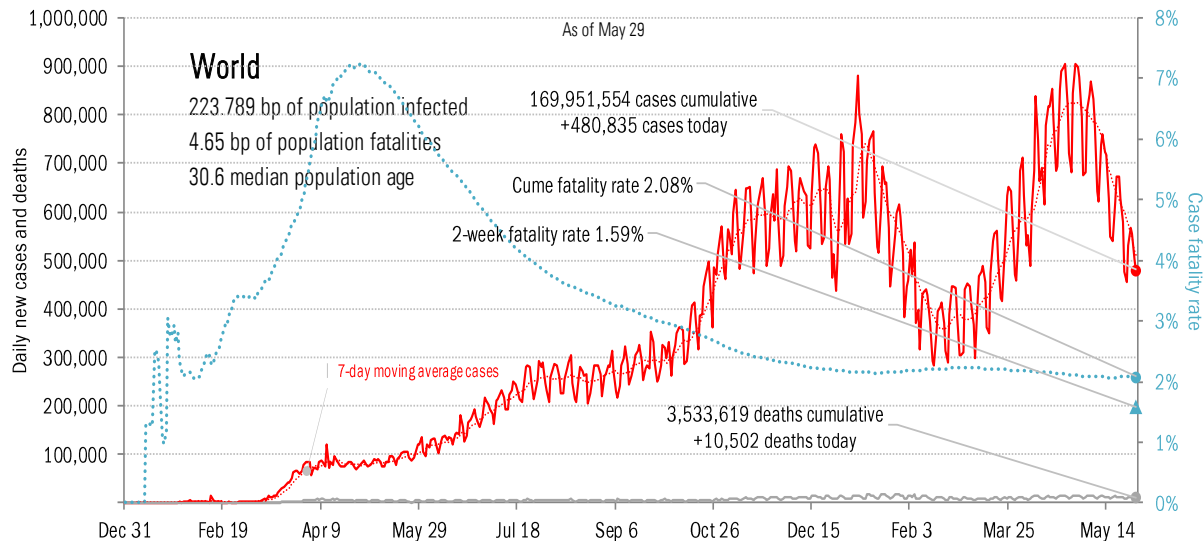
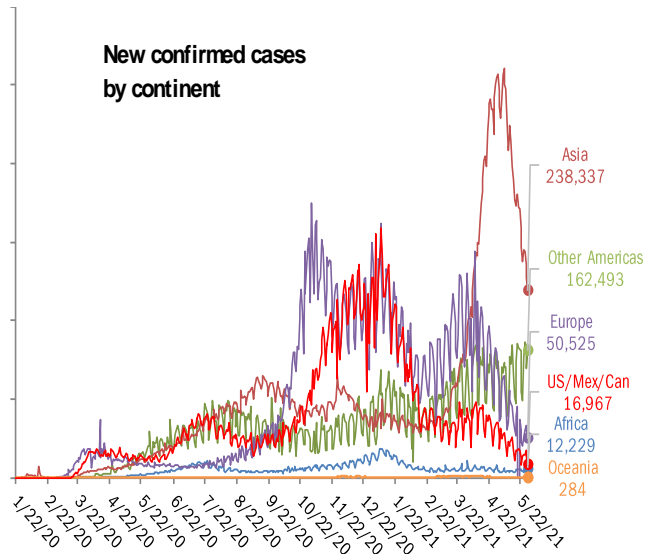


Data Insights: Covid-2019 Monitor

Sunday, May 30, 2021

The global scorecard

The worst ten countries			
New cases		New Deaths	
India	+165,553	India	+3,460
Brazil	+79,670	Brazil	+2,012
Argentina	+29,841	Colombia	+540
Colombia	+20,494	Argentina	+415
United States	+11,976	Russia	+395
France	+11,527	Mexico	+383
Russia	+9,155	United States	+343
Malaysia	+9,020	Iran	+173
Chile	+8,216	Indonesia	+162
Turkey	+7,656	Peru	+162
+353,108		+8,045	
World	+480,835	World	+10,502
Top ten	73%	Top ten	77%



Source: [Johns Hopkins](#), 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

