	OR	+42	NJ	204,107	MI	7,051	CH	15,307
CH	+993	IN	+11	TN	+42	TN	193,732	GA	6,961	IN	12,654
+19,455		+154		+944		4,133,774		127,315		286,505	
All states	+36,741	All states	+260	All states	+1,241	All states	7,117,251	All states	197,129	All states	405,326
Top ten	53%	Top ten	59%	Top ten	76%	Top ten	58%	Top ten	65%	Top ten	71%

Five most improved US states

Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most recoveries	
TN	-1,367	CA	-34	VA	-70	NC	+8,000
FL	-1,144	TX	-26	CO	-38	TX	+5,031
CA	-1,116	GA	-17	SD	-24	MS	+4,410
LA	-683	NJ	-8	AR	-20	PA	+1,307
WI	-508	FL	-7	IN	-17	WI	+1,214



Source: States and test data [Covid Tracking Project](#), US data [ECDC](#), TrendMacro calculations

Recommended reading

[China's Global Lockdown Propaganda Campaign](#)

Michael P. Senger
Table
September 15, 2020

[Congress's Covid Income Redistribution](#)

Wall Street Journal
September 28, 2020

[Redfield voices alarm over influence of Trump's new coronavirus task force adviser](#)

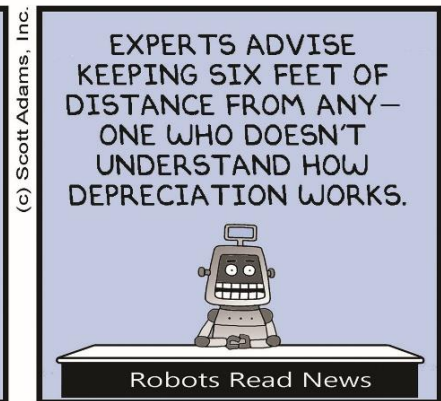
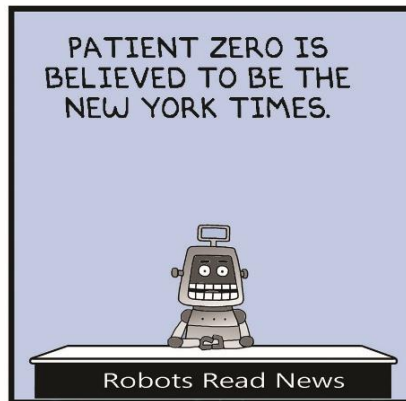
Monica Alba
NBC News
September 28, 2020

[Many first-time buyers squeezed out of UK housing market](#)

George Russell, Alice Woodhouse, Sarah Provan, Adam Samson, Naomi Rovnick, Harry Dempsey
Financial Times
September 28, 2020

Meme of day

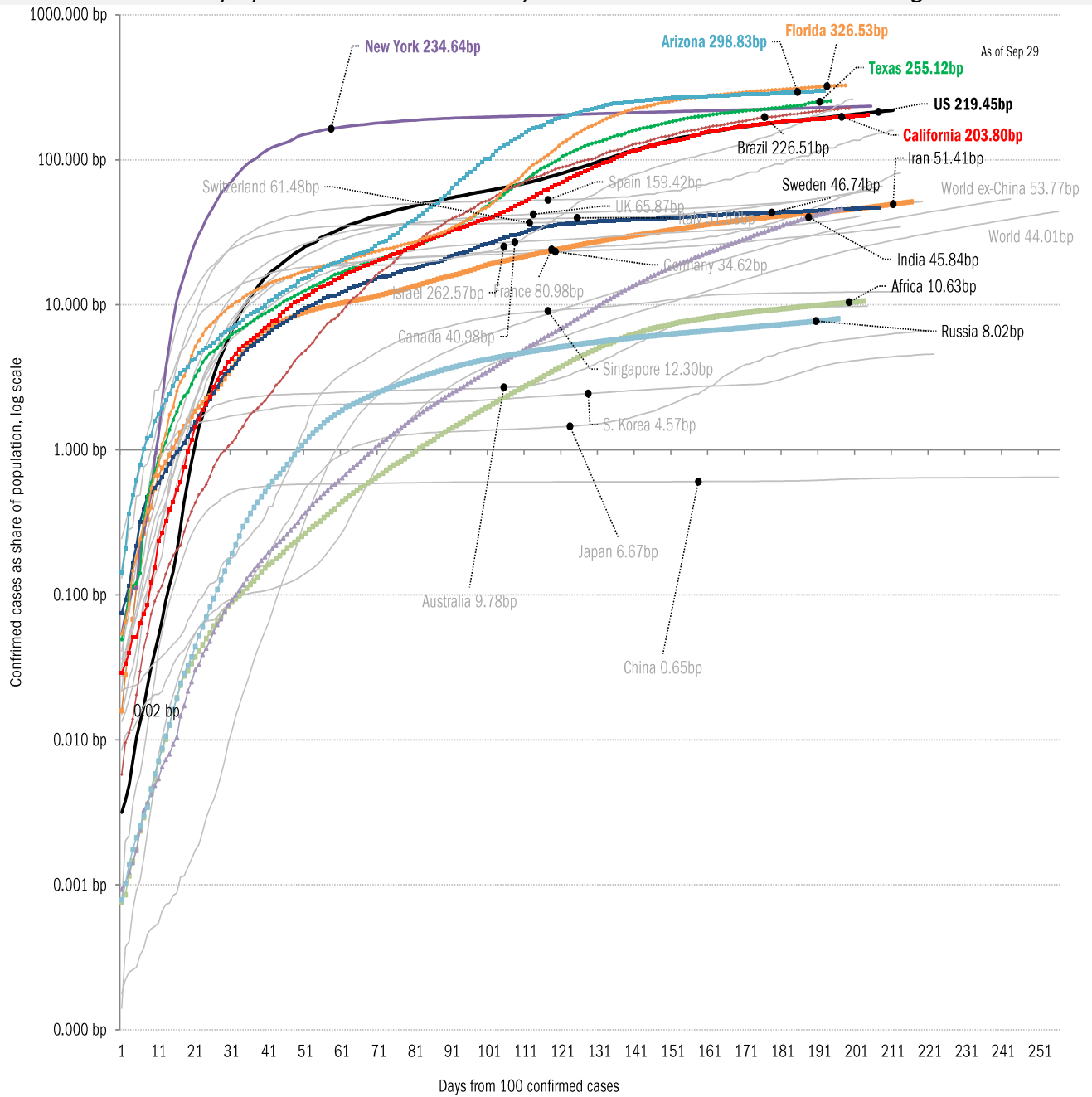
Robots Read News: An Occasional Web Comic by Scott Adams



(c) Scott Adams, Inc.

Source: Our beloved clients, and [Power Line blog "The Week in Pictures"](#)

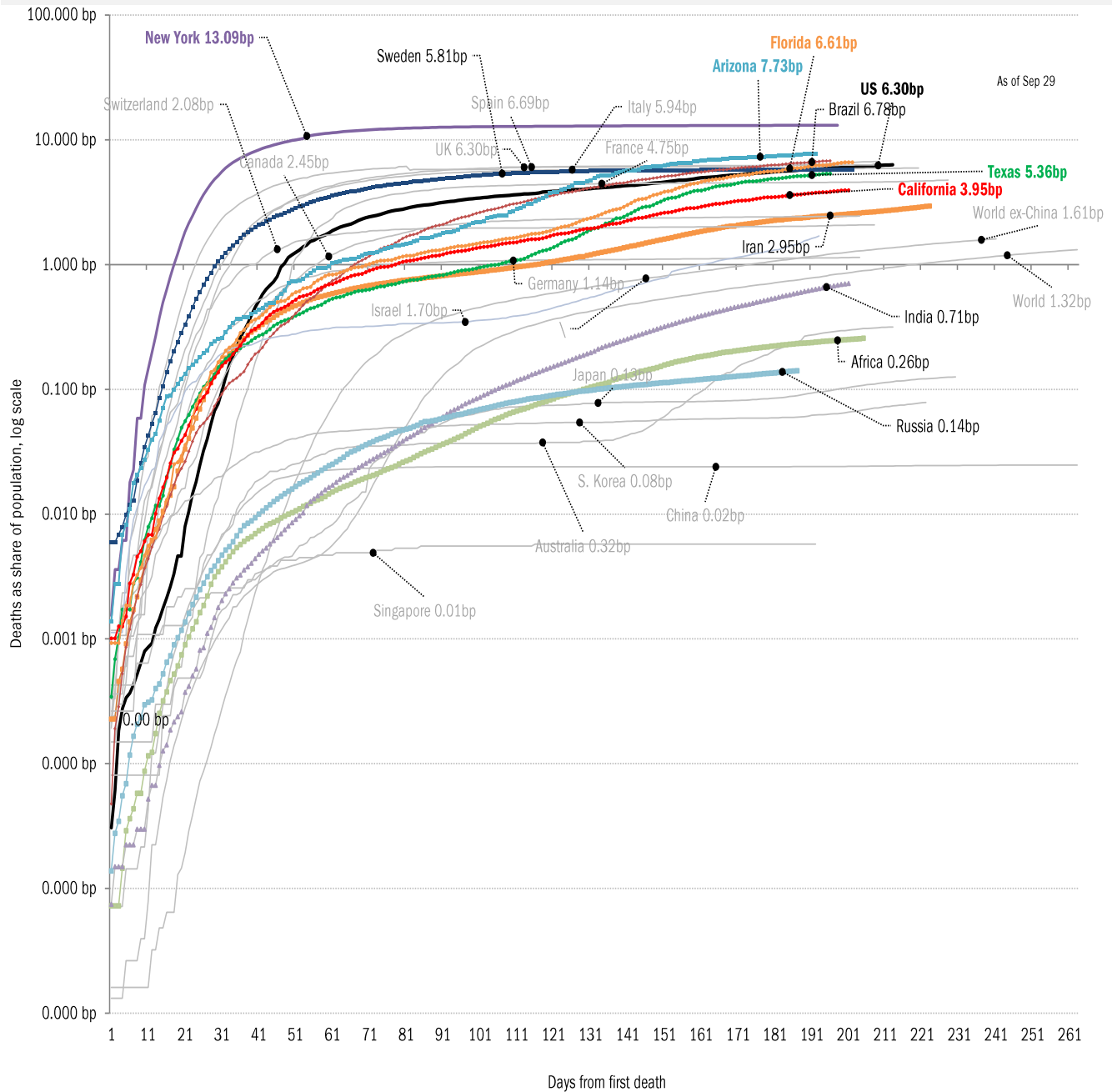
The coronavirus case accelerometer... tracking the world's infection curves
Share of infected population from first day with 100 confirmed cases, log scale



