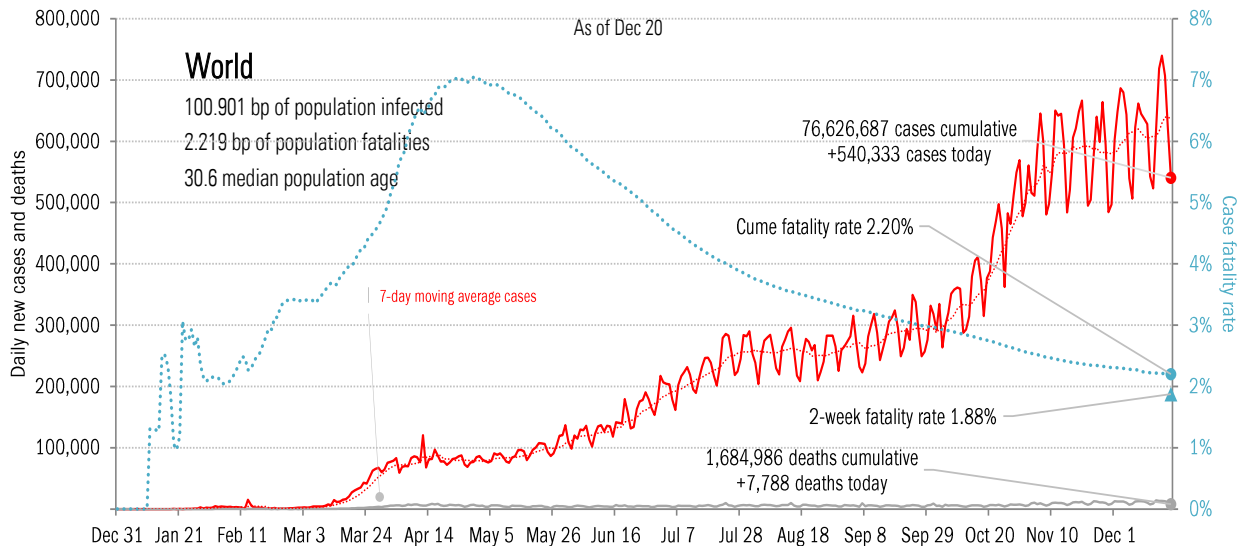
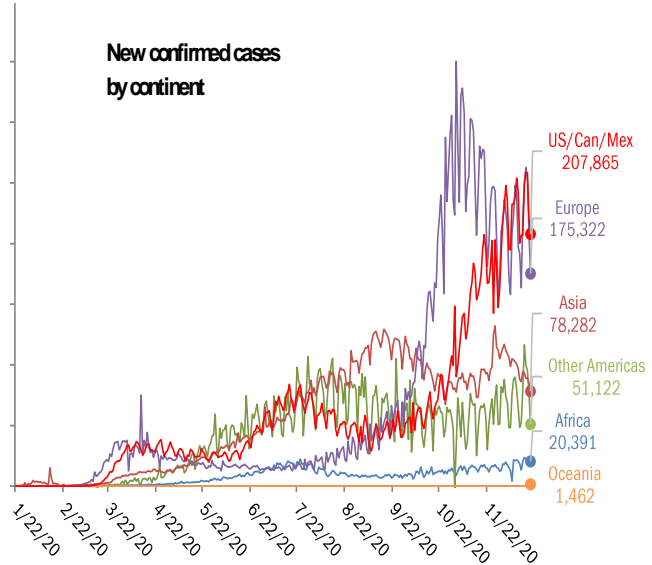


## Data Insights: Covid-2019 Monitor

Monday, December 21, 2020

### The global scorecard

The worst ten countries			
New cases		New Deaths	
United States	+194,988	United States	+1,618
United Kingdom	+36,084	Russia	+498
Russia	+28,510	Brazil	+408
Brazil	+25,445	Italy	+352
India	+24,337	India	+333
Turkey	+20,316	Mexico	+326
Italy	+15,102	United Kingdom	+326
Netherlands	+13,072	Turkey	+246
France	+12,799	Germany	+229
Colombia	+11,160	Indonesia	+221
<b>+381,813</b>		<b>+4,557</b>	
World	+540,333	World	+7,788
Top ten	71%	Top ten	59%



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

#### For more information contact us:

Donald Luskin: 312 273 6766 [don@trendmacro.com](mailto:don@trendmacro.com)

Thomas Demas: 704 552 3625 [tdemas@trendmacro.com](mailto:tdemas@trendmacro.com)

# The US scorecard

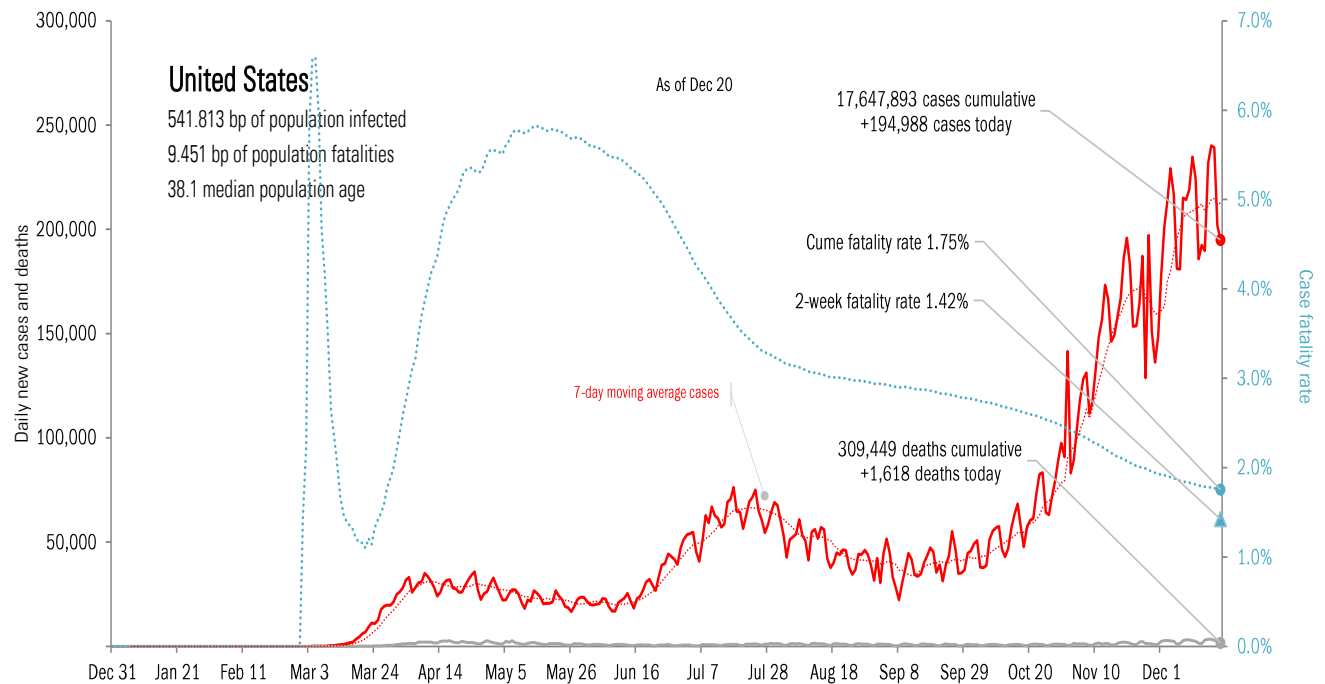
## The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
CA	+46,474		CA	+161		CA	+352		CA	1,854,456		NY	28,598		NY	89,995		DC	76%	OK	96%
TN	+16,036		NY	+124		FL	+149		TX	1,581,668		TX	25,348		FL	60,791		NY	74%	TX	90%
NY	+9,957		TX	+122		GA	+108		FL	1,181,549		CA	22,593		NJ	45,182		MA	72%	AZ	90%
CH	+8,377		TN	+111		TX	+60		IL	900,370		FL	20,861		GA	39,412		MD	72%	TN	89%
FL	+8,140		PA	+99		MO	+36		NY	848,042		NJ	18,194		CH	34,747		DE	71%	DC	87%
TX	+7,780		FL	+97		MD	+27		CH	622,806		IL	16,407		AZ	33,037		FL	70%	MS	85%
PA	+7,213		IL	+81		AL	+19		PA	555,702		PA	13,924		IN	32,496		WA	70%	PA	83%
NC	+6,900		MN	+70		SC	+10		TN	519,687		MI	12,074		AL	30,224		NJ	69%	GA	83%
IN	+6,483		IN	+66		NJ	+4		GA	509,588		MA	11,717		MD	24,623		VT	69%	MI	82%
IL	+6,003		MA	+60		VT	+4		MI	496,056		GA	10,383		MN	20,547		CT	68%	CO	81%
+123,363			+991			+769			9,069,924			180,099			411,054						
All states	+194,988		+1,618			-266			All states	17,647,893		309,449			643,866			All states	63%		73%
Top ten	63%		61%			-289%			Top ten	51%		58%			64%			Median	61%		70%

Some states not reporting

## Five most improved US states

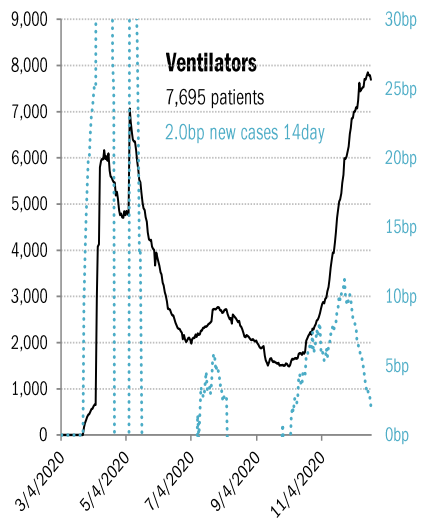
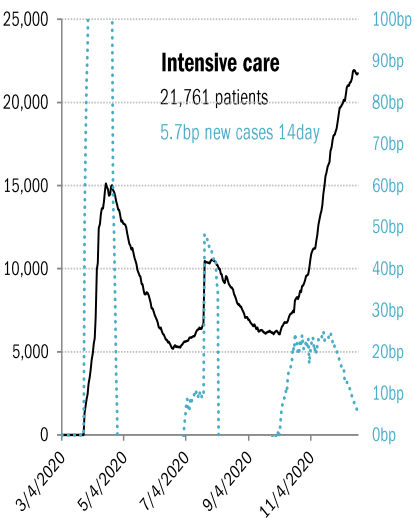
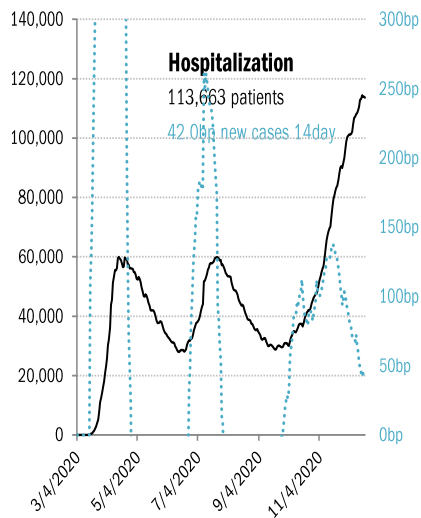
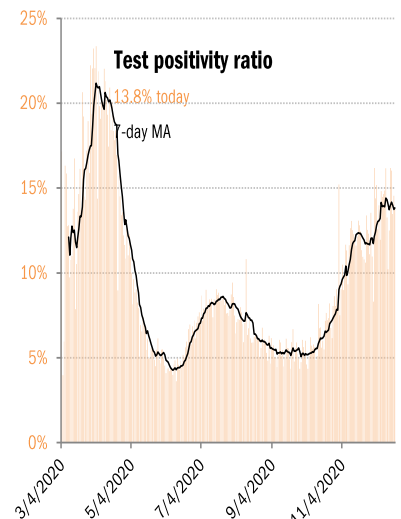
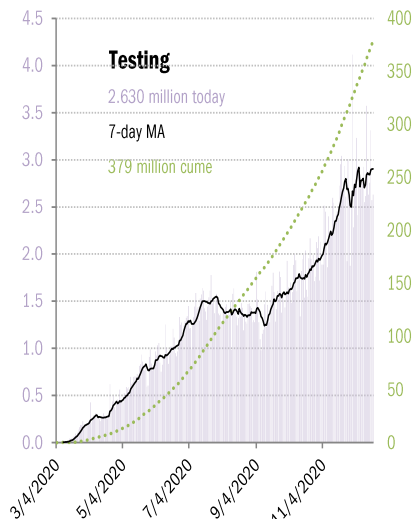
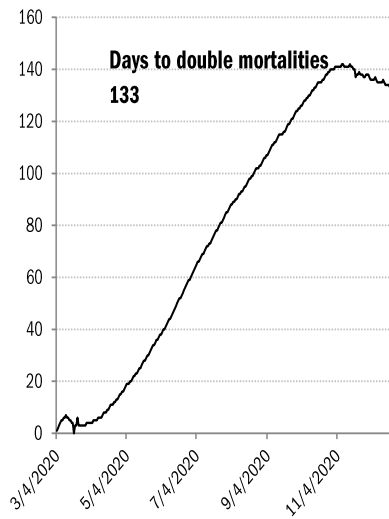
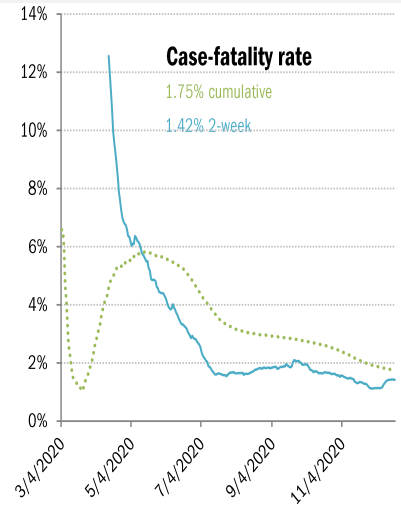
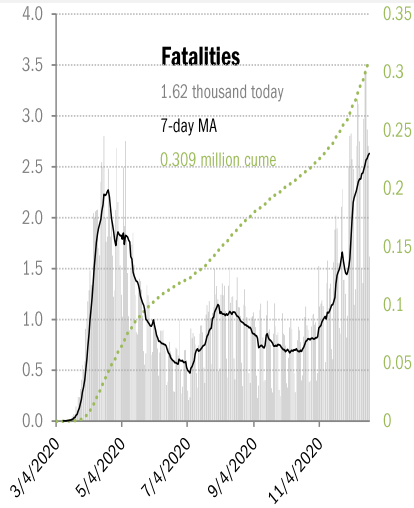
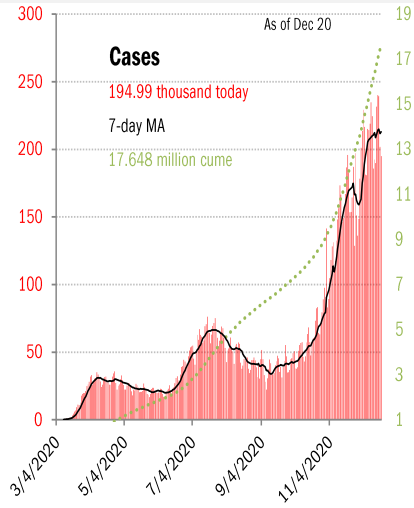
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most recoveries	
TX	-10,127	MI	-206	AZ	-198	TN	+9,713
MI	-4,181	TX	-150	IL	-169	TX	+8,030
FL	-3,316	PA	-118	NY	-150	CH	+7,207
PA	-2,621	CA	-111	TN	-121	MN	+4,292
WI	-2,270	AL	-93	NC	-120	WI	+3,423