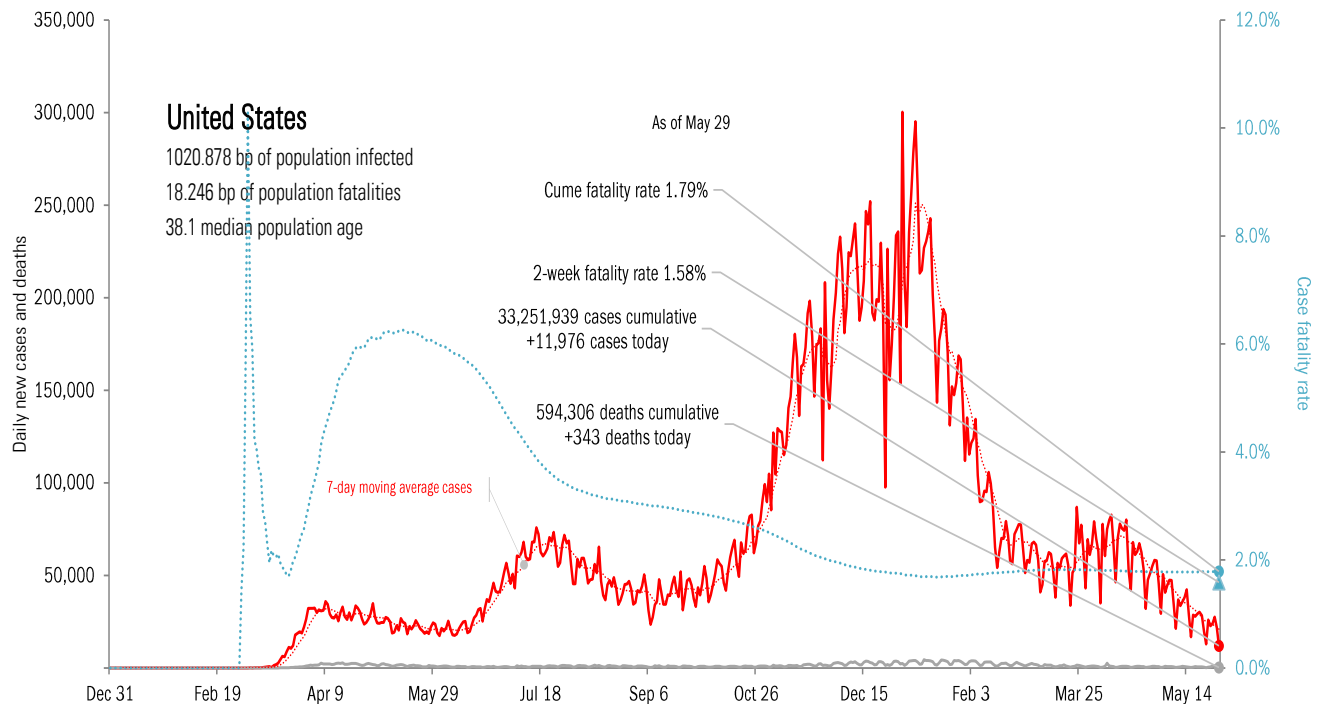
The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
WA	+1,066		MI	+52		LA	+67		CA	3,788,713		CA	63,236		TX	247,997		R	92%	ME	17%
NY	+872		IL	+39		HI	+65		TX	2,952,861		NY	53,269		CA	235,981		MA	84%	WA	15%
CA	+802		TX	+35		GA	+37		FL	2,320,818		TX	51,491		FL	179,681		MO	81%	MI	14%
IL	+800		CO	+24		MO	+22		NY	2,101,055		FL	36,774		NY	134,248		PA	81%	CO	13%
PA	+681		KY	+24		FL	+12		IL	1,380,978		PA	27,190		GA	106,566		MD	80%	WV	13%
CO	+679		AZ	+19		SC	+9		PA	1,202,912		NJ	26,201		PA	89,851		GA	79%	ID	13%
GA	+632		IN	+19		MS	+8		GA	1,123,343		IL	25,166		CH	85,751		MI	79%	MO	12%
CH	+585		CA	+18		NM	+5		CH	1,101,557		GA	20,837		IL	80,728		SC	79%	WY	11%
MI	+569		GA	+17		MT	+4		NJ	1,015,889		MI	20,376		KY	75,247		DC	79%	NM	11%
AZ	+557		NJ	+16		AR	+3		NC	1,001,154		CH	19,861		MI	71,646		CT	78%	MS	11%
+7,243			+263			+232			17,989,280			344,401			1,307,696						
All states	+11,976		+343			-219			All states	33,251,939		594,306			2,328,539			All states	70%	67%	
Top ten	60%		77%			-106%			Top ten	54%		58%			56%			Median	71%	8%	

Some states not reporting

Five most improved US states

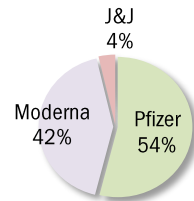
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
FL	-2,338	CH	-108	IN	-85	WA	+93 bp
TX	-1,174	FL	-41	IL	-79	VT	+65 bp
NC	-738	CA	-32	CA	-66	MA	+60 bp
CA	-650	PA	-30	TX	-63	MD	+53 bp
LA	-354	GA	-29	OK	-50	OR	+49 bp



Source: [Johns Hopkins](#), [Dept. of Health and Human Services](#), [CDC](#), TrendMacro calculations

Rolling out the vaccines in the US and the world

US overall	Total				Today	Immunity	Full	Partial
Doses distributed	378,796,465				+3.951 million	US	40.2%	50.0%
Doses administered	302,798,758				+1.640 million	UK	36.7%	57.6%
Administered	One dose	% Pop	Immune	% pop	New immune today	France	16.1%	37.1%
Total population	171,636,084	51%	138,318,994	41%	+0.903 million	Spain	18.8%	37.9%
Age 12 to 17	5,998,630	24%	2,215,509	9%	+0.045 million	Germany	16.9%	42.8%
Age 18 to 64	117,060,693	58%	93,775,970	46%	+0.749 million	Italy	19.4%	37.9%
Age 65 and over	48,524,846	89%	42,318,576	77%	+0.109 million	Australia	1.9%	14.4%
						Israel	59.3%	63.0%
						Canada	5.2%	56.2%
						Japan	2.4%	6.4%
						Africa	0.6%	1.8%
						India	3.1%	11.9%
						Brazil	10.3%	21.2%



State
Immunities distributed as % population**
At least partial immunity as % population
Full immunity as % population



At today's dosing pace, every American >18 immune in **107 days** by Sep 13, 2021

65.1% of population >18 immunized
14.0% previously tested positive
79.1% vs 60% adult herd immunity*