Source: [ECDC](#), TrendMacro calculations

The coronavirus mortality accelerometer ... tracking the world's fatality curves

Share of deceased population from day of first fatality

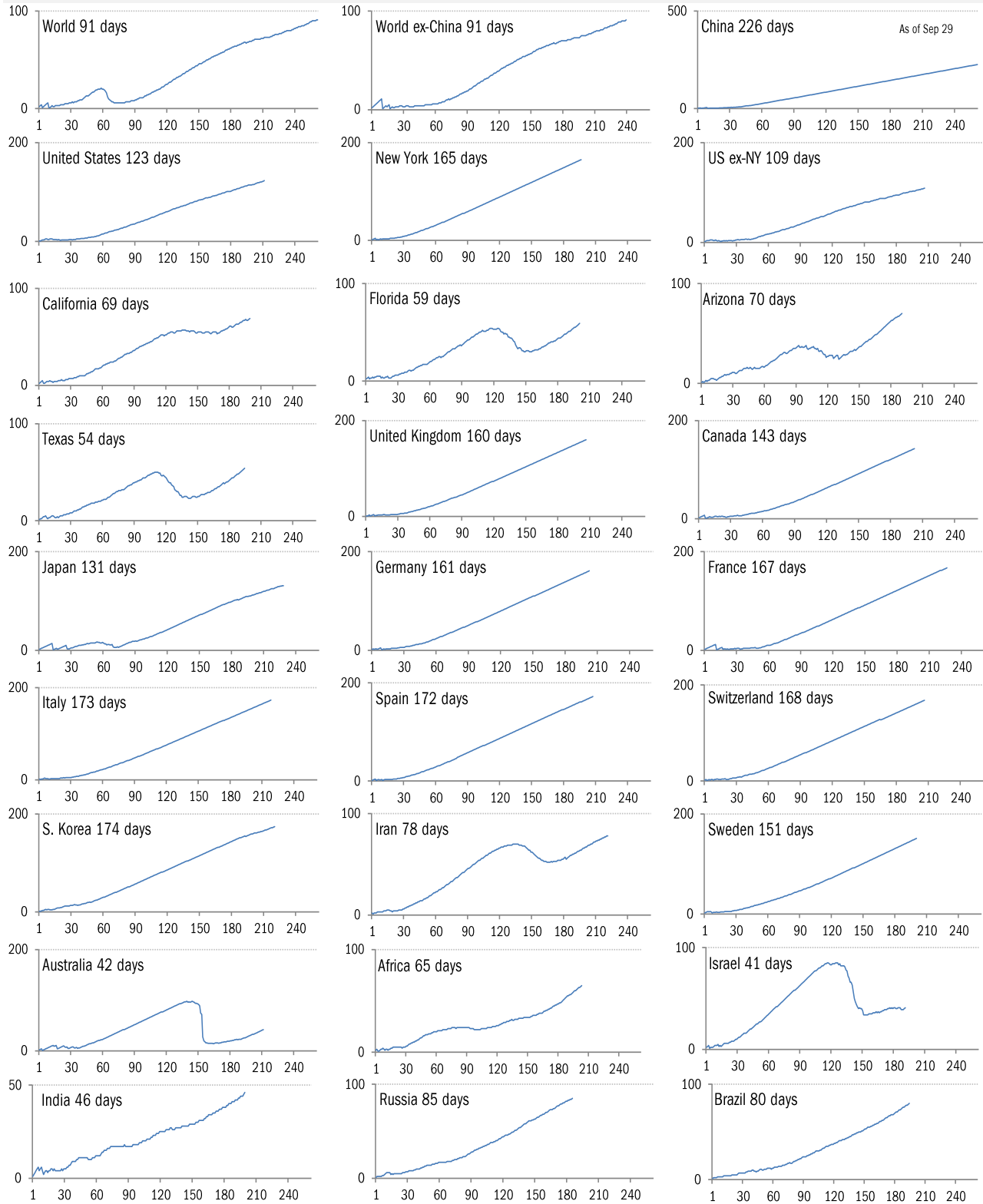


Source: [ECDC](#), TrendMacro calculations

Our most reliable evidence of slowing exponential growth of Covid-2019

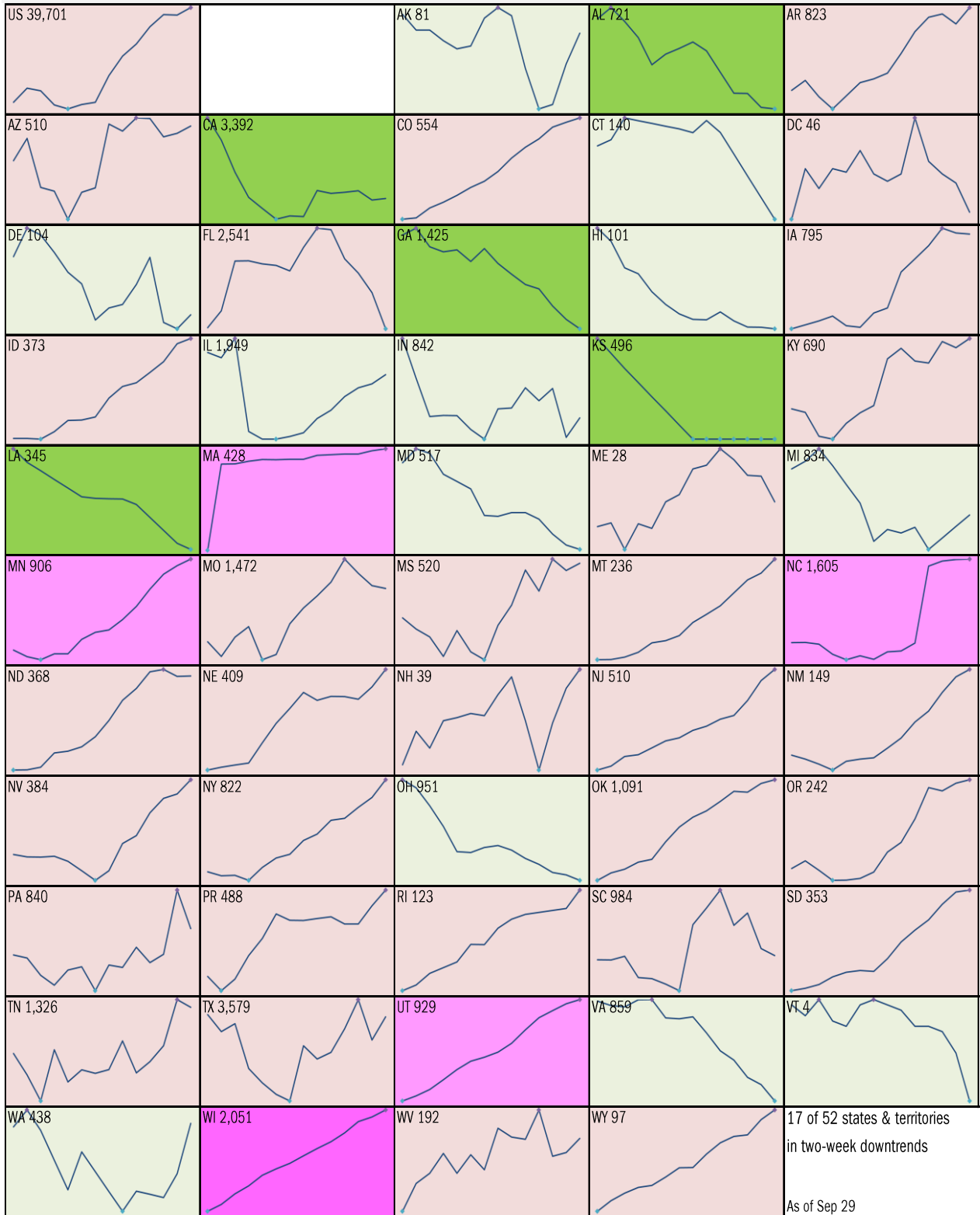
Vertical: days to double deaths Horizontal: days from first death