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

# US deep-dive

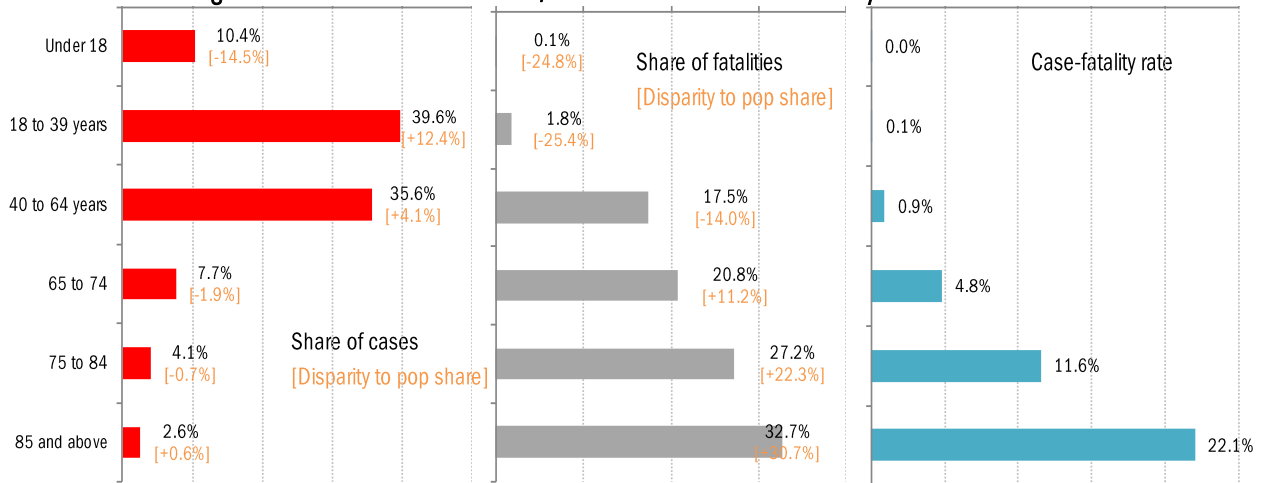
National and state-by-state data do not line up because of different sources



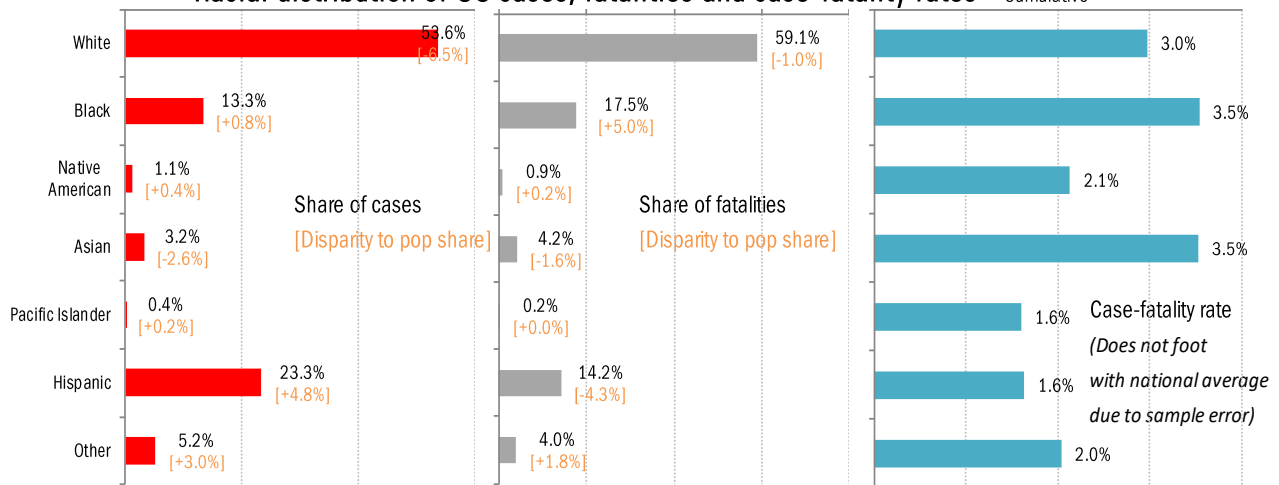
Source: [Covid Tracking Project](#), TrendMacro calculations

# US deep-dive on the demographics of age, race and health

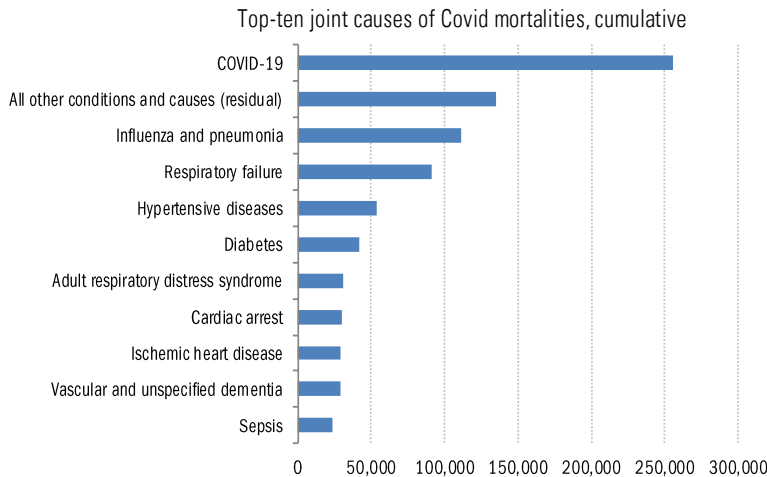
## Age distribution of US cases, fatalities and case-fatality rates



## Racial distribution of US cases, fatalities and case-fatality rates



## Comorbidities



For 6% of the deaths, COVID-19 was the only cause mentioned. For deaths with conditions or causes in addition to COVID-19, on average, there were 2.9 additional conditions or causes per death.

Source: Distributions [CDC](#), Comorbidities [CDC](#), TrendMacro calculations

## Recommended reading

### [Why Are Covid Antibody Drugs Sitting on Shelves?](#)

Scott Gottlieb and Mark McClellan  
*Wall Street Journal*  
December 20, 2020

### [Vaccines Don't Mean We'll See the Last of Covid, Experts Warn](#)

John Lauer and James Paton  
*Bloomberg*  
December 20, 2020

### [United Helps to Contact Passengers After Possible Covid-19-Related Death on Flight](#)

Michael Levenson  
*New York Times*  
December 18, 2020

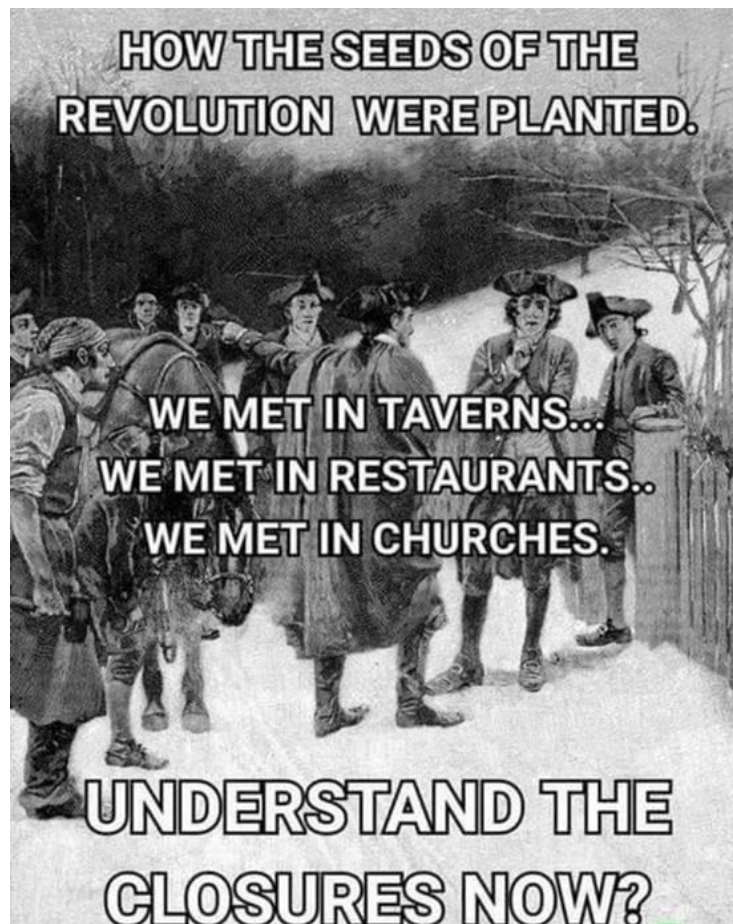
### [Inside the Cutthroat World of China Mutual Fund Livestreaming](#)