Global data differs from sources, timing

AK
59.1%
46.0%
39.2%

ME
70.3%
63.1%
54.4%

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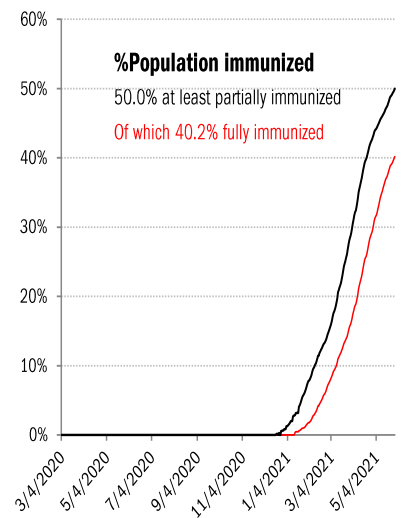
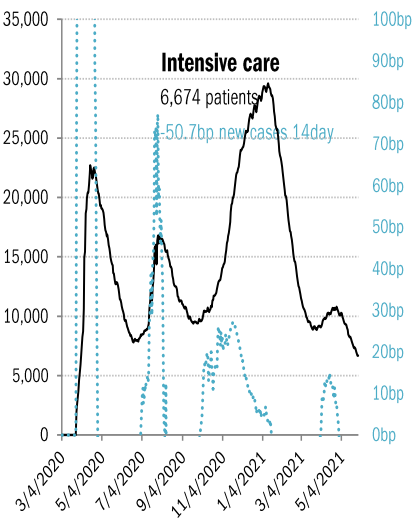
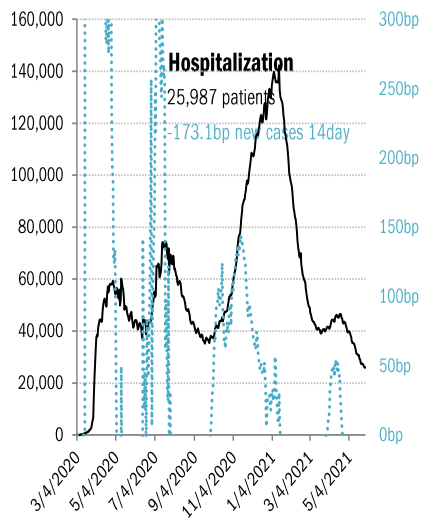
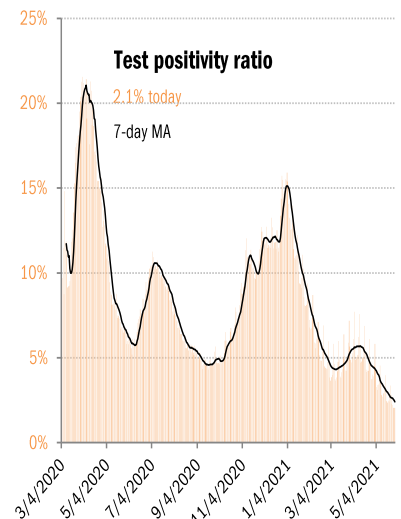
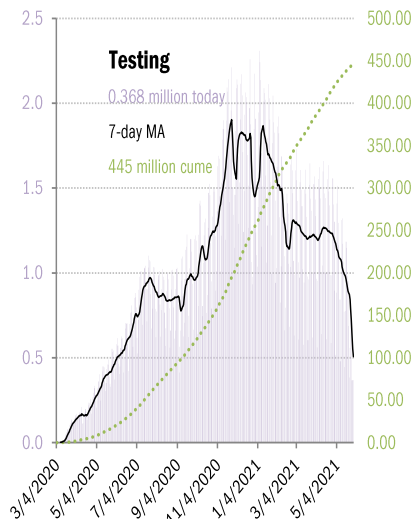
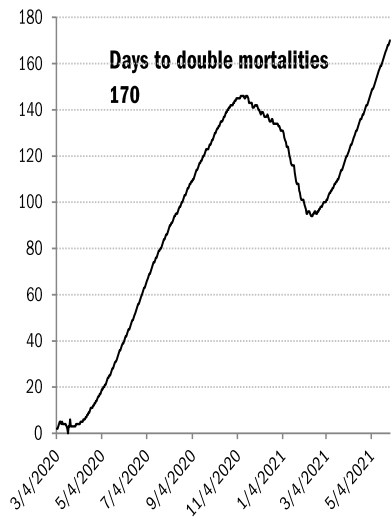
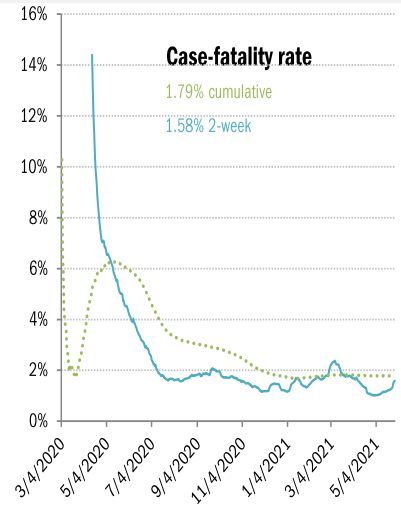
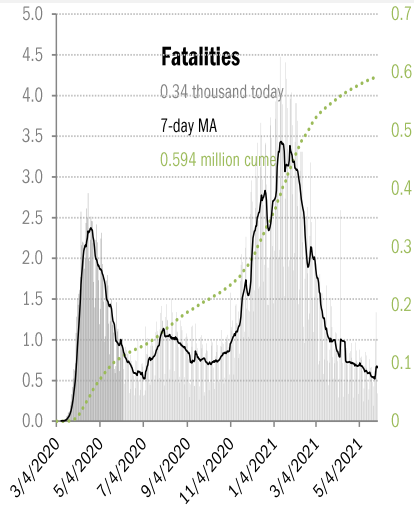
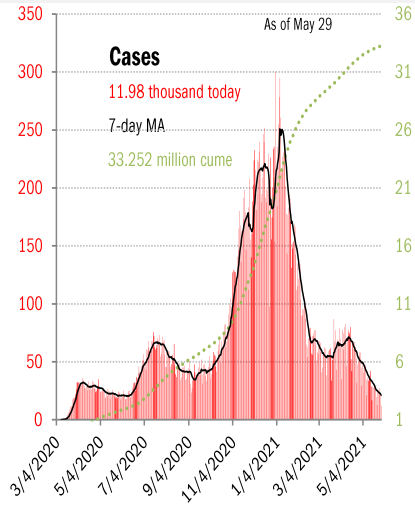
* Includes persons >18 fully immunized or previously tested positive, no overlap. Disregards untested positives, natural immunities.