Flat indicates exponential spread Declining indicates supra-exponential spread Rising indicates sub-exponential spread



Source: [ECDC](#), TrendMacro calculations

Requirement to [Open Up America Again](#): 14-day "downward trajectory" in new cases
 14-day moving average, last 14 days *Most recent value displayed* ● High ● Low
 ■ Downward trajectory ■ Five best ■ Upward trajectory ■ Five worst



Source: [Covid Tracking Project](#), TrendMacro calculations

Alt requirement to [Open Up America Again](#): 14-day "downward trajectory" in pos tests

14-day moving average, last 14 days Most recent value displayed ● High ● Low

■ Downward trajectory ■ Five best ■ Upward trajectory ■ Five worst



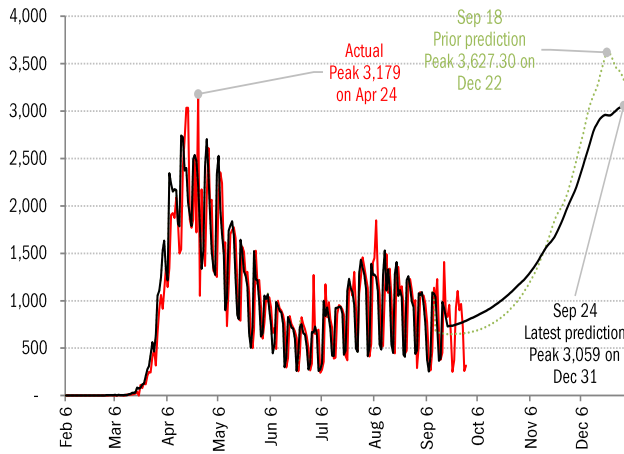
Source: [Covid Tracking Project](#), TrendMacro calculations

Reality-checking the models: actuals versus [IHME](#) predictions

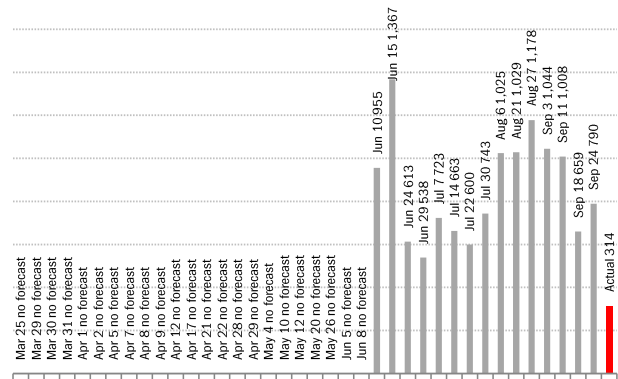
New daily fatalities

As of Sep 29

Actual versus first, highest, lowest and latest model mean predictions

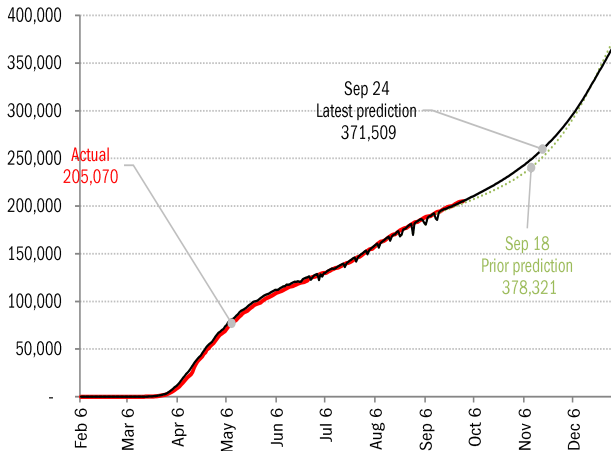


For this day, versus all model mean predictions

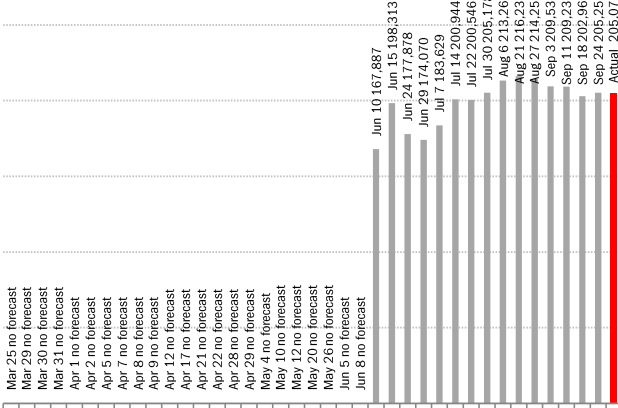


Cumulative fatalities

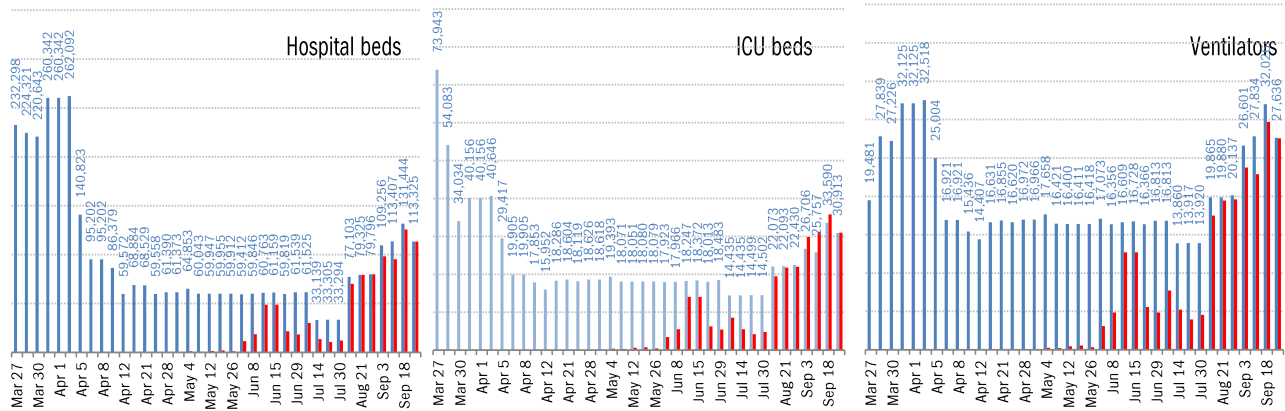
Actual versus first, highest, lowest and latest model mean predictions