*Bloomberg*  
December 16, 2020

### [Frontline Workers and People Over 74 Should Get Shots Next, C.D.C. Panel Says](#)

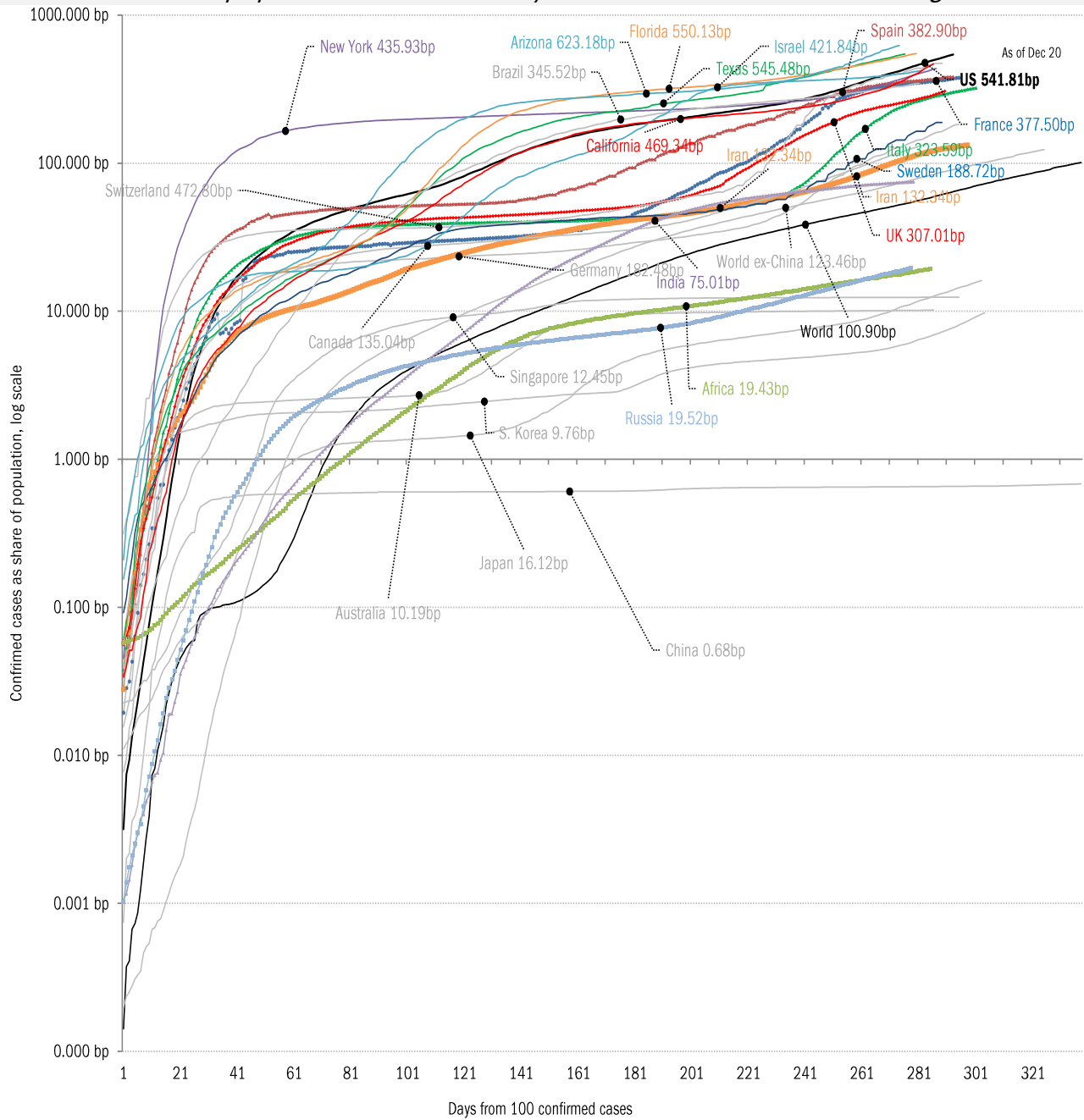
Abby Goodnough and Jan Hoffman  
*New York Times*  
December 20, 2020

## Meme of day



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

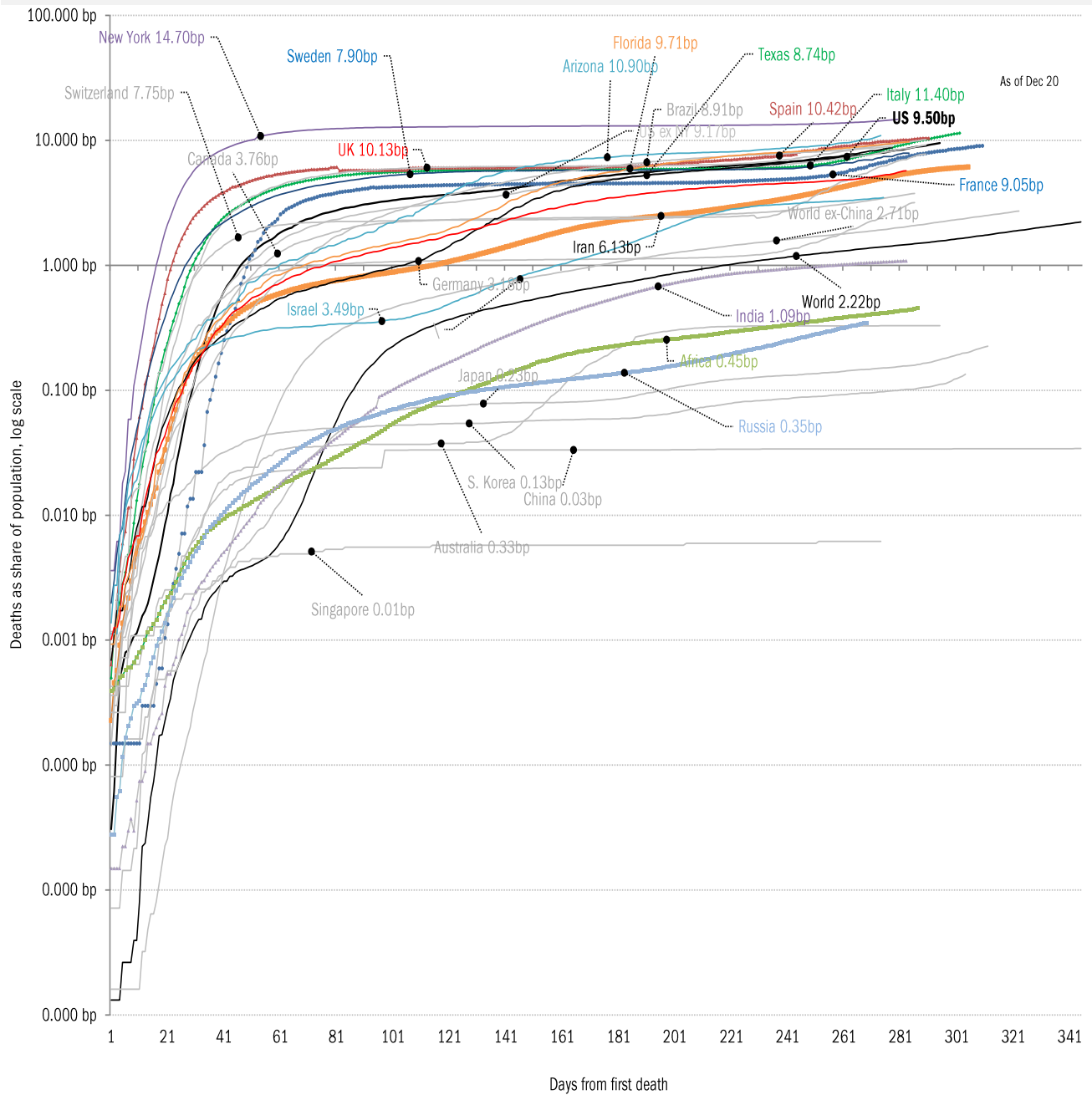
The coronavirus case accelerometer... tracking the world's infection curves  
*Share of infected population from first day with 100 confirmed cases, log scale*