** One dose of Pfizer/Moderna counts as half an immunity, one dose of J&J as a full immunity

Source: [CDC](#), [CDC](#), [Our World in Data](#), TrendMacro calculations

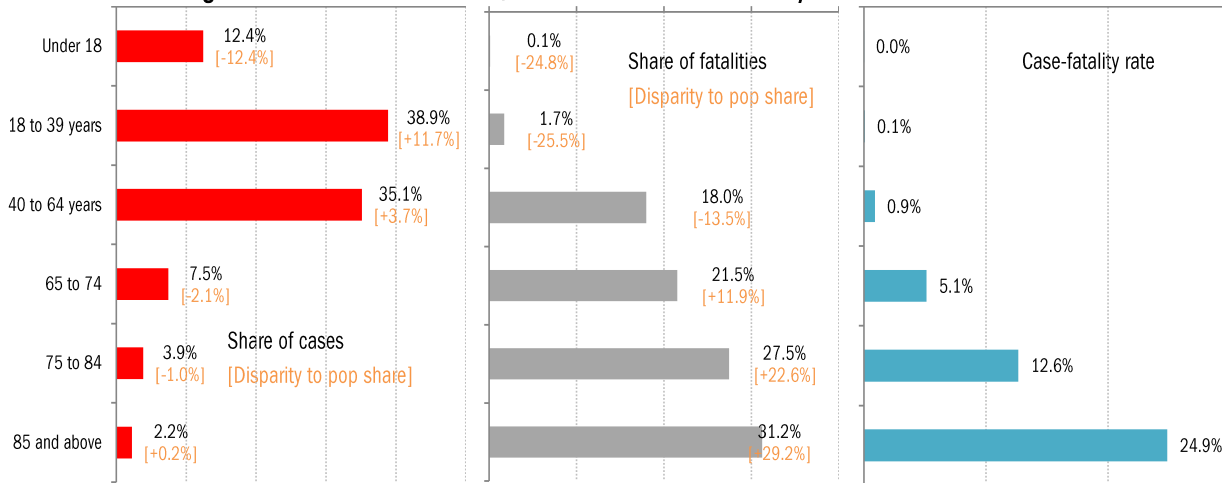
US deep-dive

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

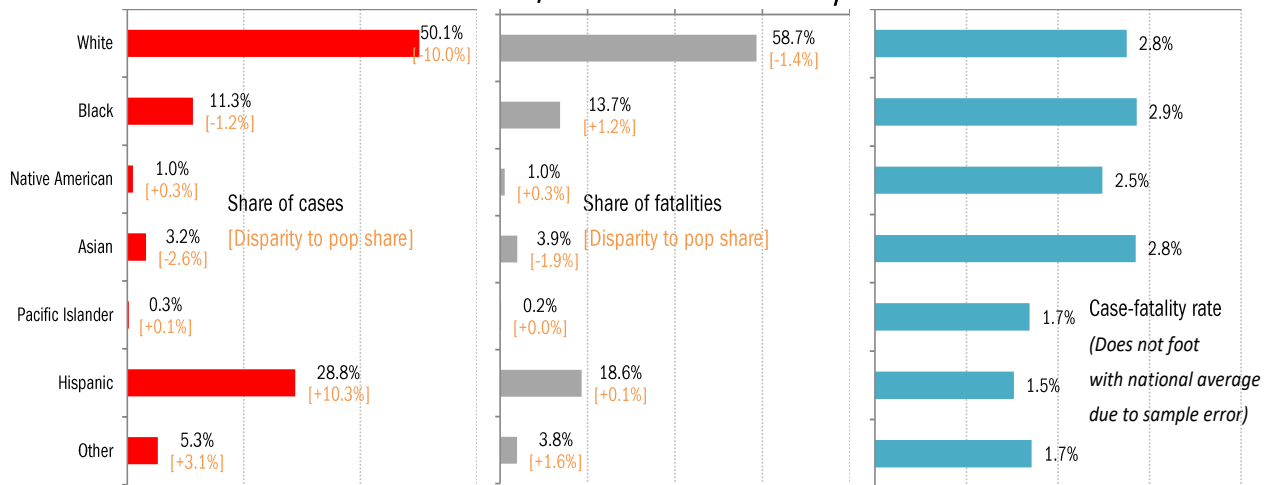


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations

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

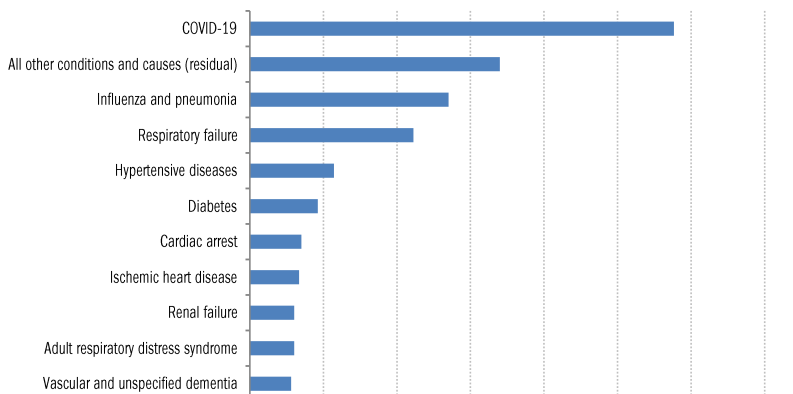


Racial distribution of US cases, fatalities and case-fatality rates Cumulative



Comorbidities

Top-ten joint causes of Covid mortalities, cumulative



As of May 23

For over 5% of these deaths, COVID-19 was the only cause mentioned on the death certificate. For deaths with conditions or causes in addition to COVID-19, on average, there were 4.0 additional conditions or causes per death.

