

Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

Data Insights: Covid-2019 Monitor

Friday, January 1, 2021

The global scorecard



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The US scorecard

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Source: Covid Tracking Project, Dept. of Health and Human Services, CDC, TrendMacro calculations







Source: Covid Tracking Project, TrendMacro calculations



Source: Distributions <u>CDC</u>, Comorbidities <u>CDC</u>, TrendMacro calculations

Recommended reading

<u>UK scientists trial drug to prevent infection that leads</u> to Covid

Denis Campbell *The Guardian* December 25, 2020

COVID-19 bill started a 180-day countdown for UFO

disclosures

Steven Greenstreet and Steven Nelson *New York Post* December 29, 2020

Meme of day

The Top 10 Suppressed News Stories of 2020

Frank Miele *RealClear Politics* December 29, 2020



Source: Our beloved clients, and Power Line blog "The Week in Pictures"



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







Requirement to <u>Open Up America Again</u>: 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 <u>Open Up America Again</u>: 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

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



As of Dec 31

Cumulative fatalities





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



Source: IHME, Covid Tracking Project, TrendMacro calculations



Source: Covid Tracking Project,, TrendMacro calculations



Source: Covid Tracking Project,, TrendMacro calculations

Patient zero... and then everyone else











Source: Johns Hopkins, TrendMacro calculations



Source: Johns Hopkins, TrendMacro calculations





Impact in other hot-spots



Source: Johns Hopkins, TrendMacro calculations