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

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

## Share of deceased population from day of first fatality

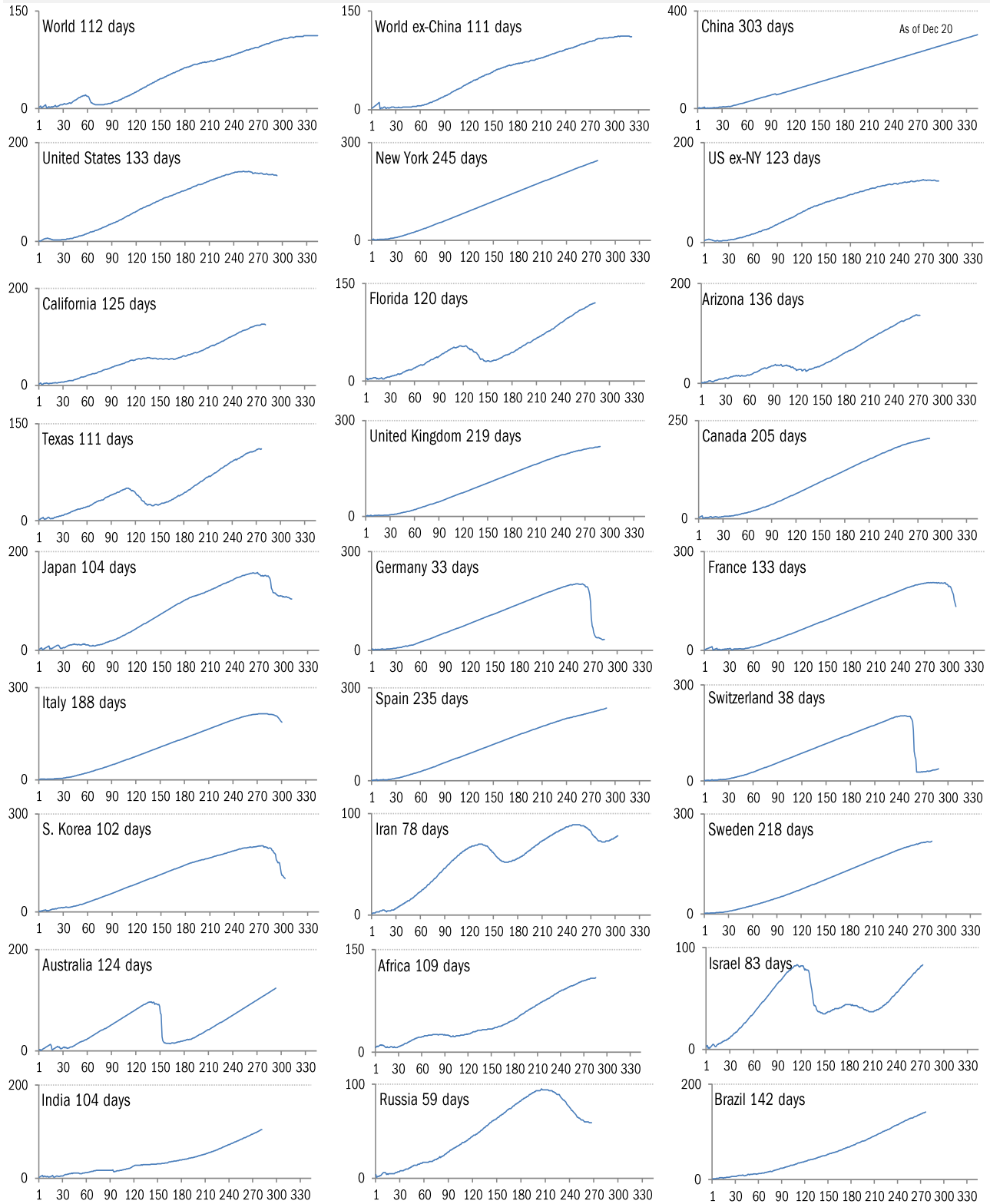


Source: [Johns Hopkins](#), [Covid Tracking Project](#), TrendMacro calculations

# "Exponential"? Our most reliable evidence of the rate of spread of Covid-19

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

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



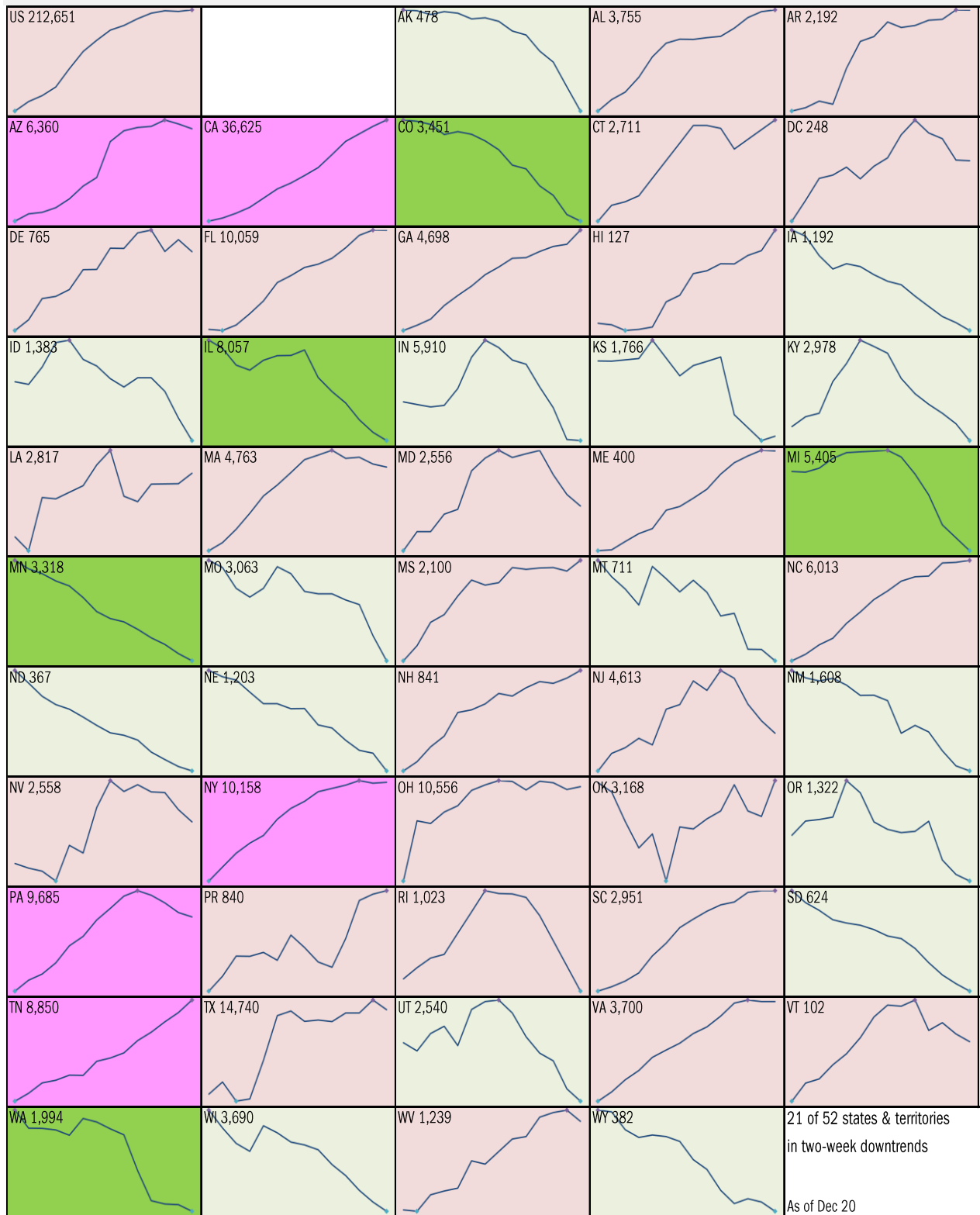
Source: [Johns Hopkins, Covid Tracking Project](#), TrendMacro calculations



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

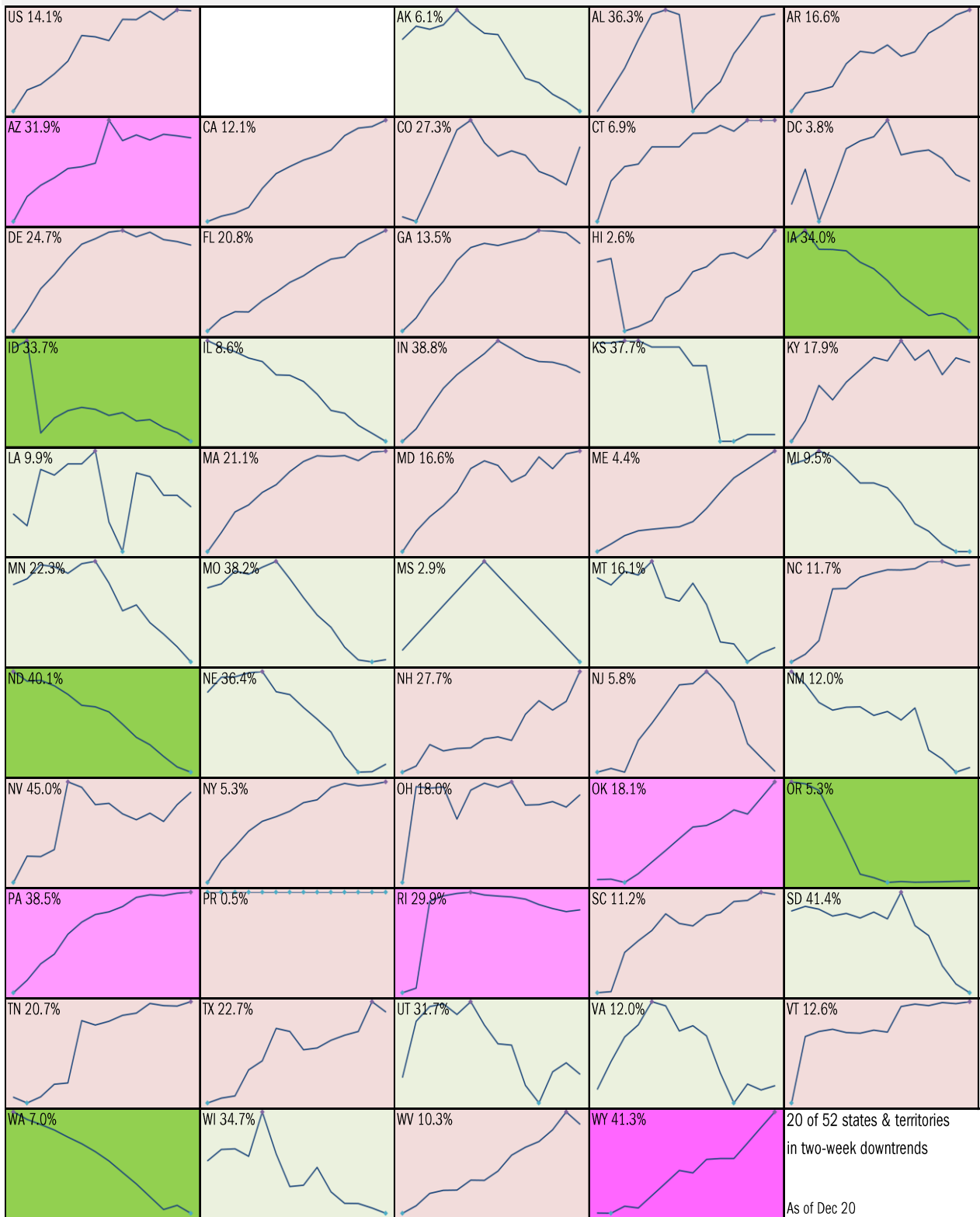


Source: [Covid Tracking Project](#), TrendMacro calculations

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



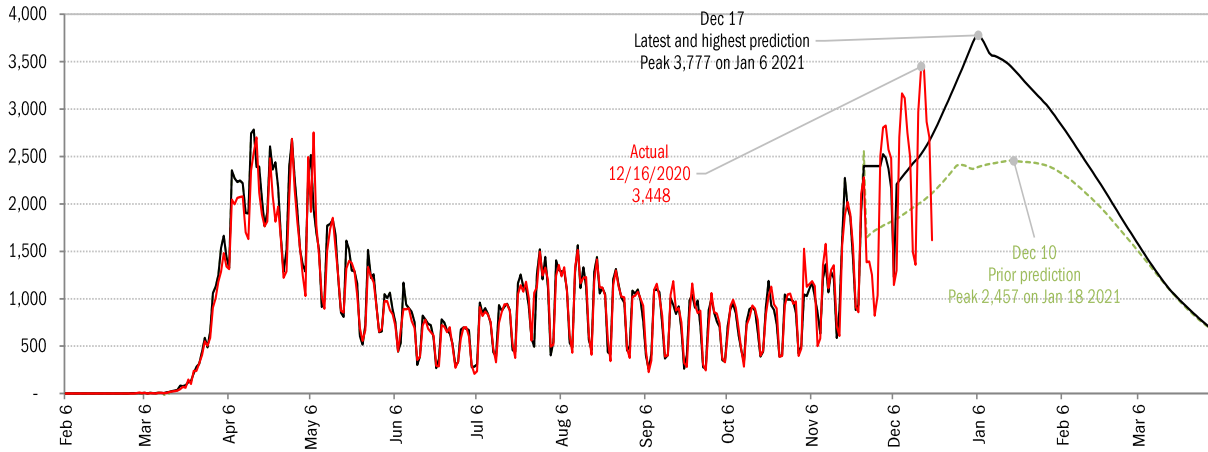
Source: [Covid Tracking Project](#), TrendMacro calculations