Recommended reading

[70 Percent Covid Vaccination Rate May Be in Reach, New Poll Suggests](#)

Jan Hoffman
New York Times
May 28, 2021

['What Do I Do Next?': Orphaned by Covid, Two Teens Find Their Way](#)

Corina Knoll
New York Times
May 29, 2021

[House Hunters Are Leaving the City, and Builders Can't Keep Up](#)

Conor Dougherty and Ben Casselman
New York Times
May 29, 2021

[Why It's So Hard to Fill Jobs in Certain States](#)

Eric Morath and Stephanie Stamm
Wall Street Journal
May 29, 2021

[Cambridge pathologist, Dr. Hodkinson interview: Covid 19 vaccines, infertility and Spike protein dangers](#)

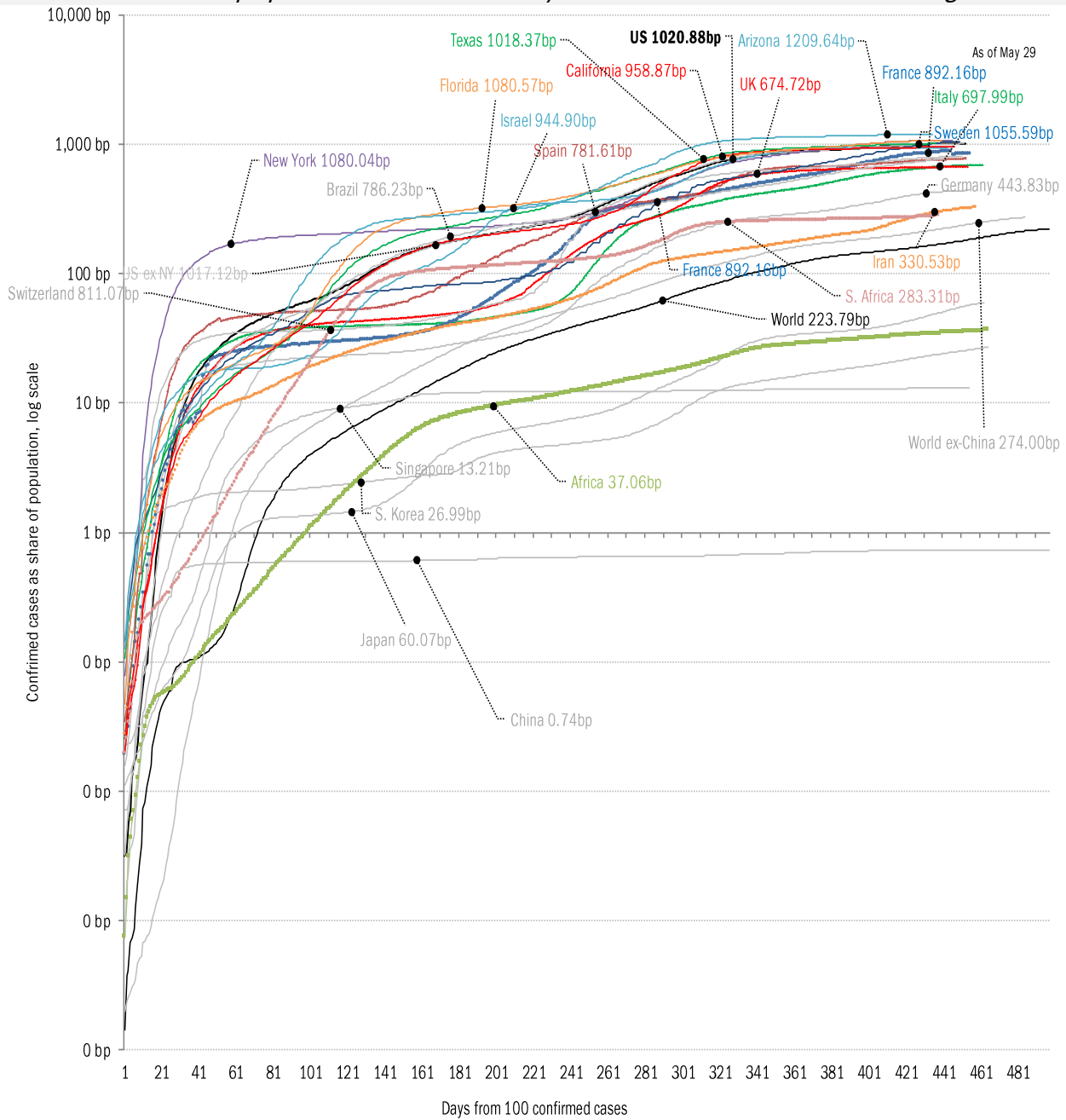
Eeyore
Vlad Tepes Blog
May 29, 2021

Meme of the day



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

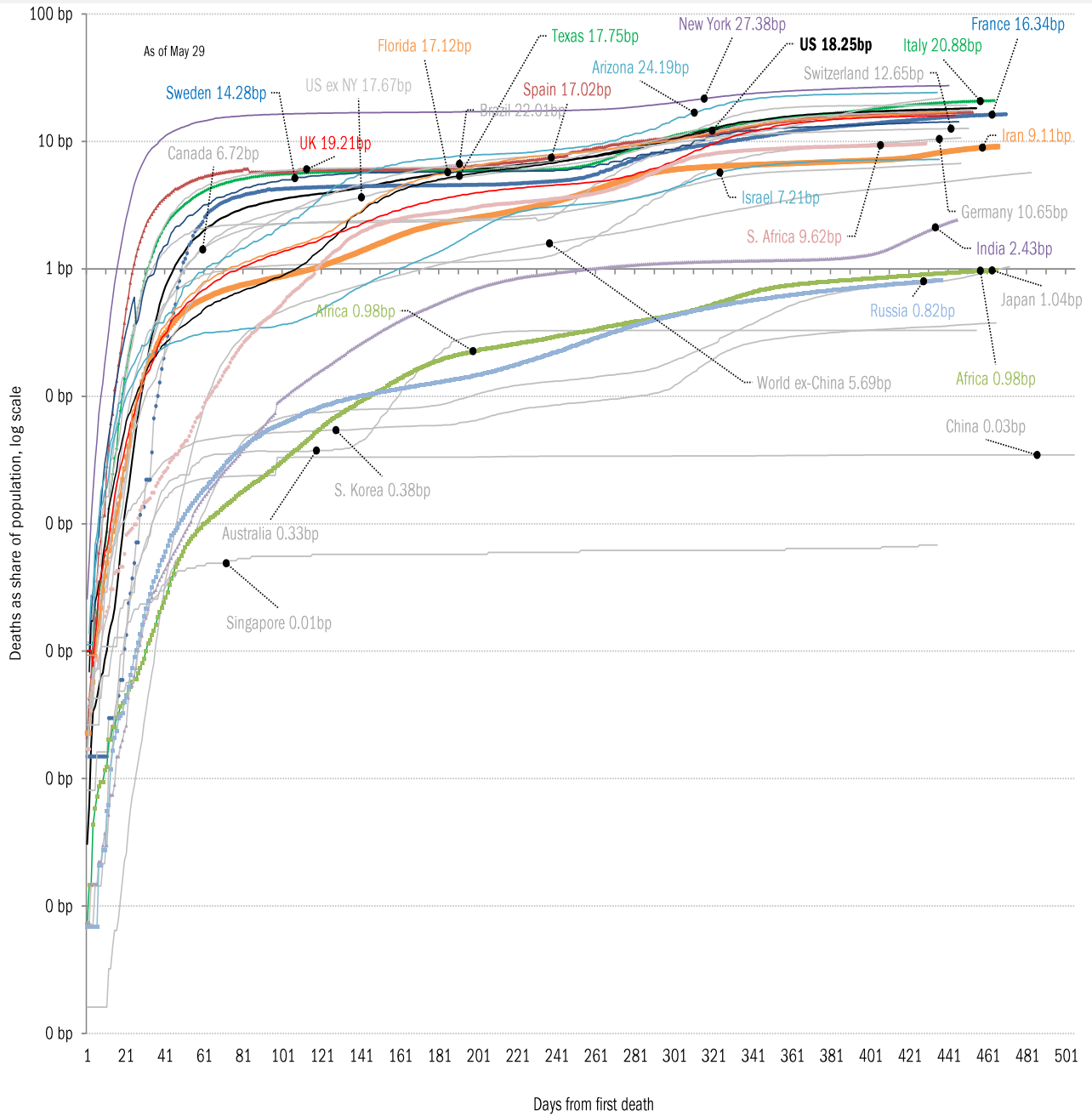
The coronavirus case accelerometer... tracking the world's infection curves
Share of infected population from first day with 100 confirmed cases, log scale