For this day, versus all model mean predictions

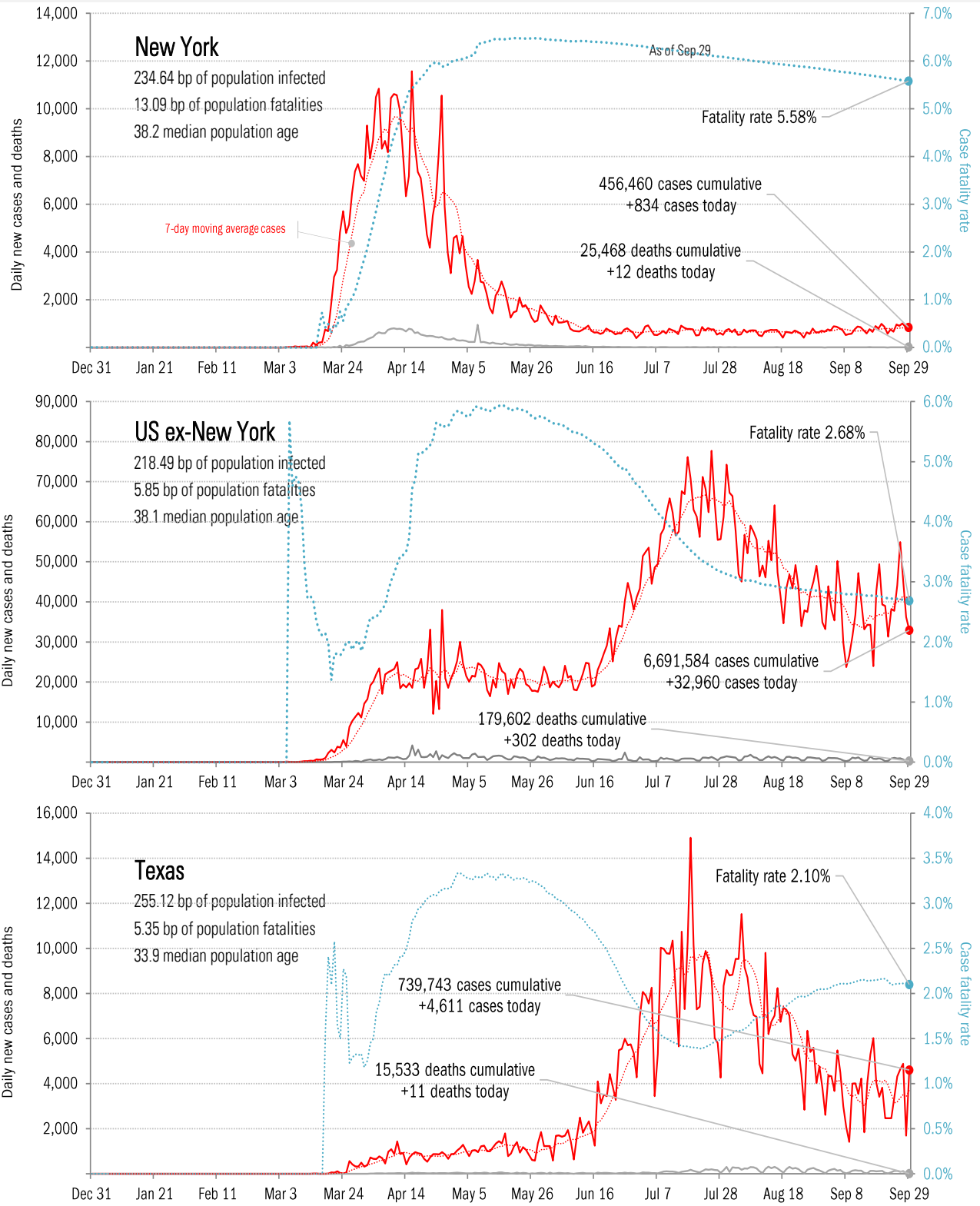


Healthcare system stress, **peak** and **ultimate** estimated at each model revision



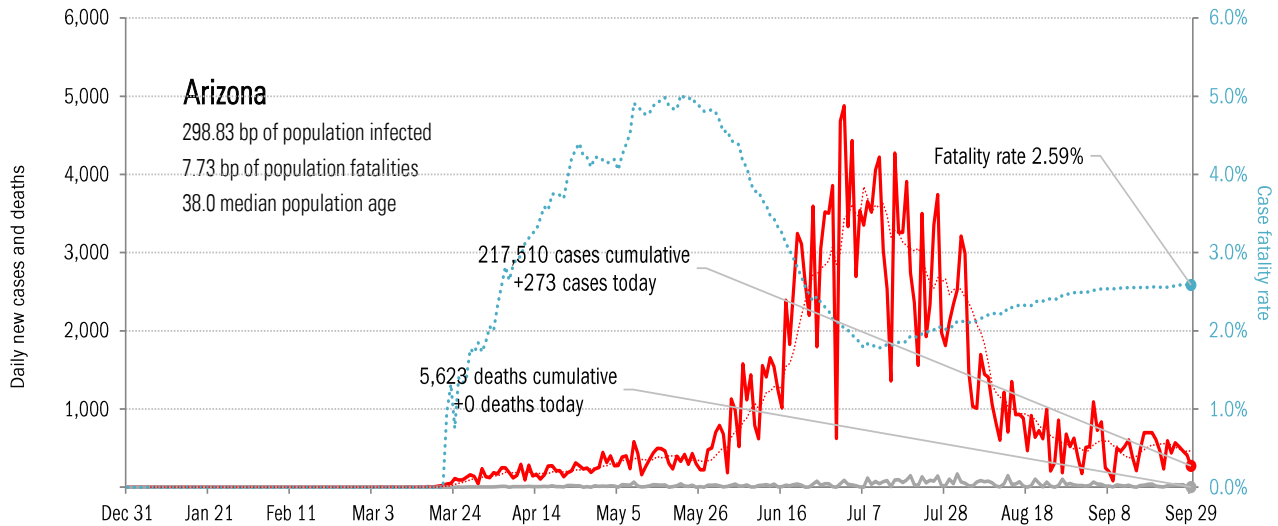
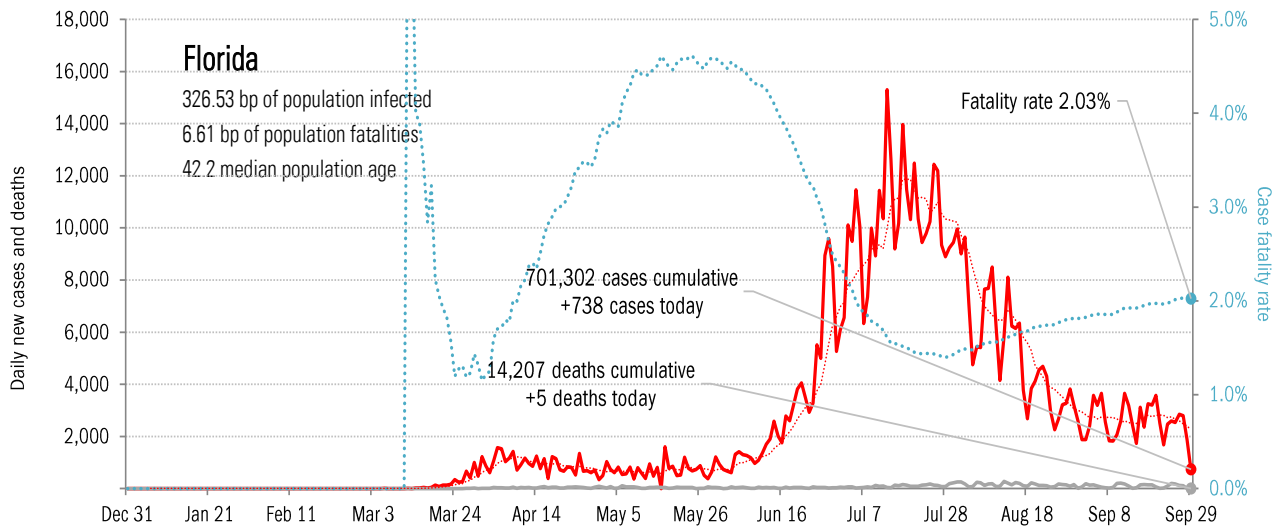
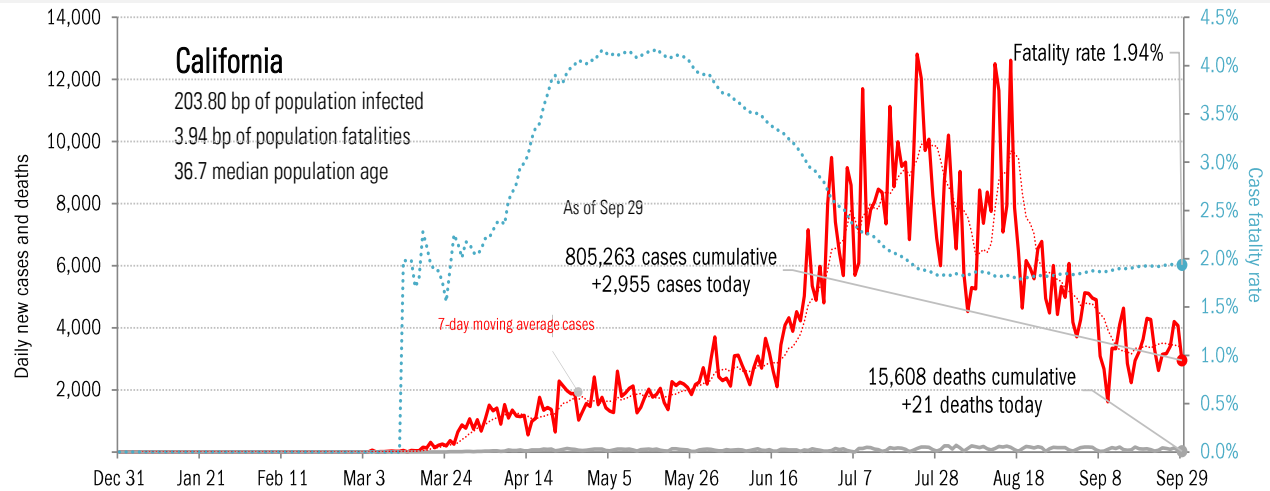
Source: [ECDC](#), [IHME](#), TrendMacro calculations