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

## New daily fatalities

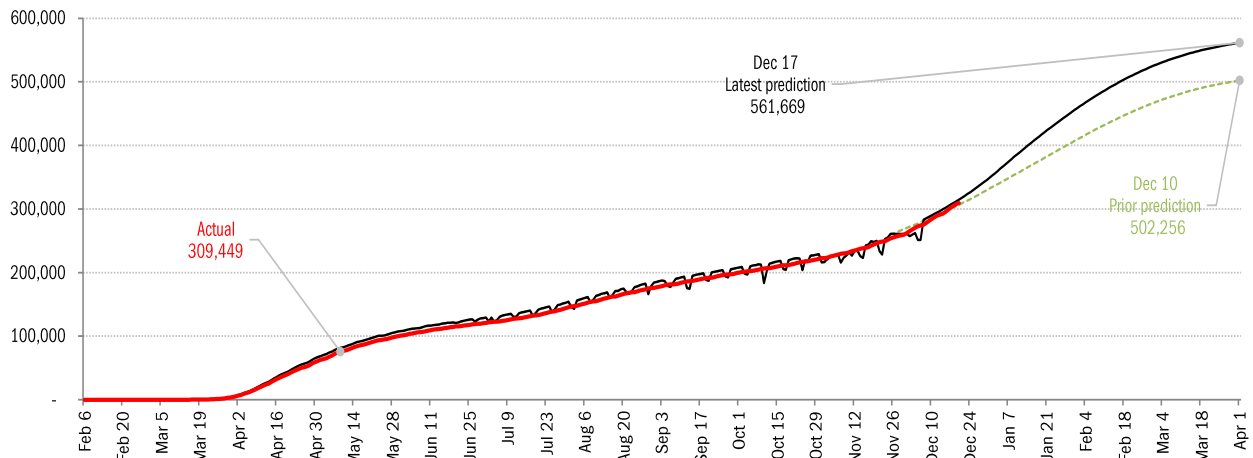
As of Dec 20

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

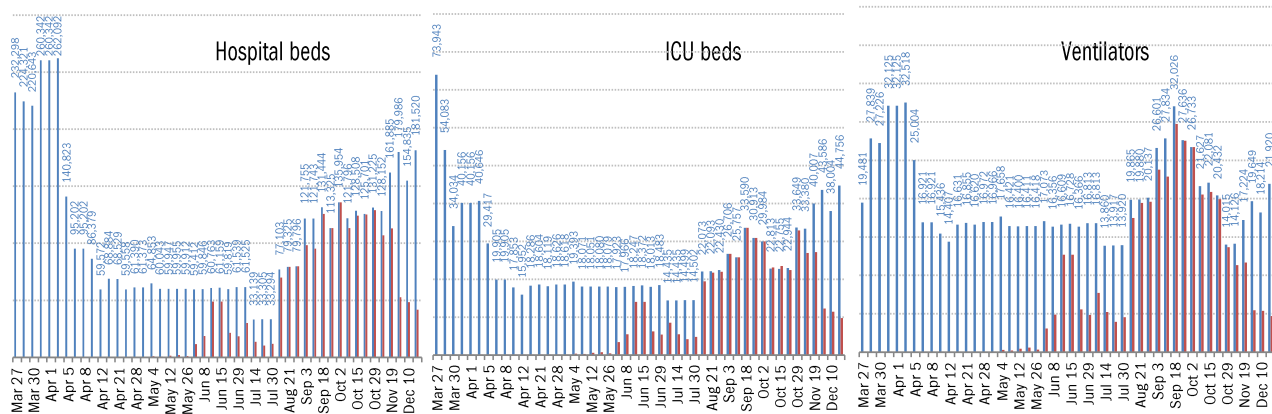


## Cumulative fatalities

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

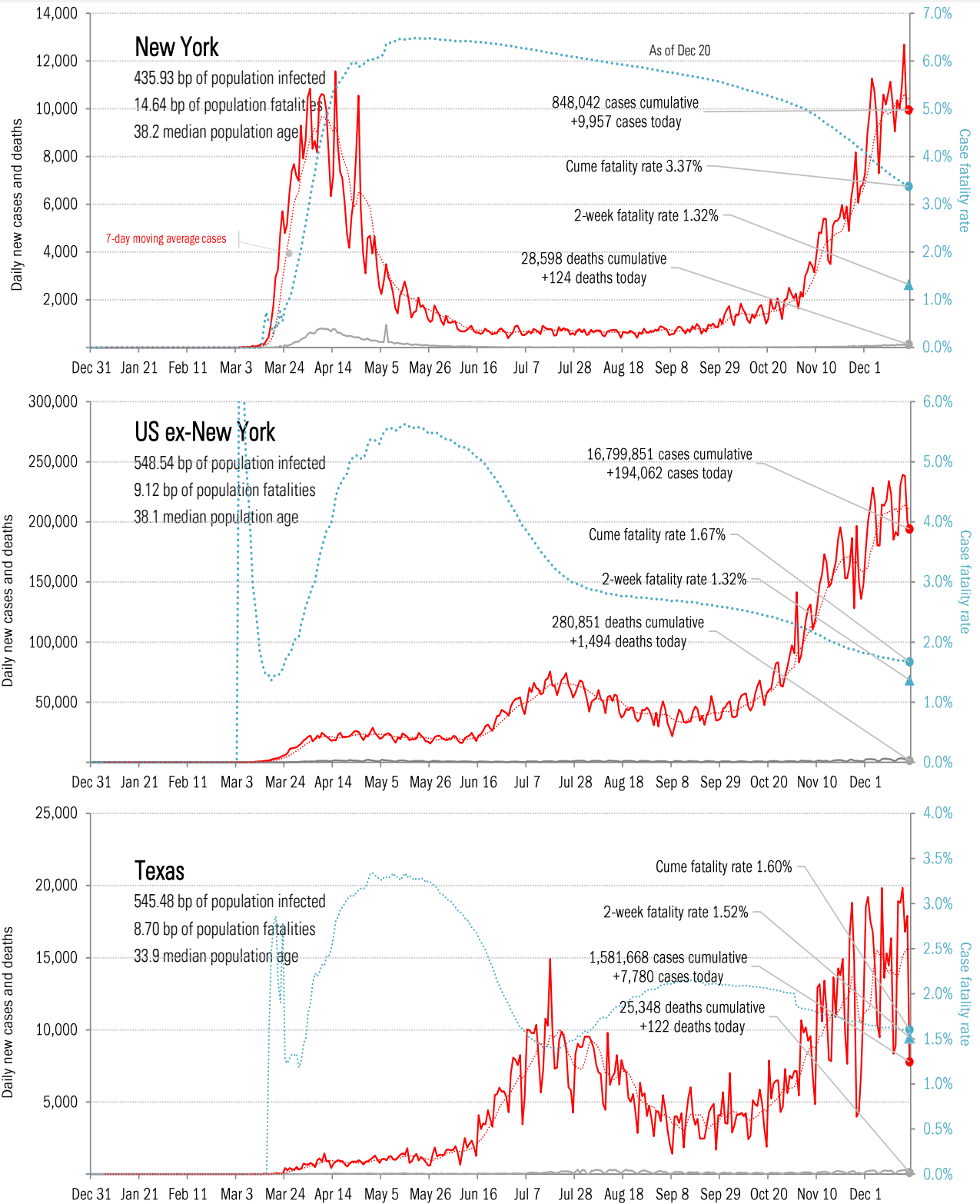


## Healthcare system stress, **peak** and **ultimate** estimated at each model revision



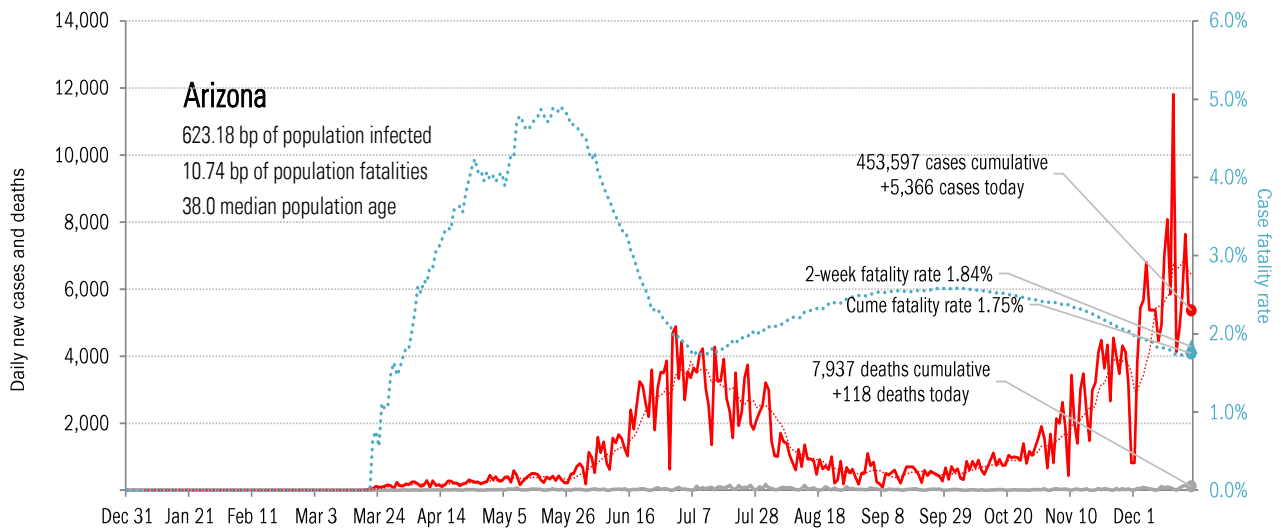
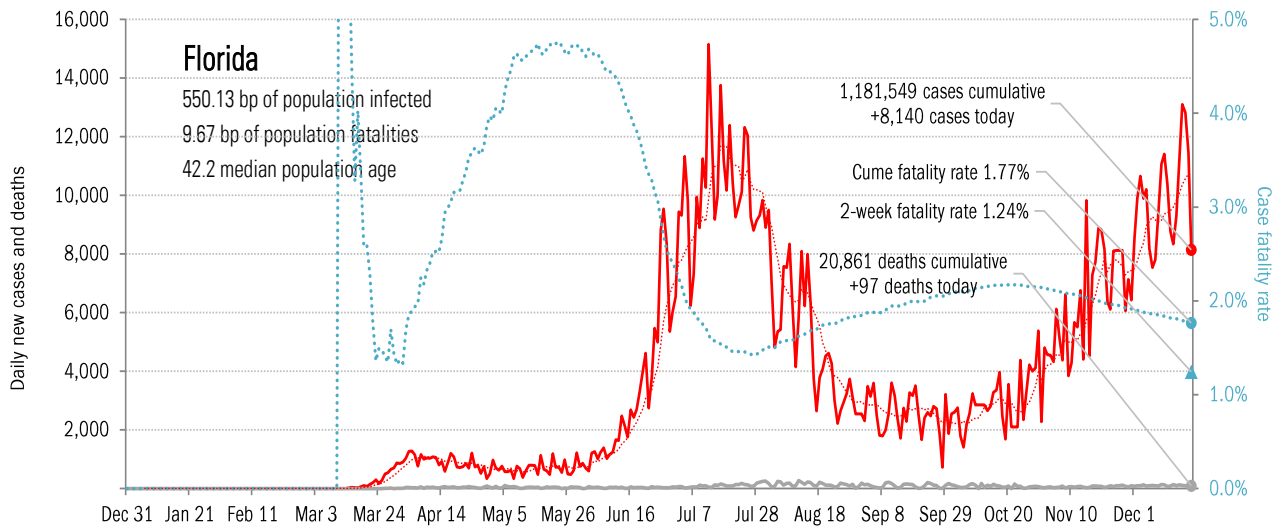
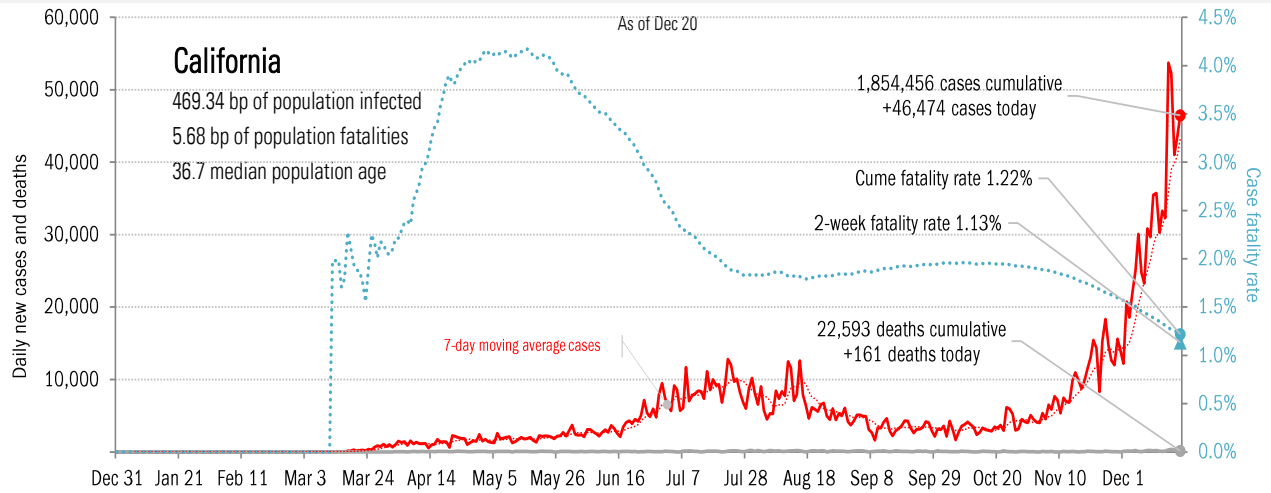
Source: [IHME Covid Tracking Project](#), TrendMacro calculations