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

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

Share of deceased population from day of first fatality

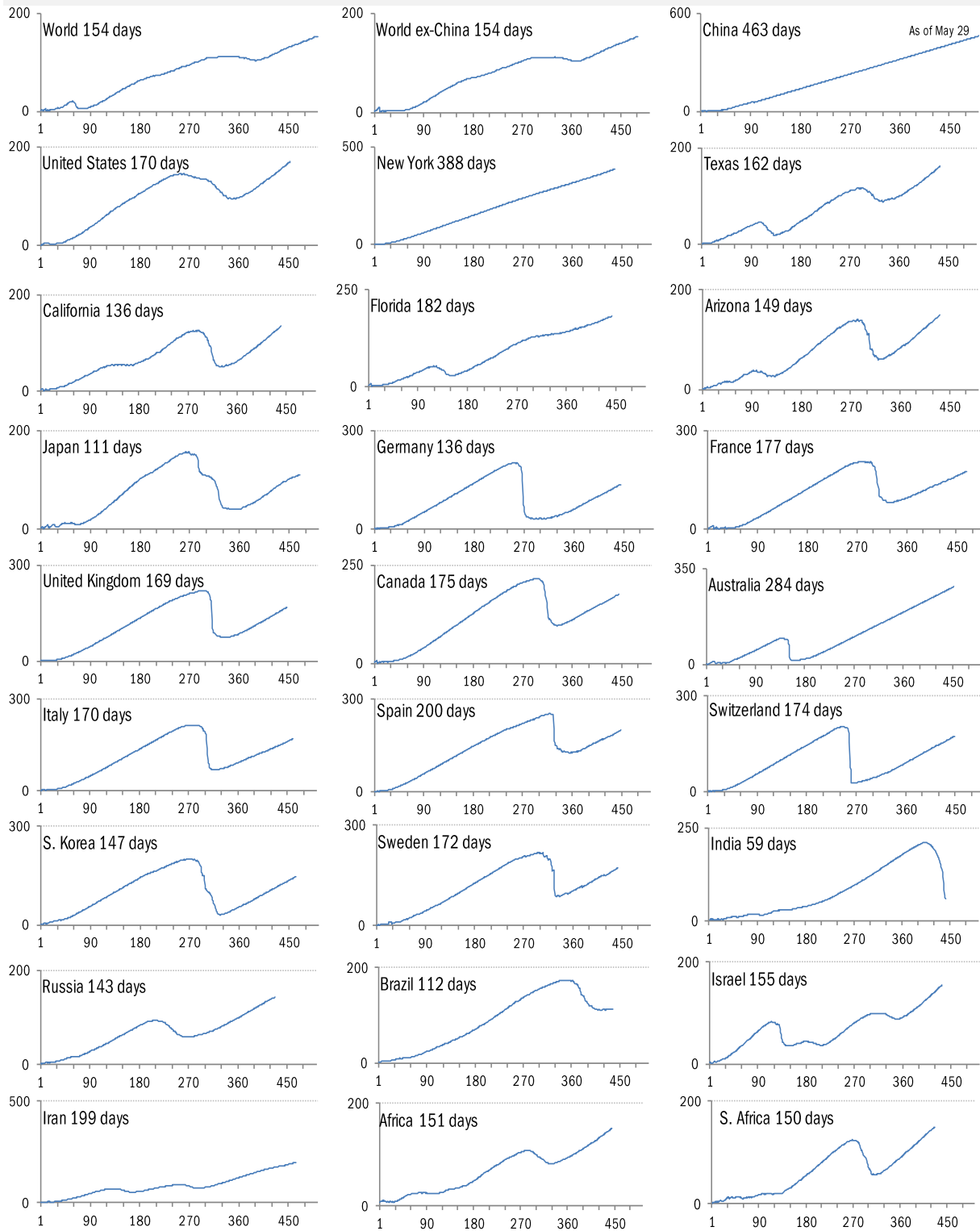


Source: [Johns Hopkins](#), TrendMacro calculations

"Exponential"? Our most reliable evidence of the rate of spread of Covid-2019

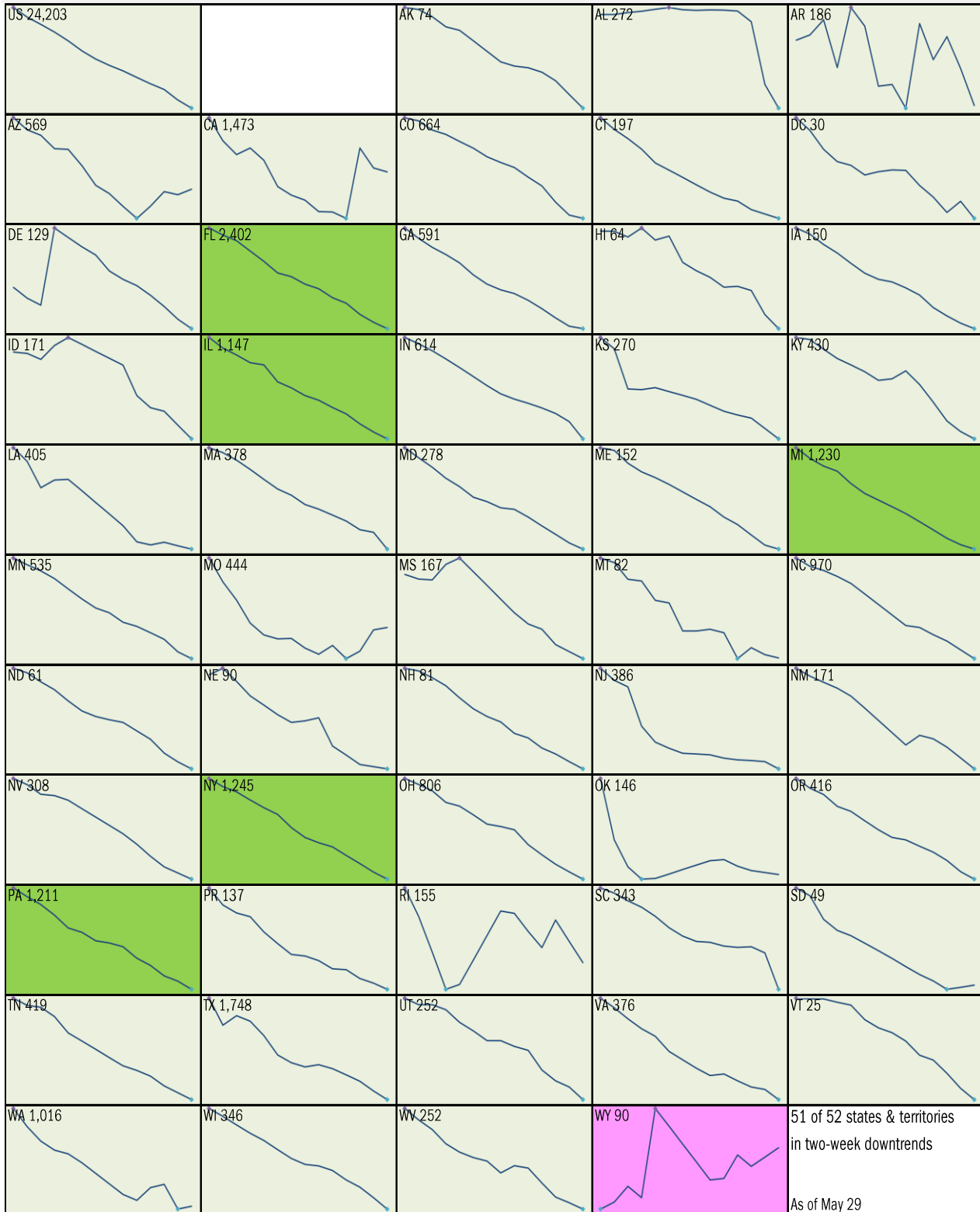
Vertical: days to double deaths Horizontal: days from first death

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



Source: [Johns Hopkins](#), 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