From Ground Zero to the Rio Grande



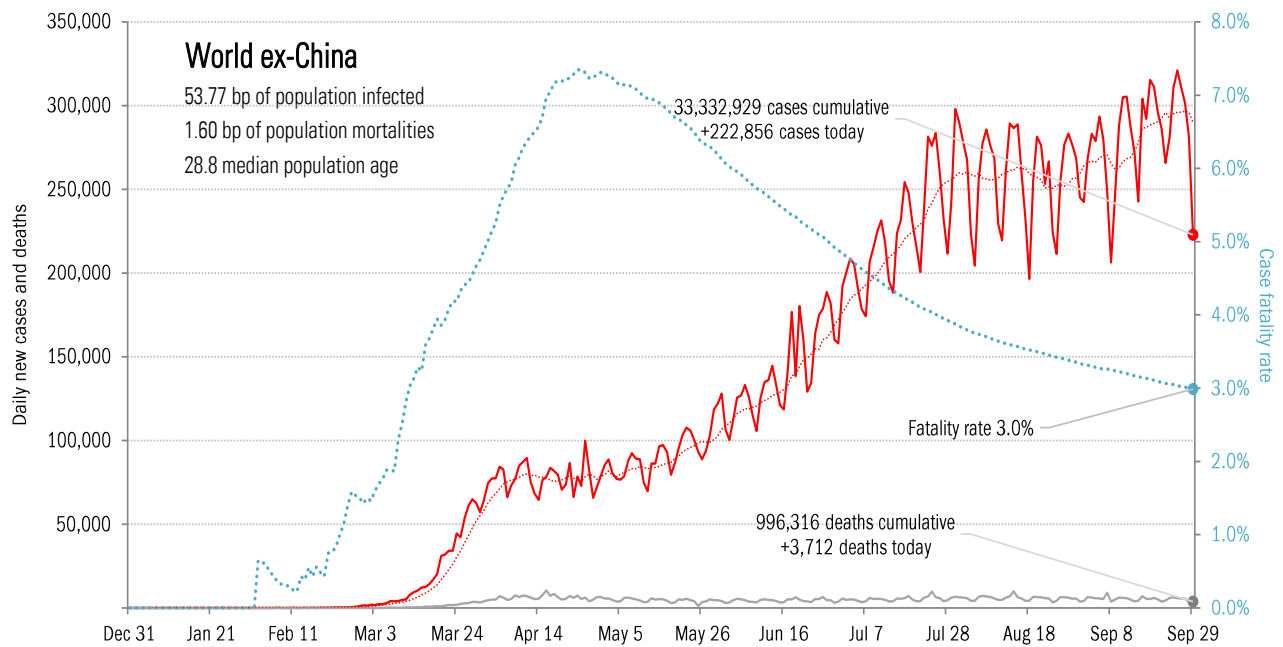
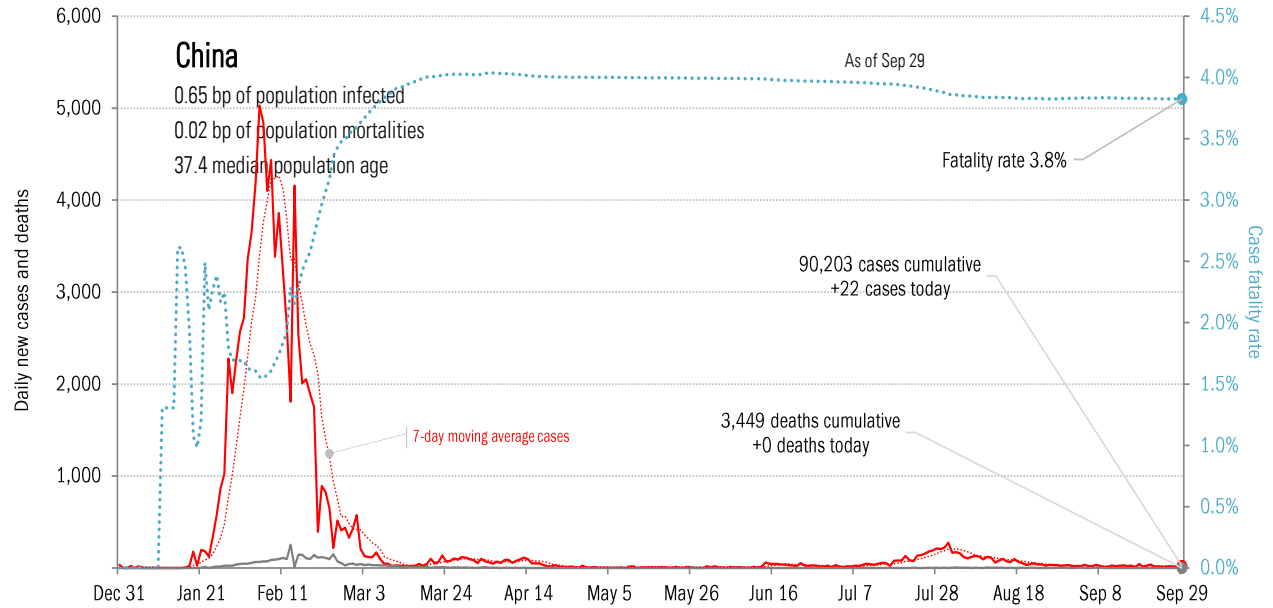
Source: [ECDC](#), TrendMacro calculations

The sun-belt hot-spot states (other than Texas)



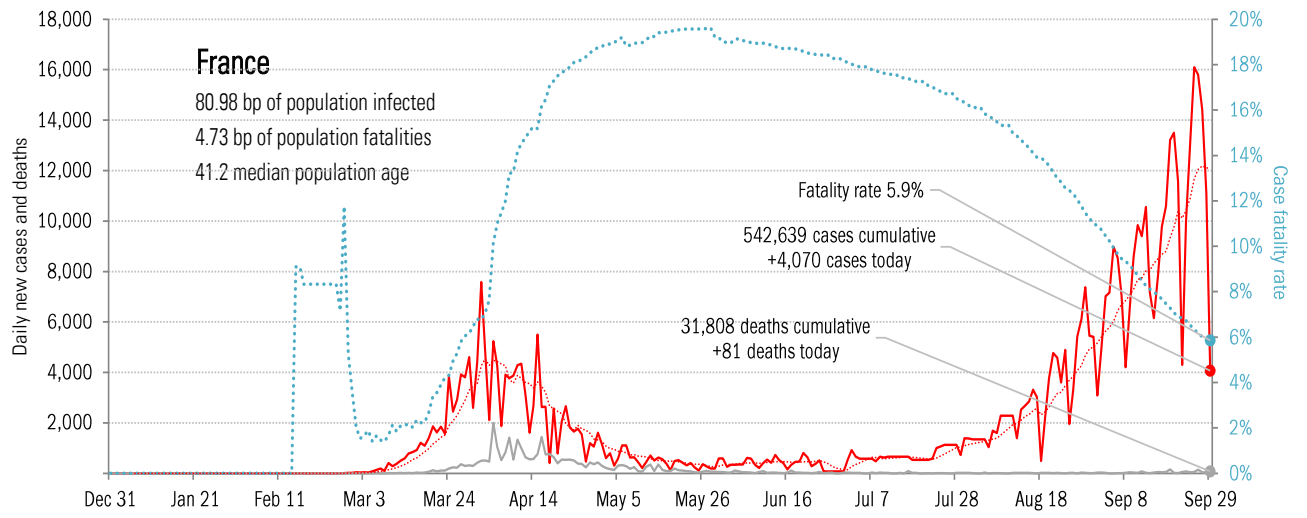
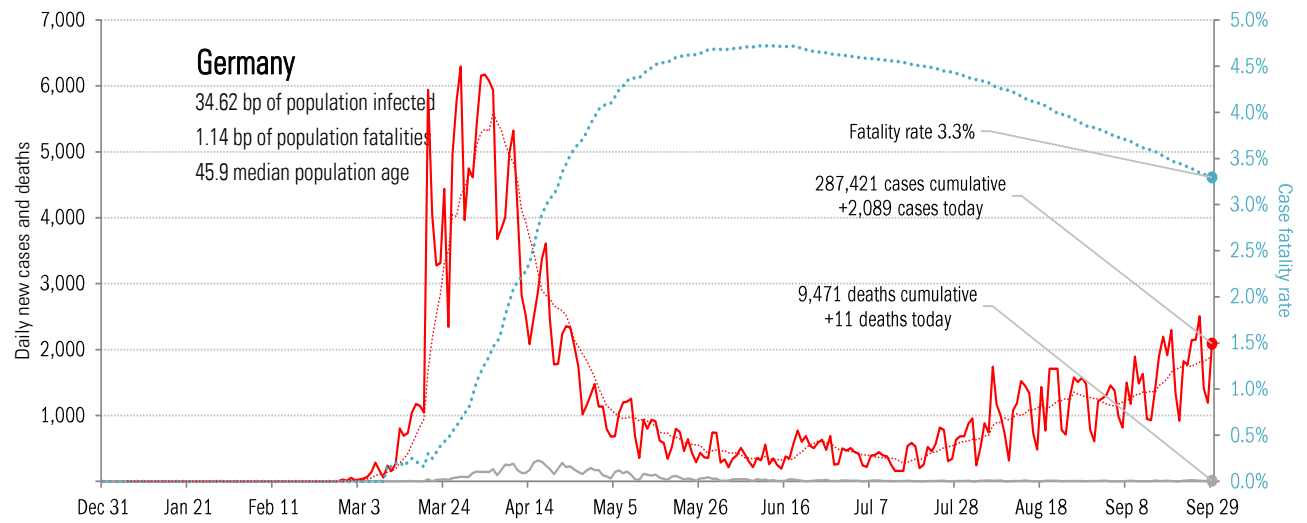
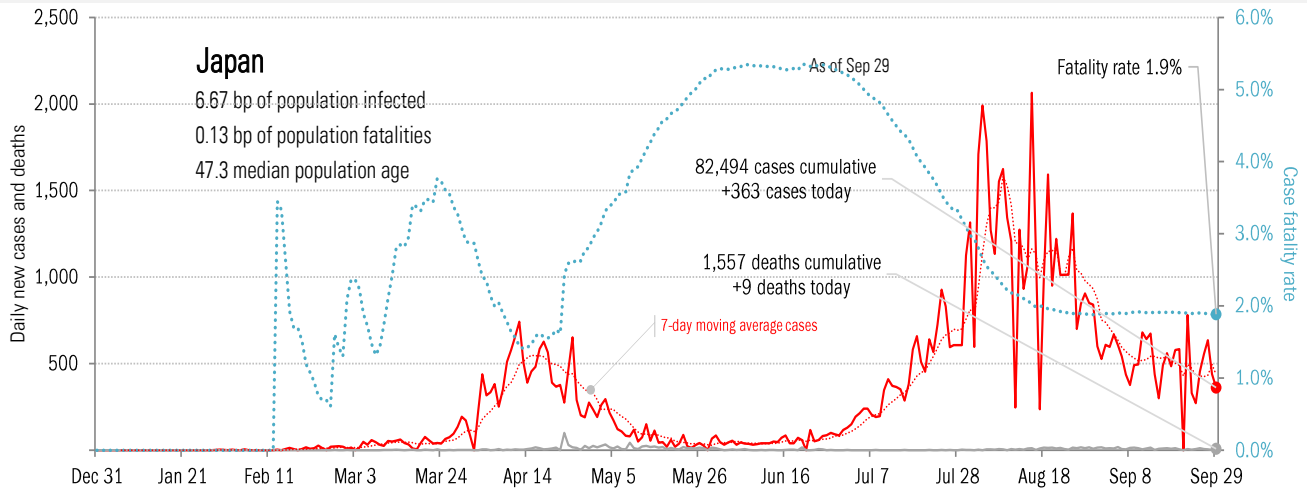
Source: [ECDC](#), TrendMacro calculations