# From Ground Zero to the Rio Grande



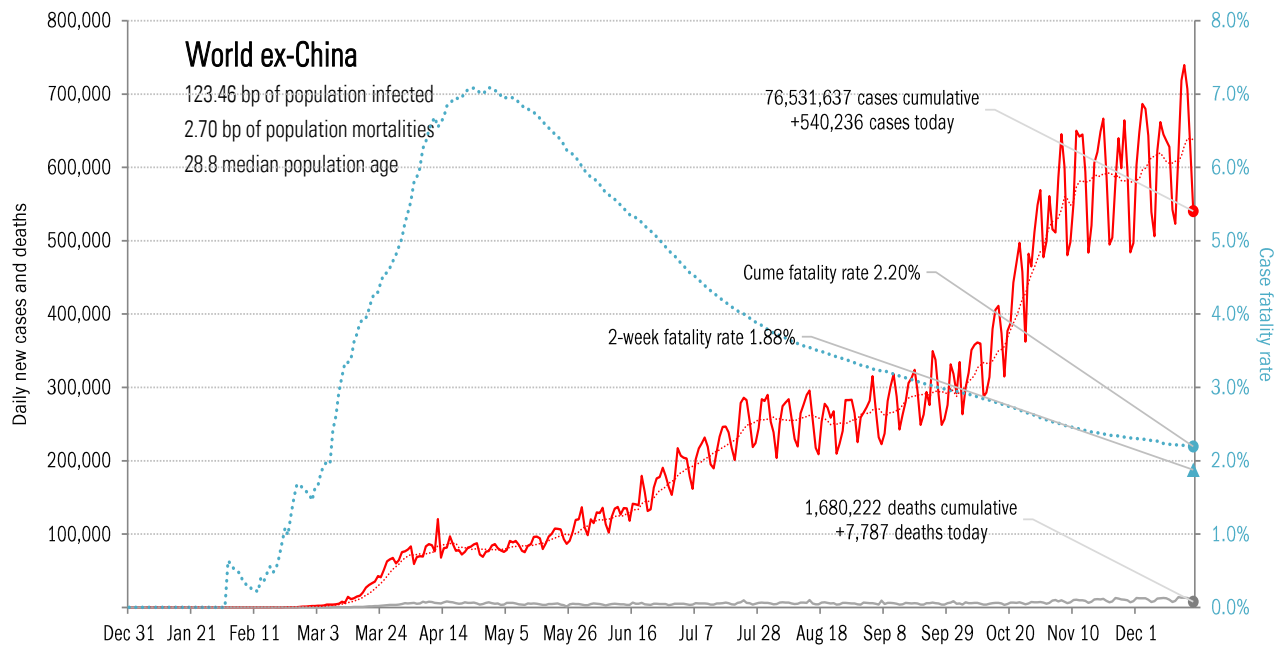
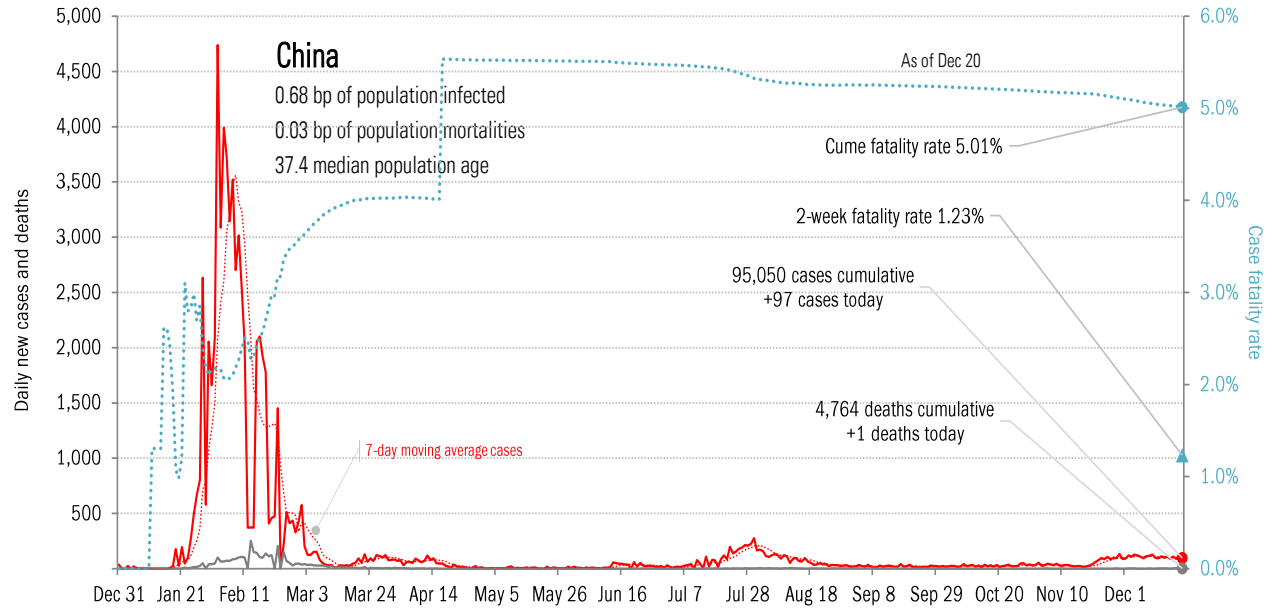
Source: [Covid Tracking Project](#), TrendMacro calculations

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



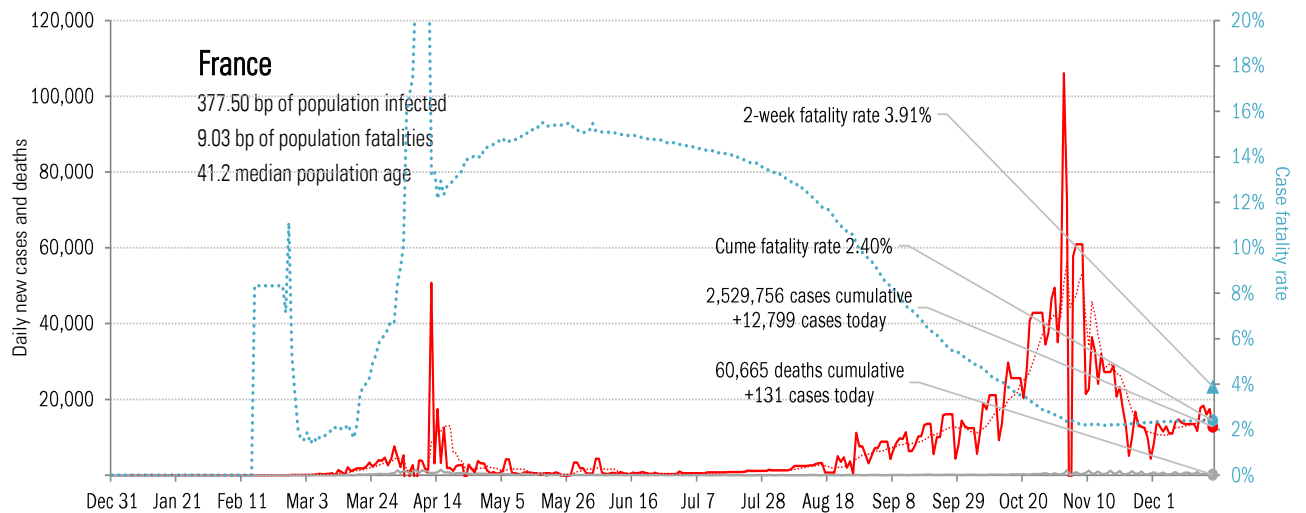
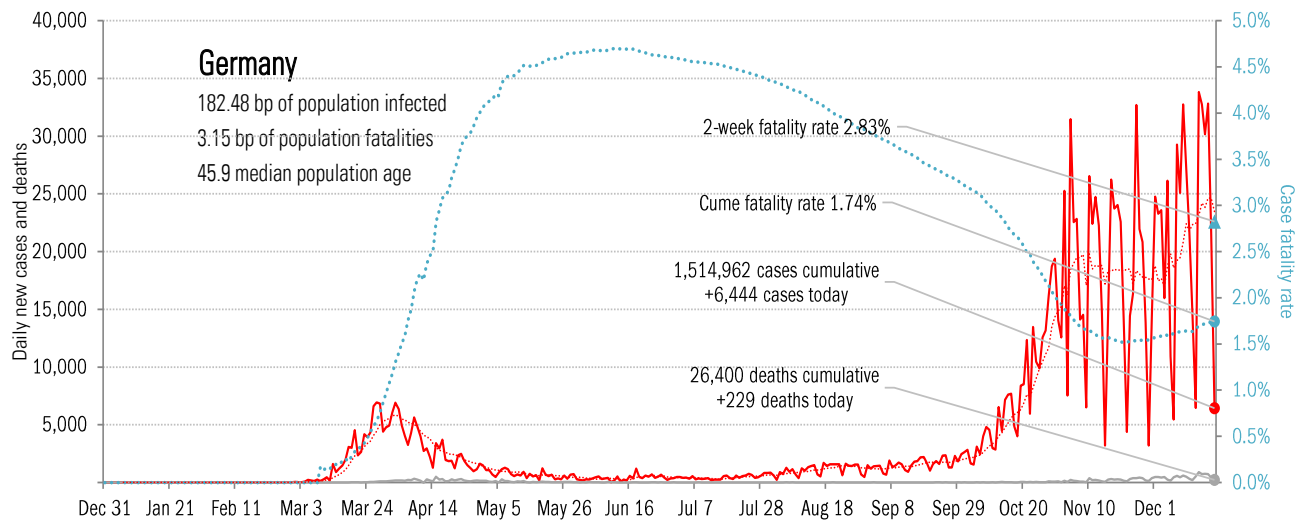
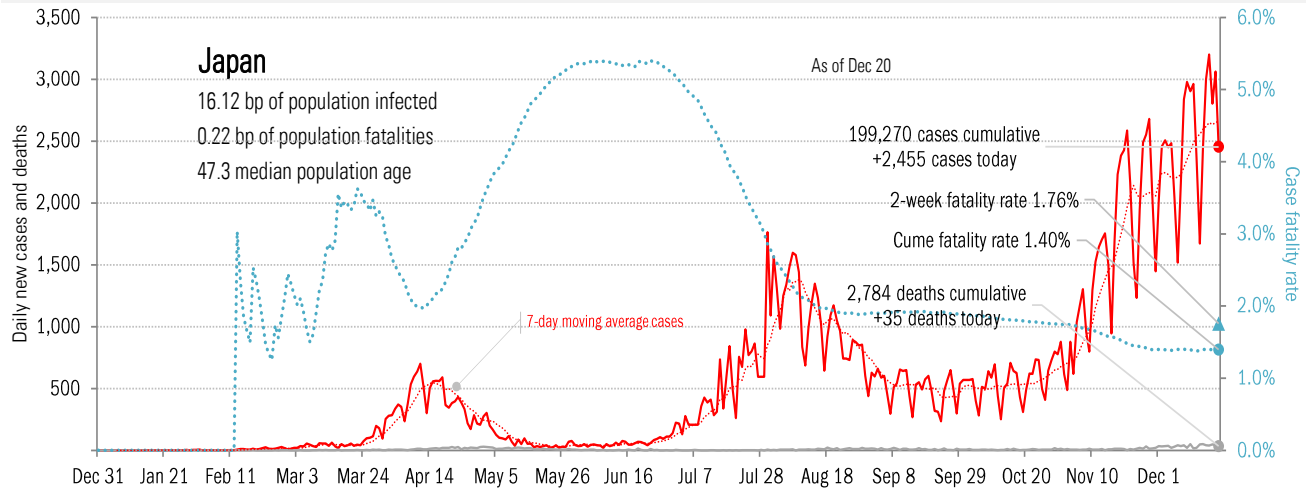
Source: [Covid Tracking Project](#), TrendMacro calculations