Patient zero... and then everyone else



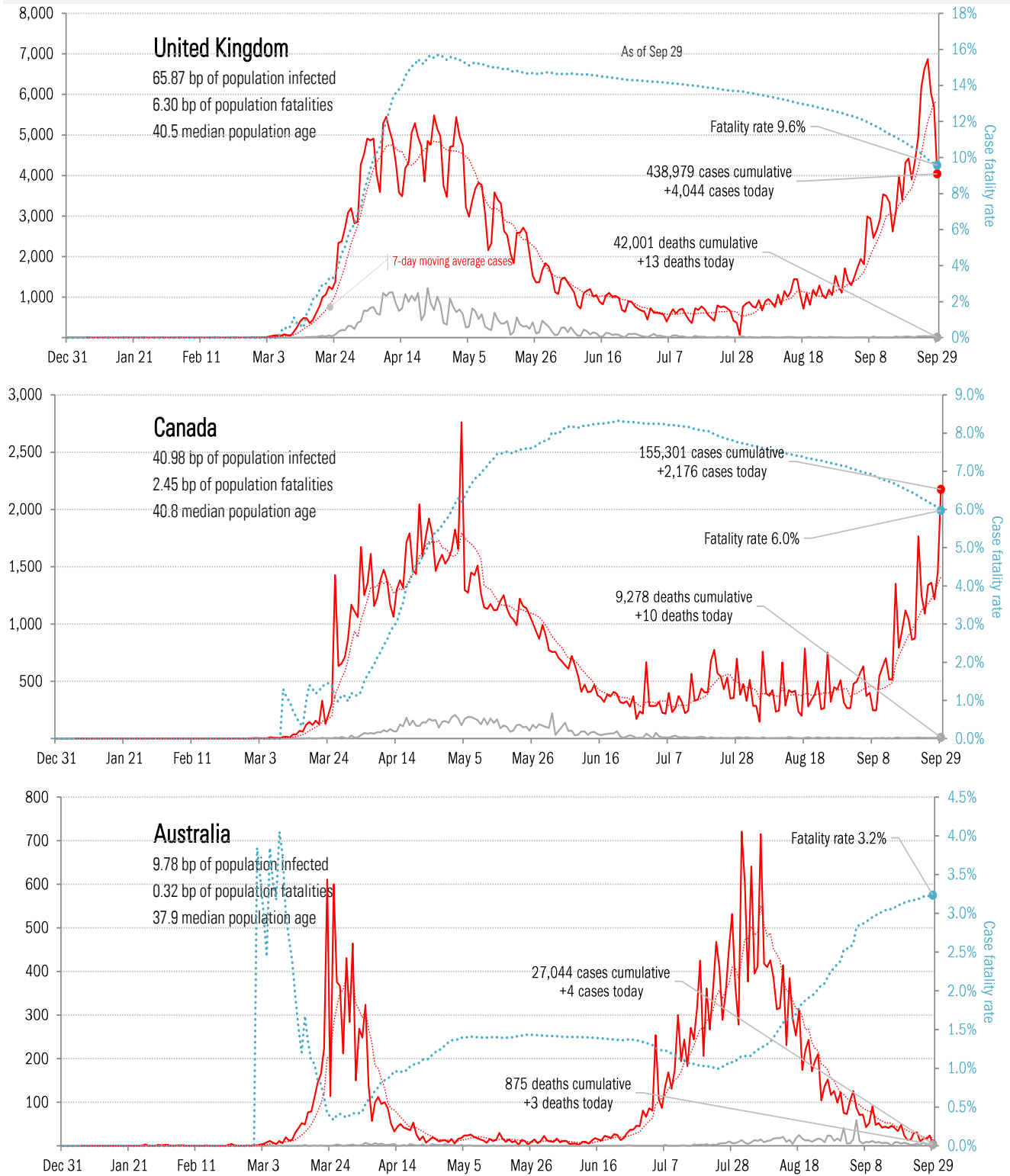
Source: [ECDC](#), TrendMacro calculations

Impact in the largest economies



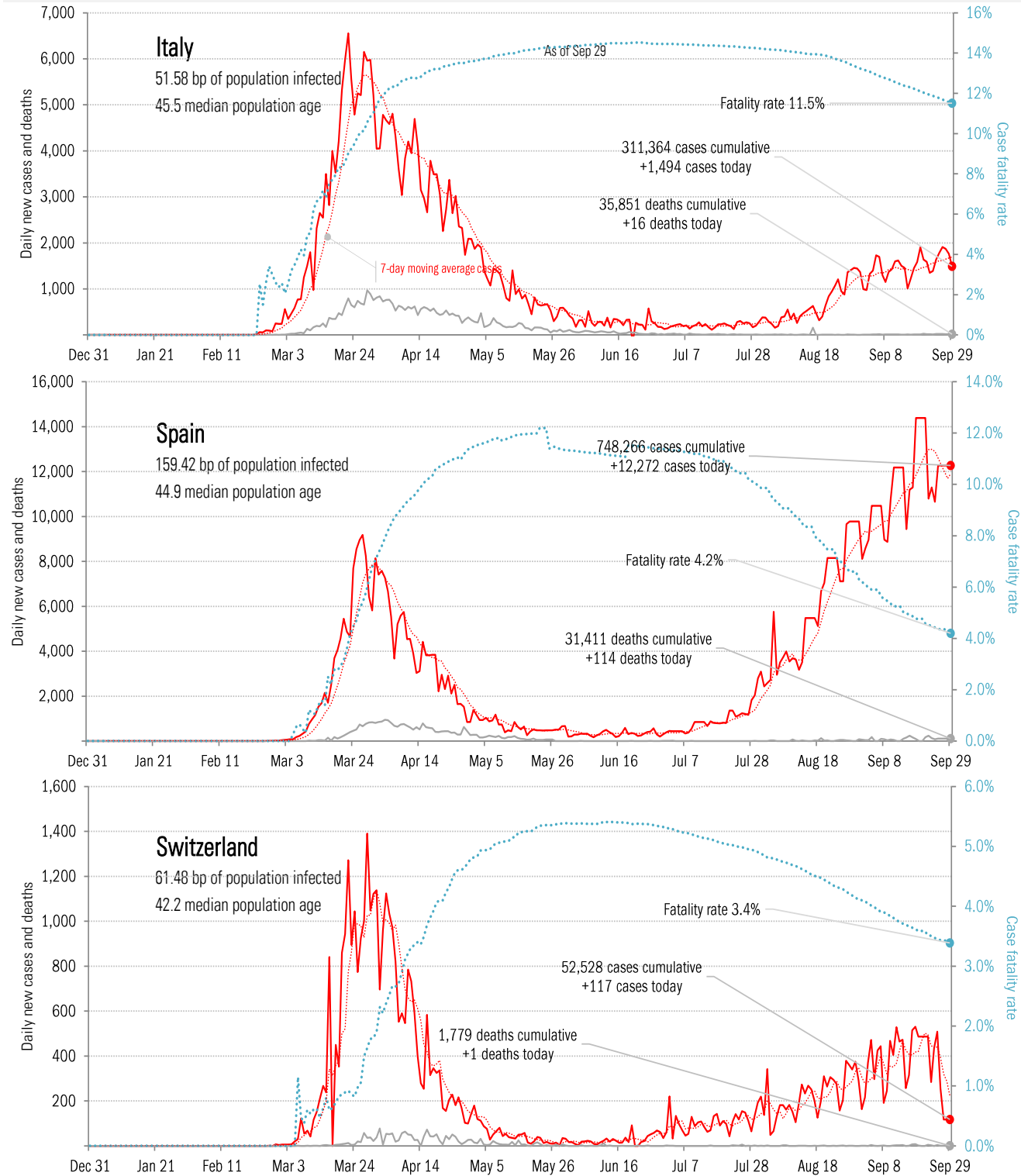
Source: [ECDC](#), TrendMacro calculations

Impact in The Anglosphere



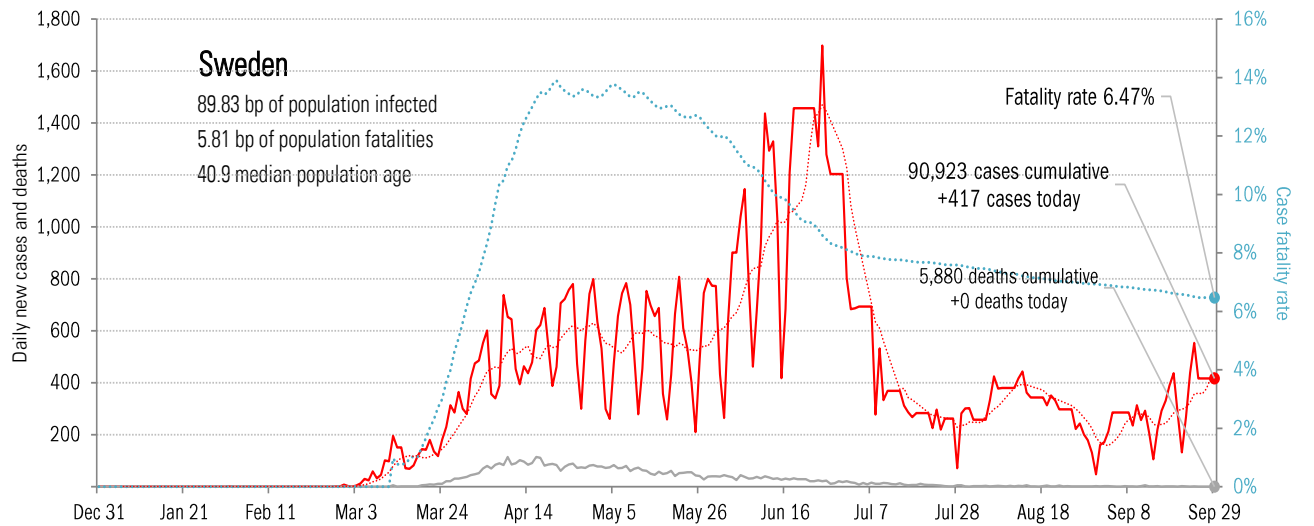
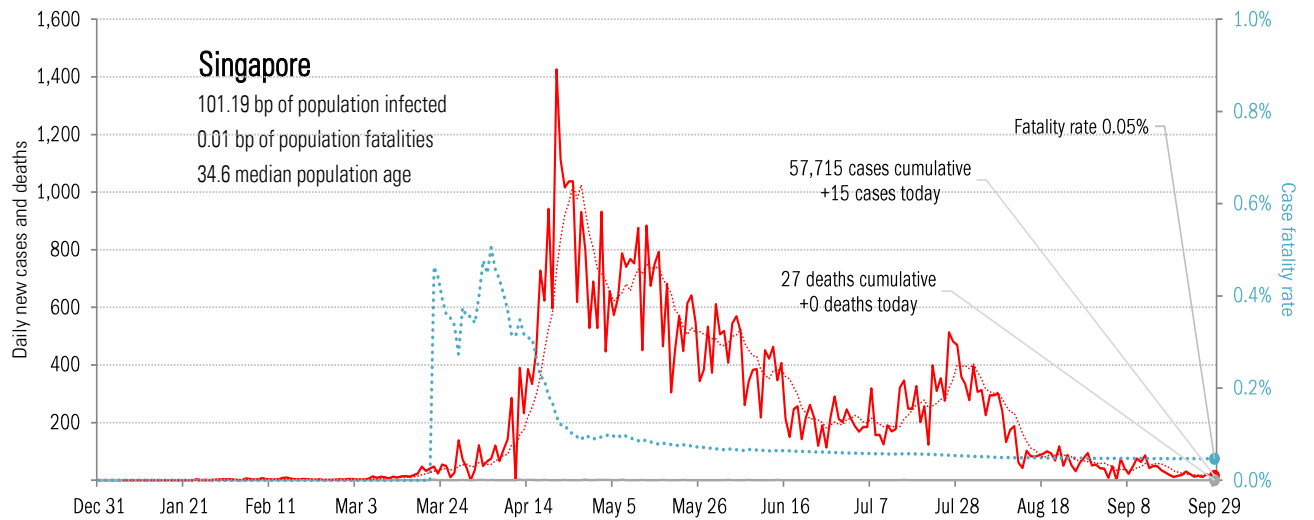
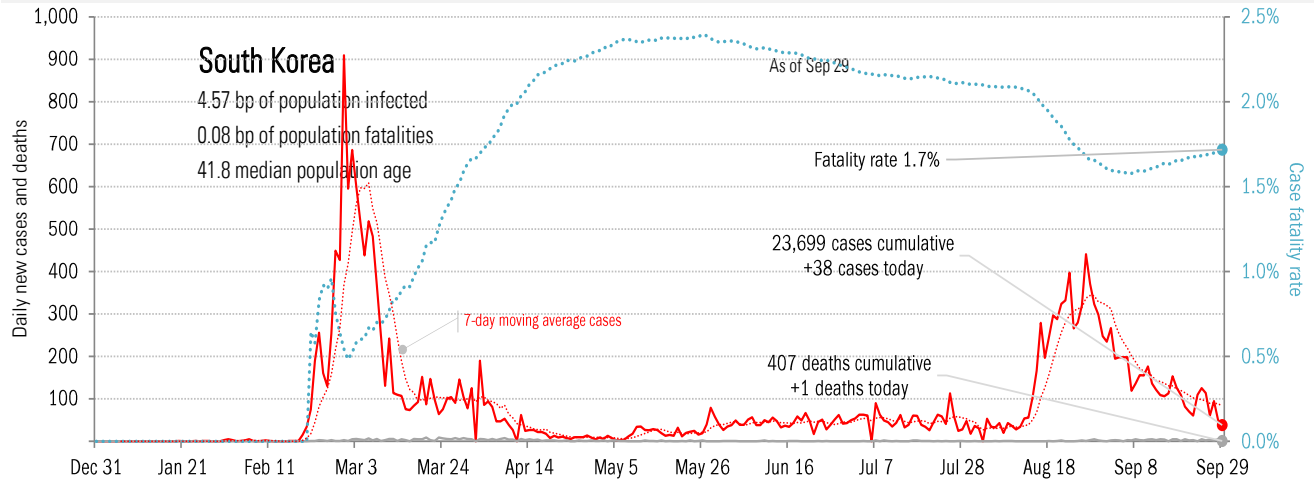
Source: [ECDC](#), TrendMacro calculations