# Patient zero... and then everyone else



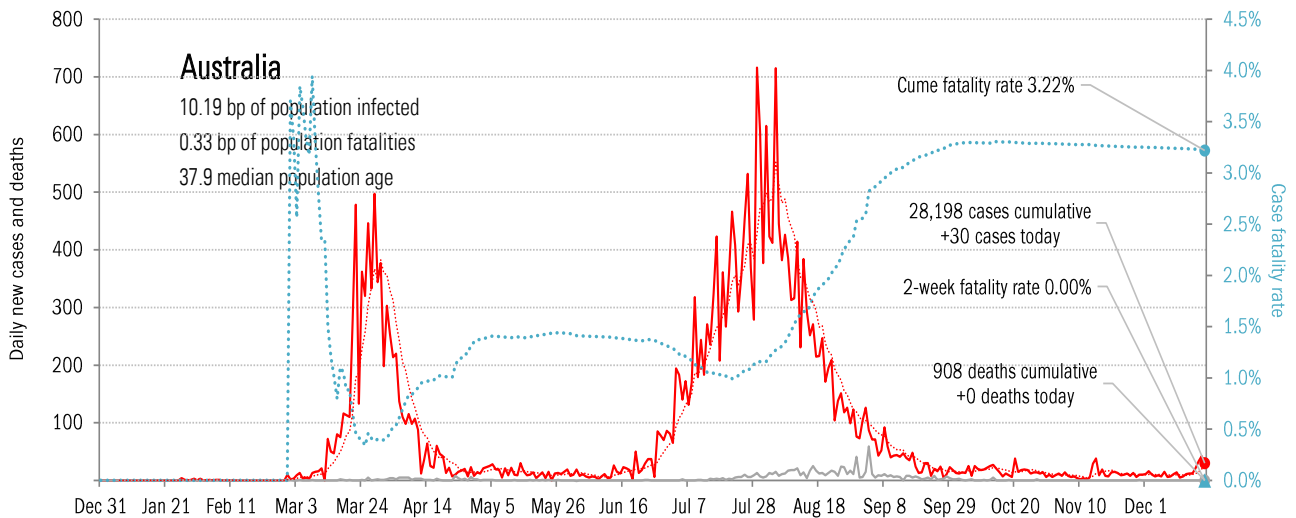
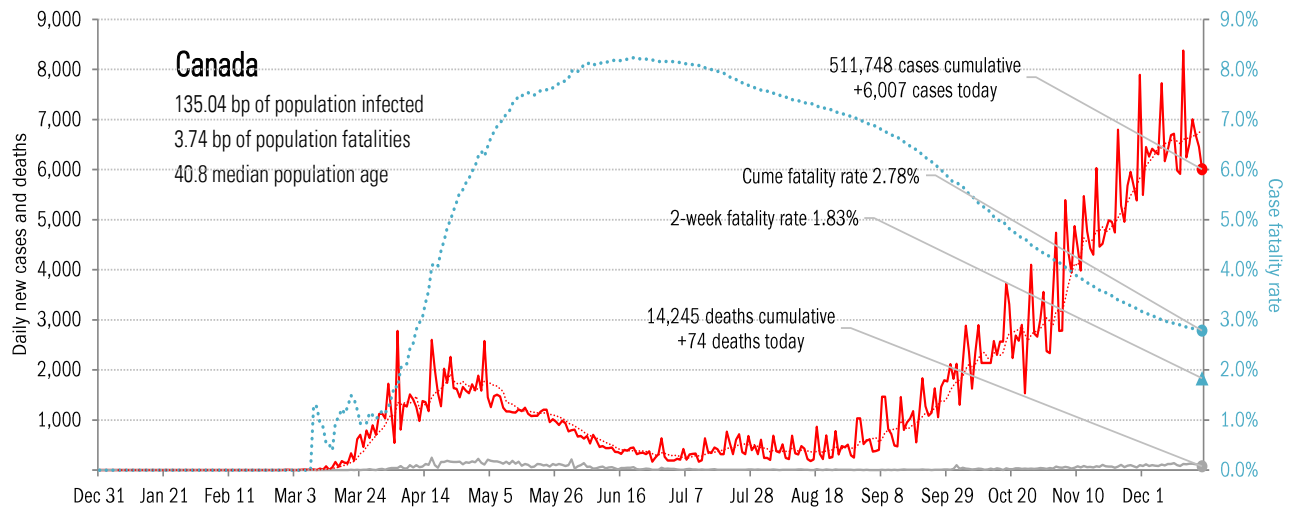
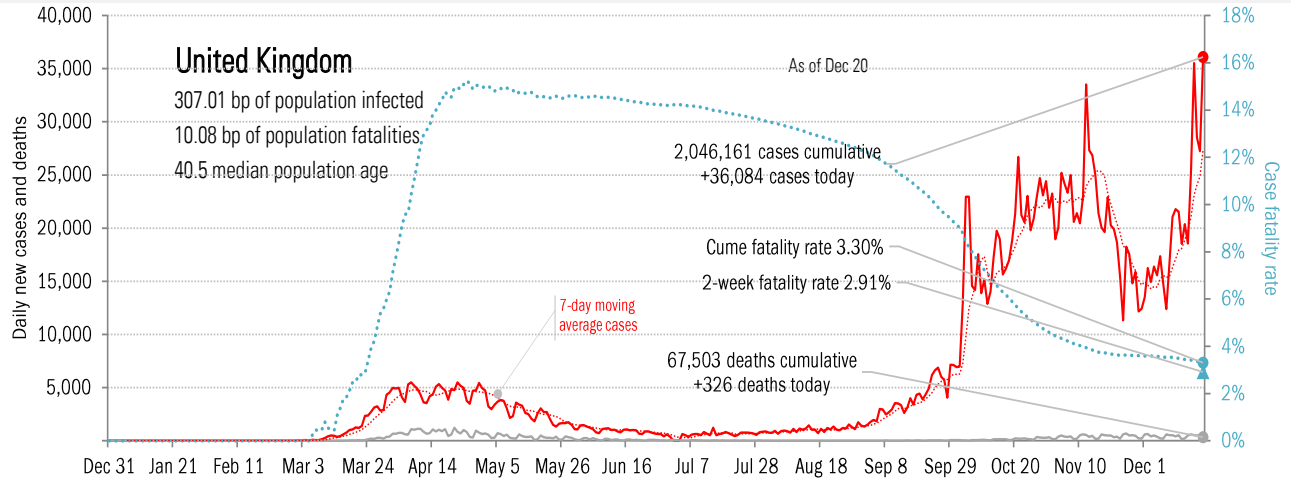
Source: [Johns Hopkins](#), [Covid Tracking Project](#), TrendMacro calculations

# Impact in the largest economies



Source: [Johns Hopkins](#), TrendMacro calculations

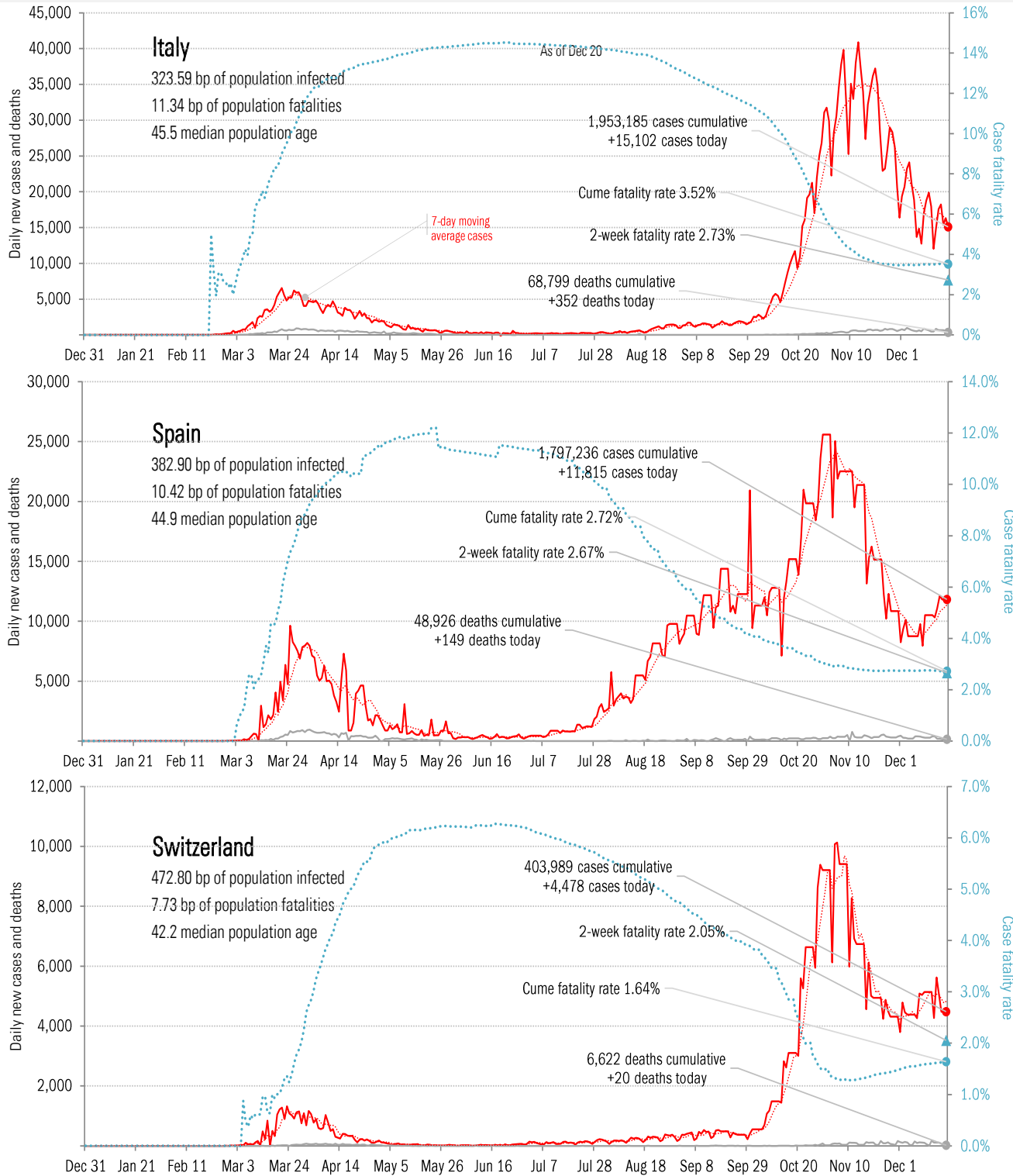
# Impact in The Anglosphere



Source: [Johns Hopkins](#), TrendMacro calculations

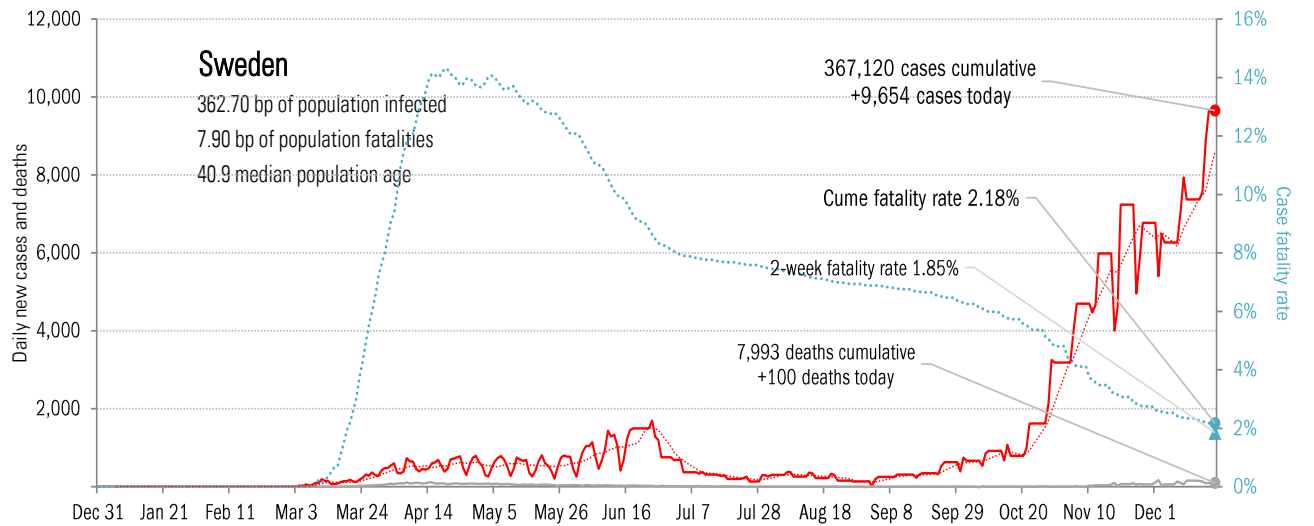
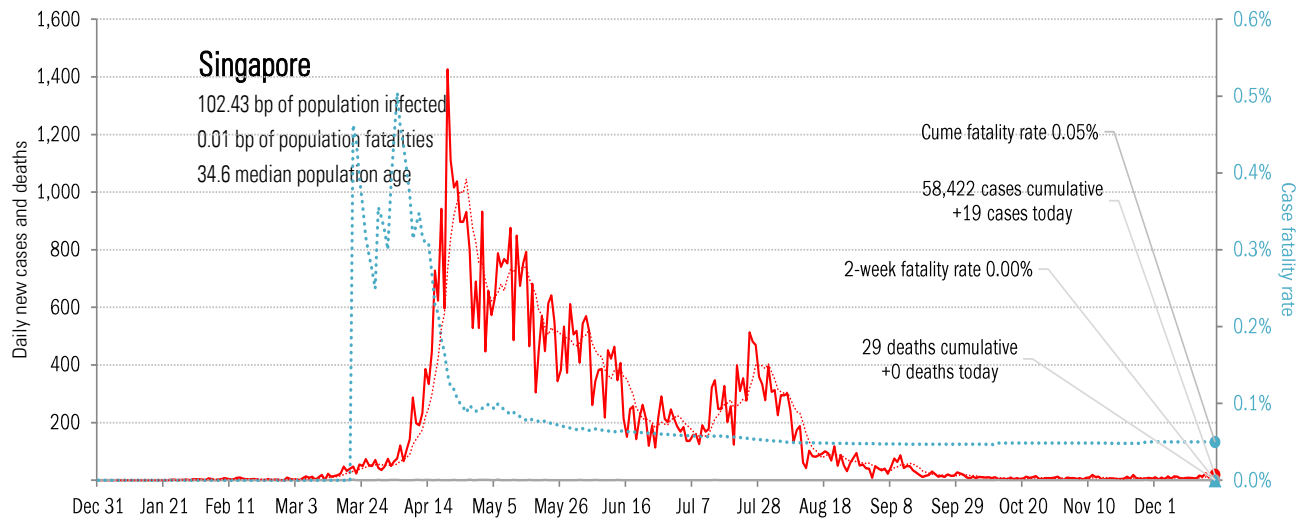
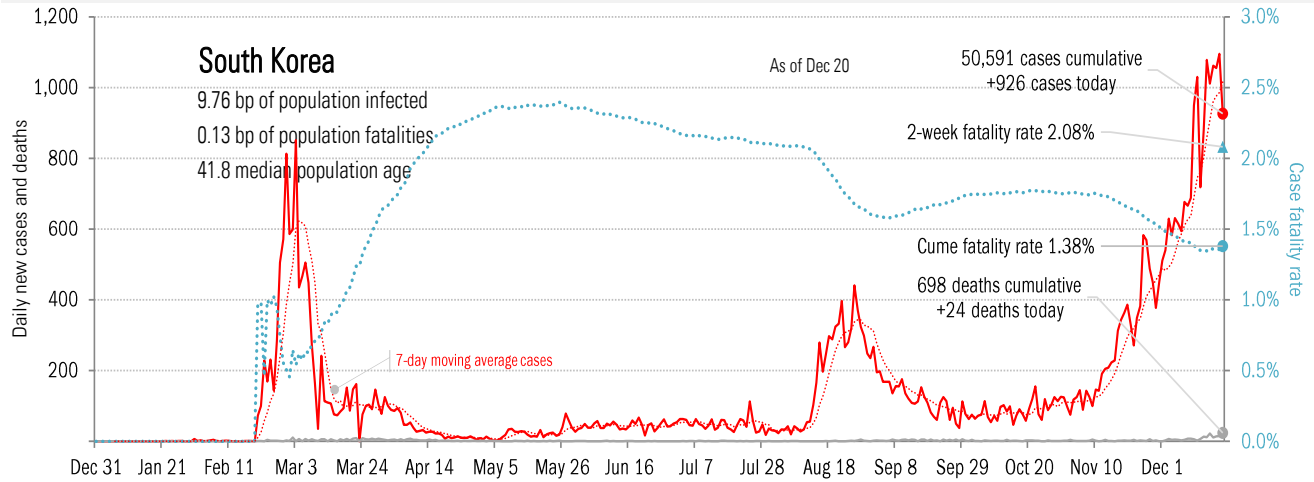