Impact in continental Europe



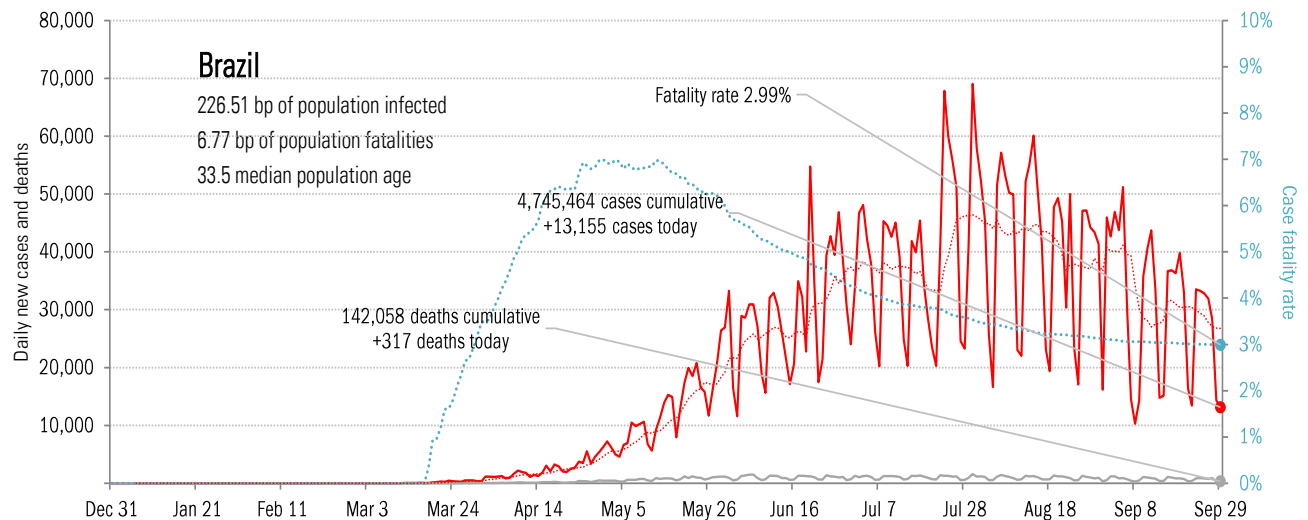
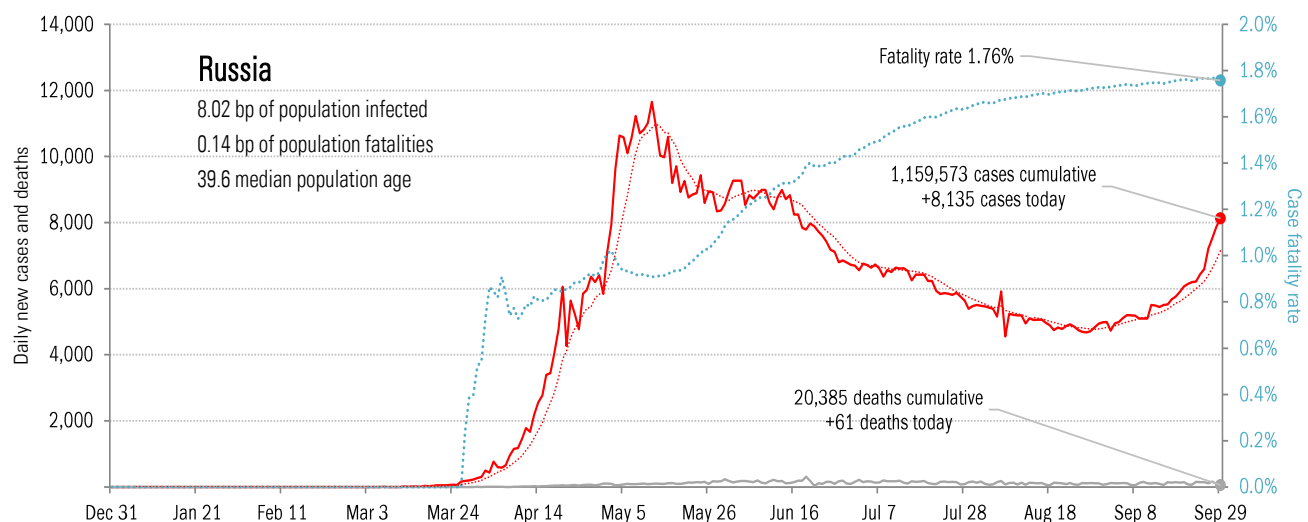
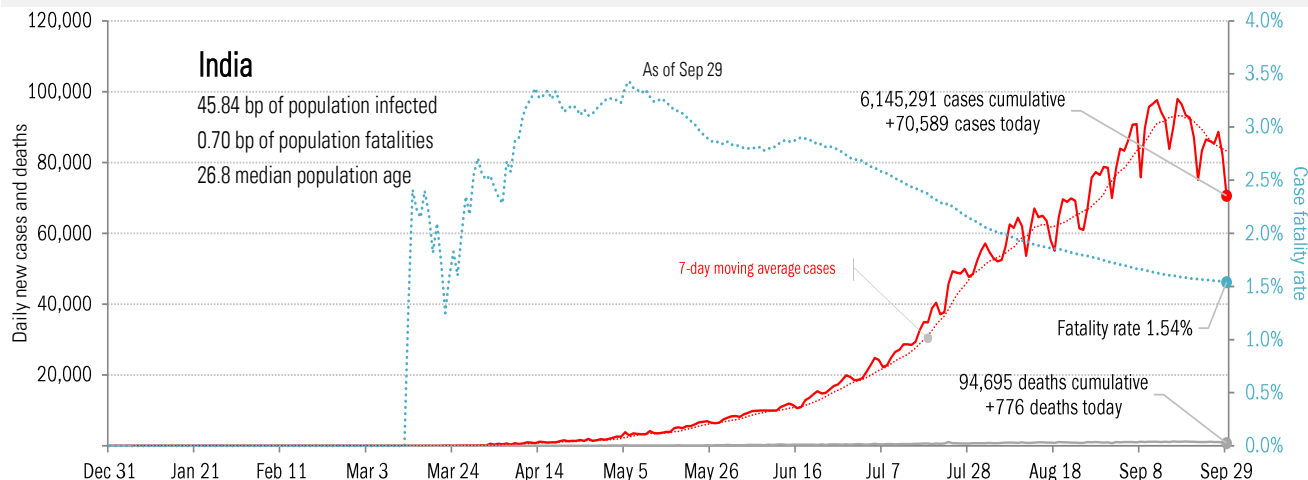
Source: [ECDC](#), TrendMacro calculations

Impact in other hot-spots



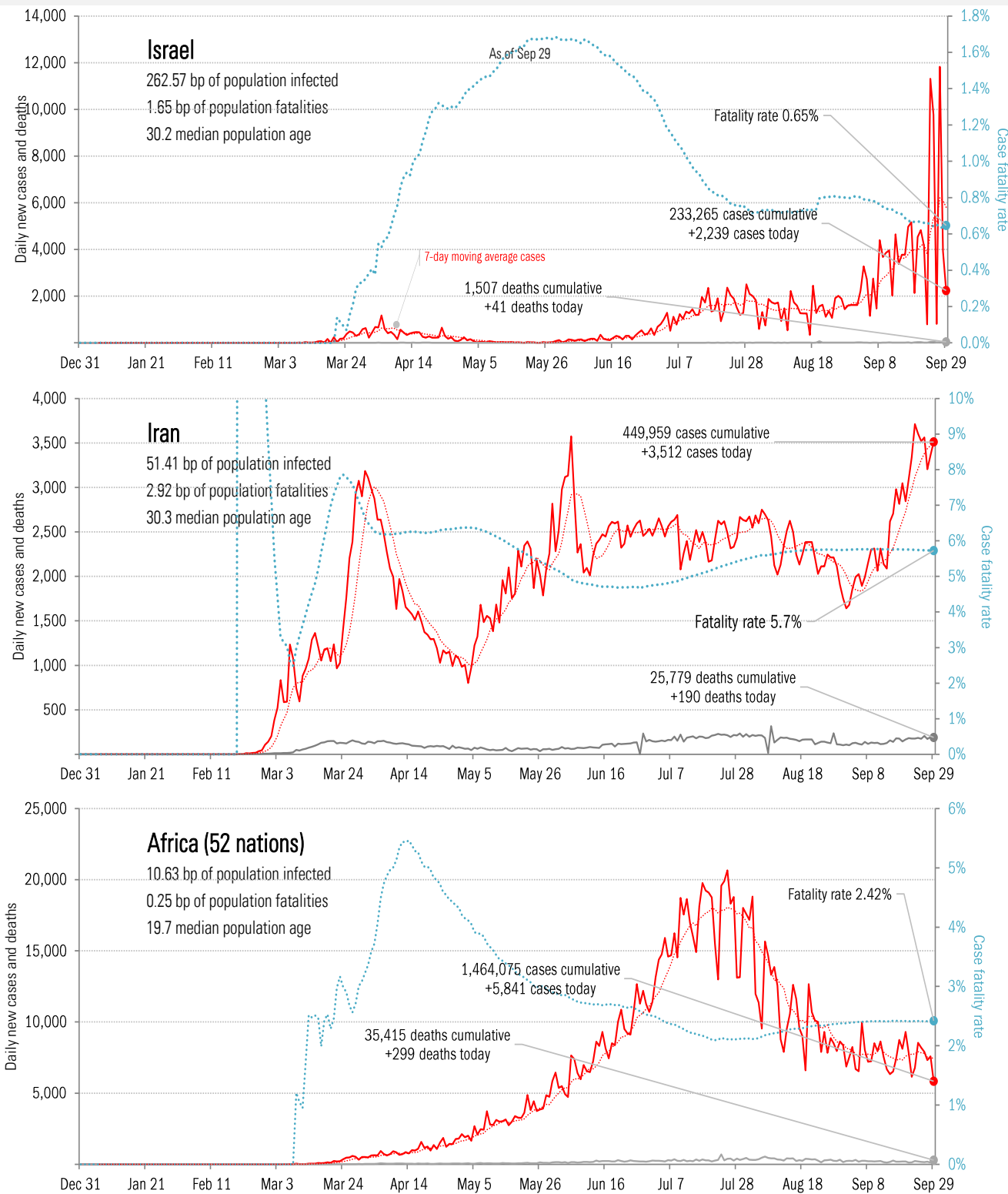
Source: [ECDC](#), TrendMacro calculations

Impact in the BRICs ex-China



Source: [ECDC](#), TrendMacro calculations

Impact in the Middle East and Africa



Source: [ECDC](#), TrendMacro calculations