# Impact in continental Europe



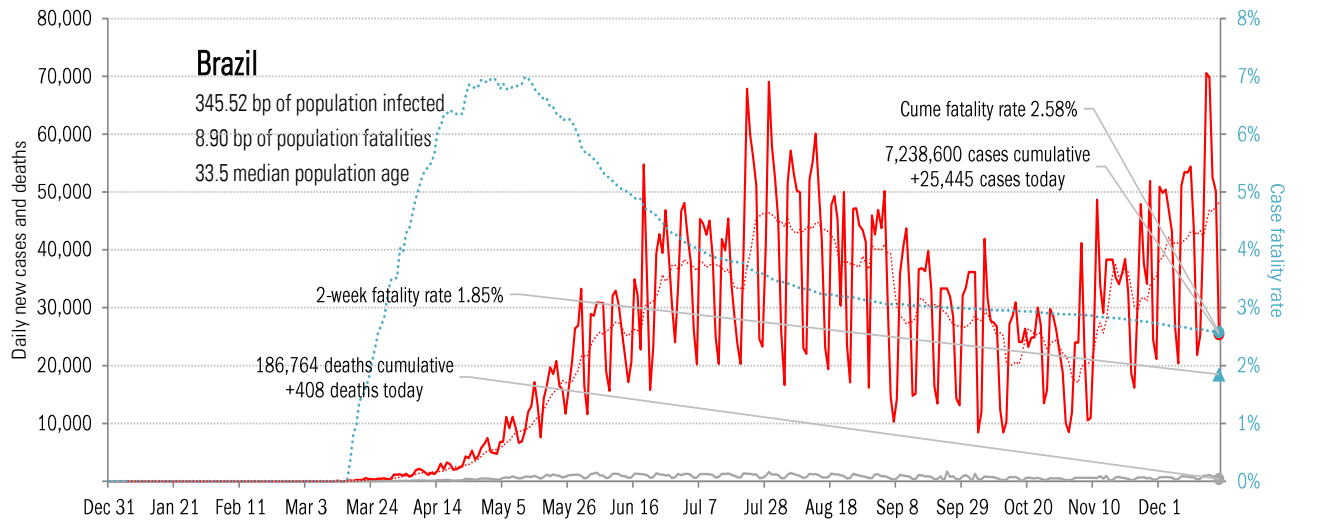
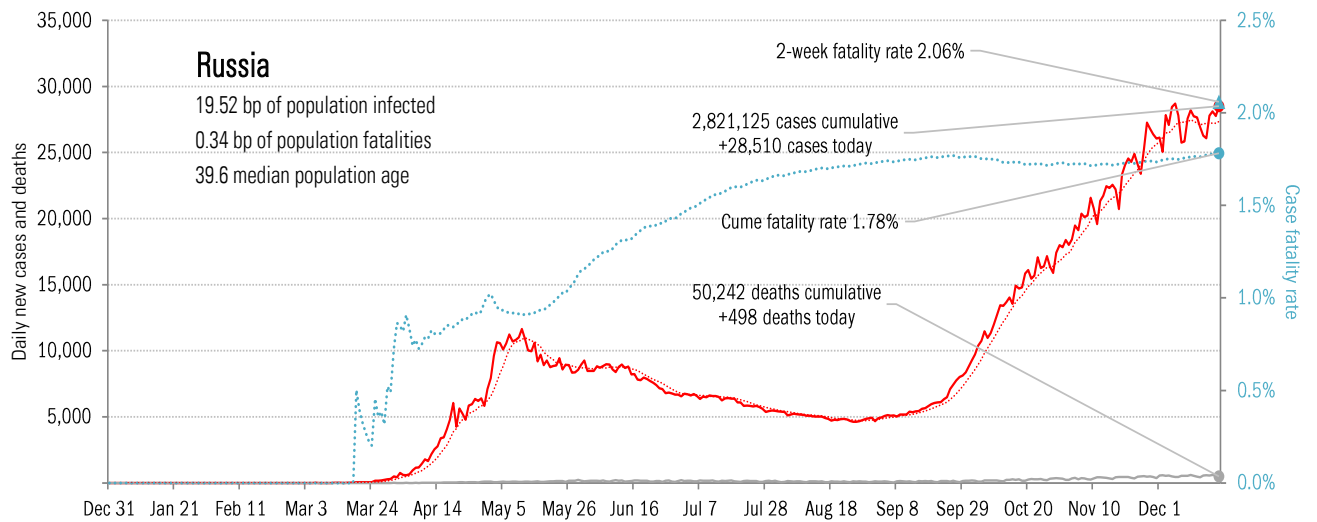
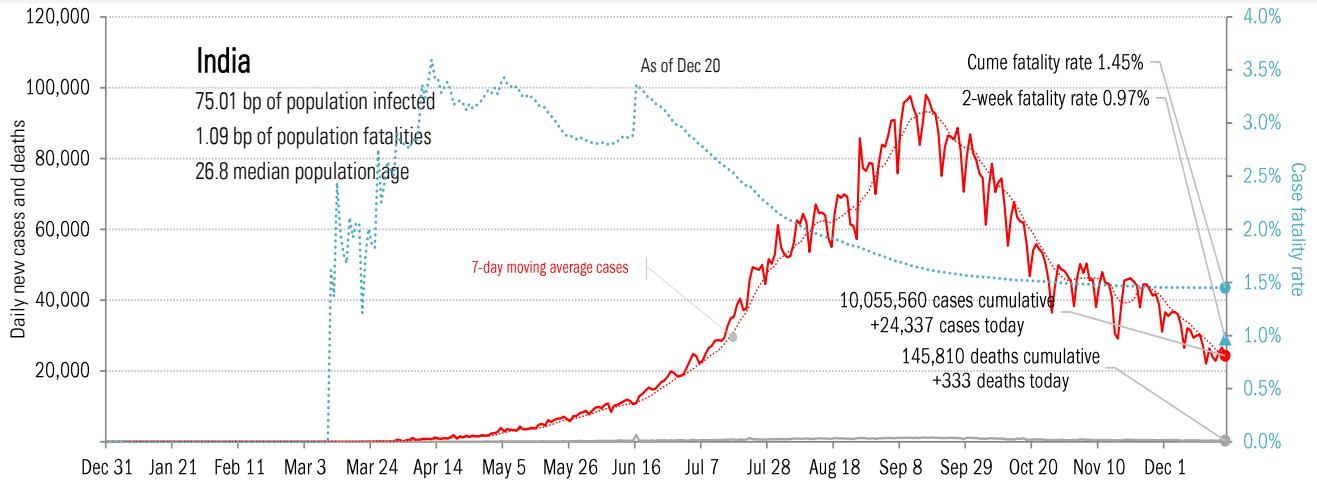
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in other hot-spots



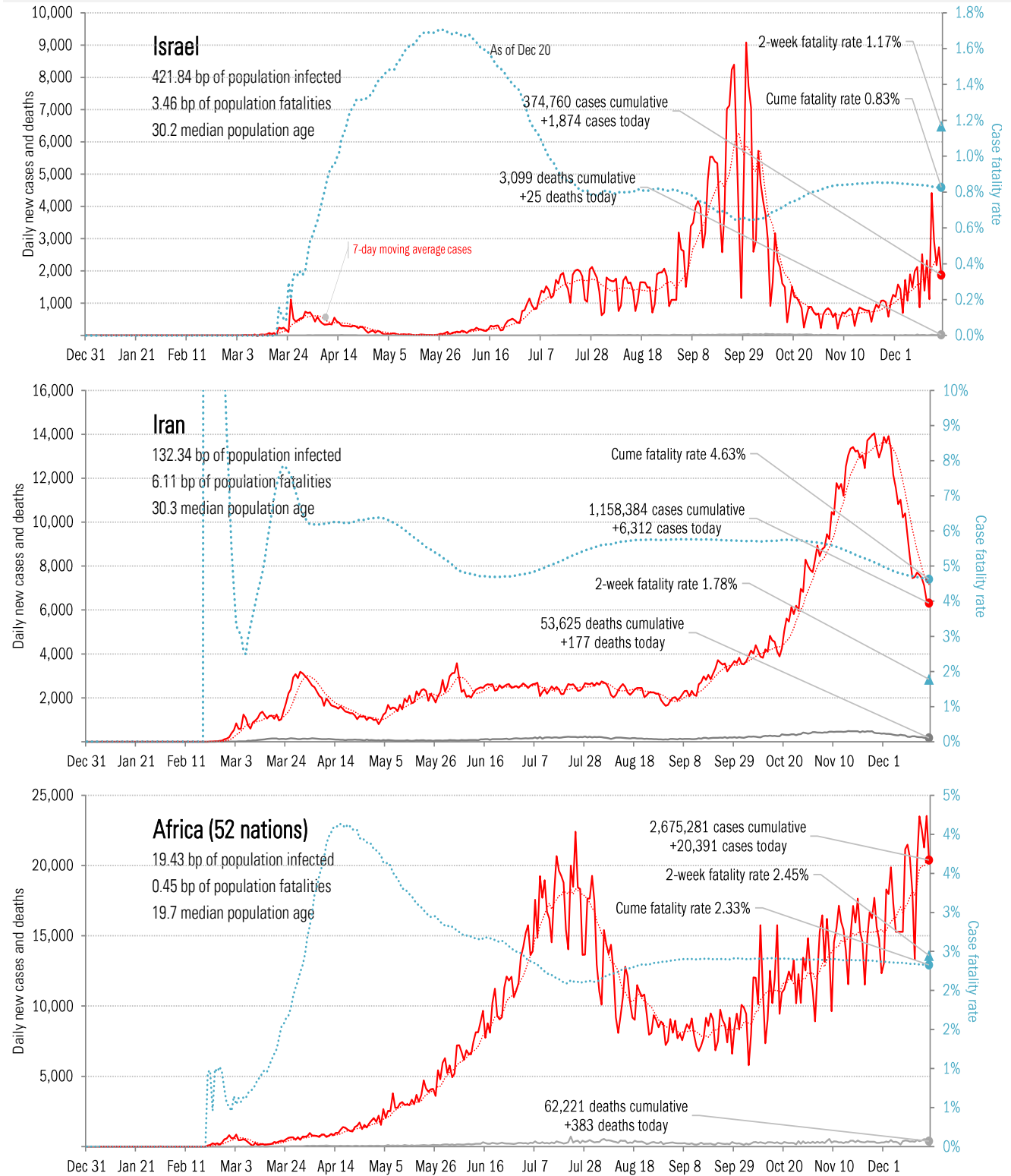
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the BRICs ex-China



Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the Middle East and Africa



Source: [Johns Hopkins](#), TrendMacro calculations