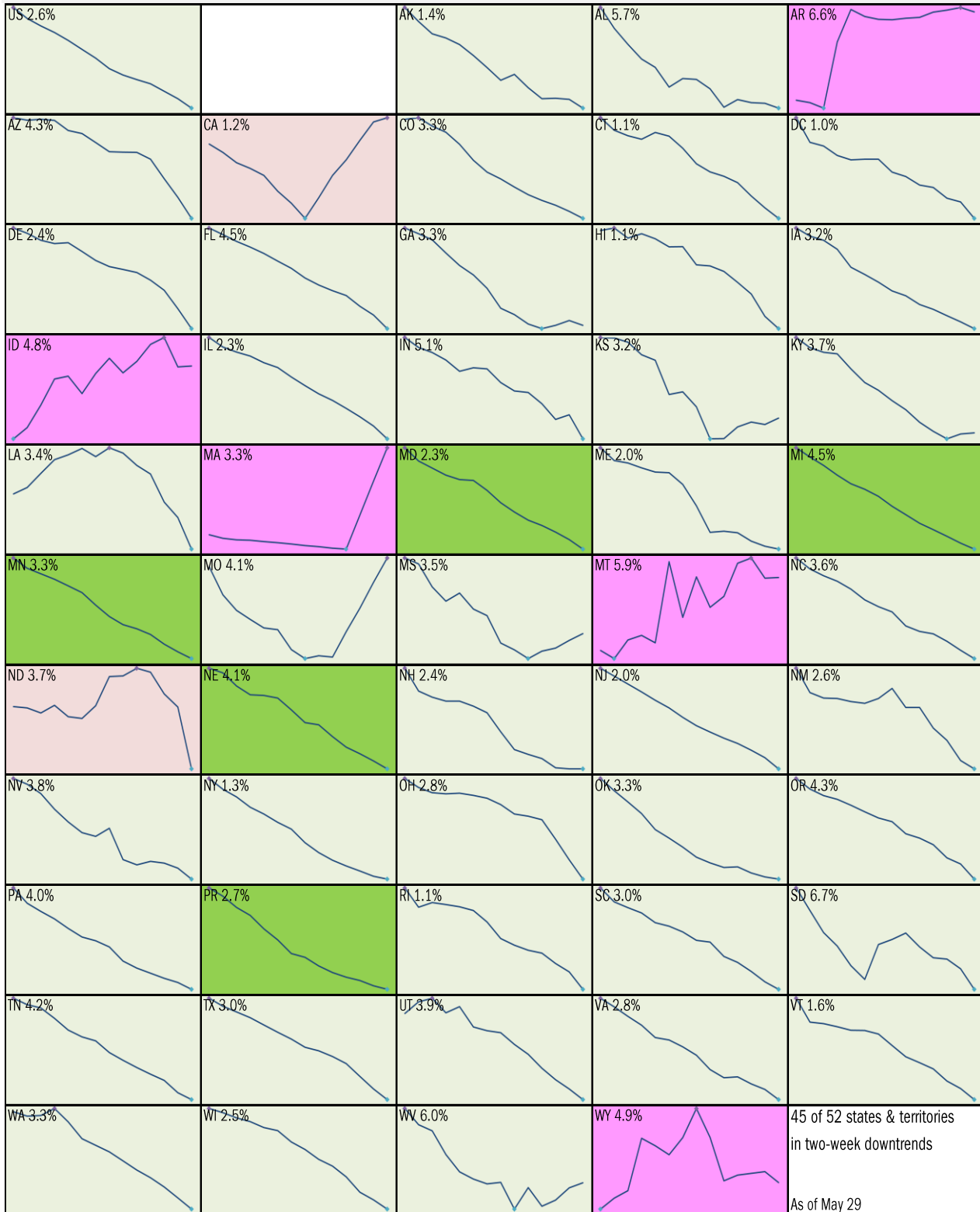


Source: [Johns Hopkins](#), TrendMacro calculations

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

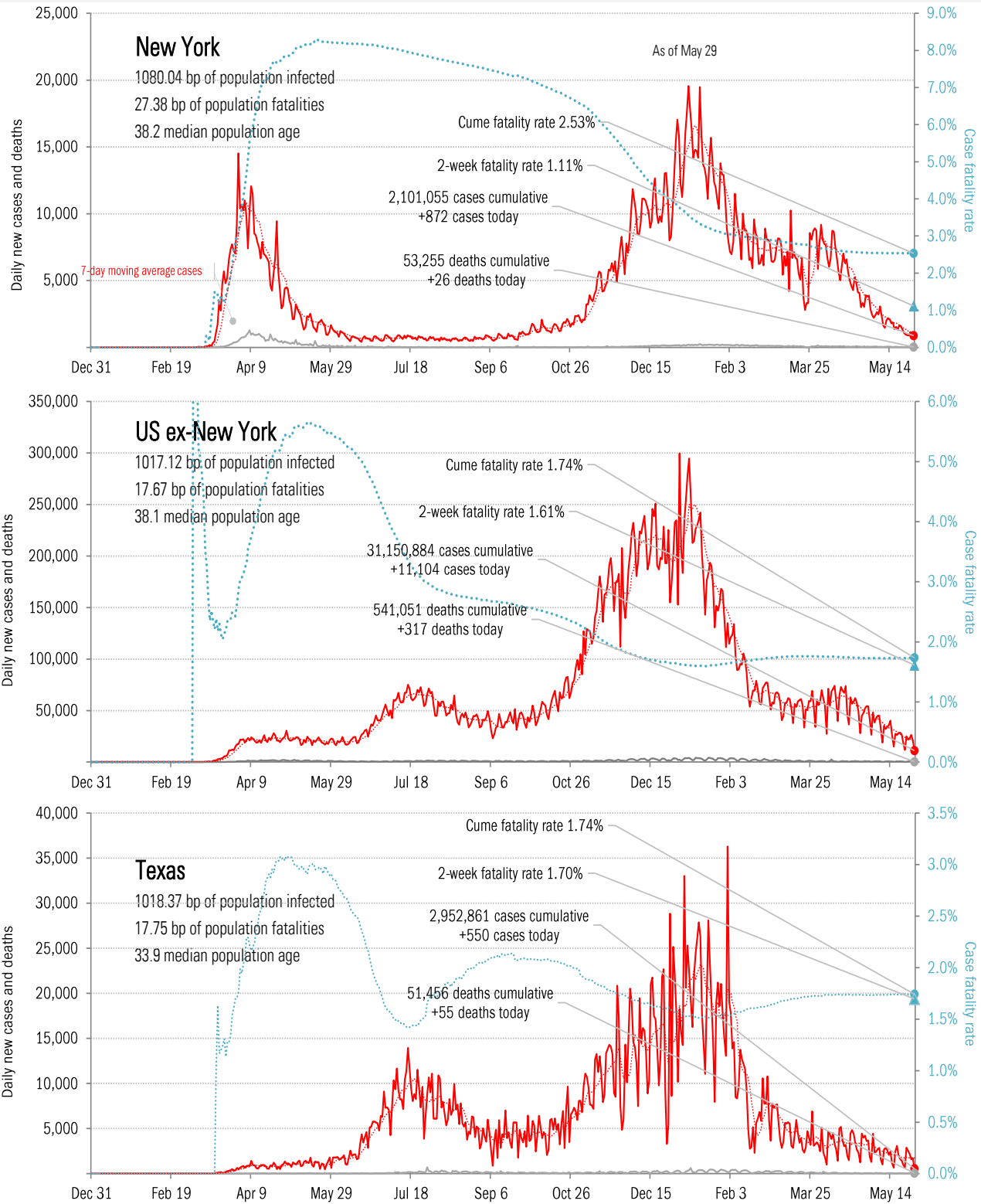
14-day moving average, last 14 days Most recent value displayed ● High ● Low

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



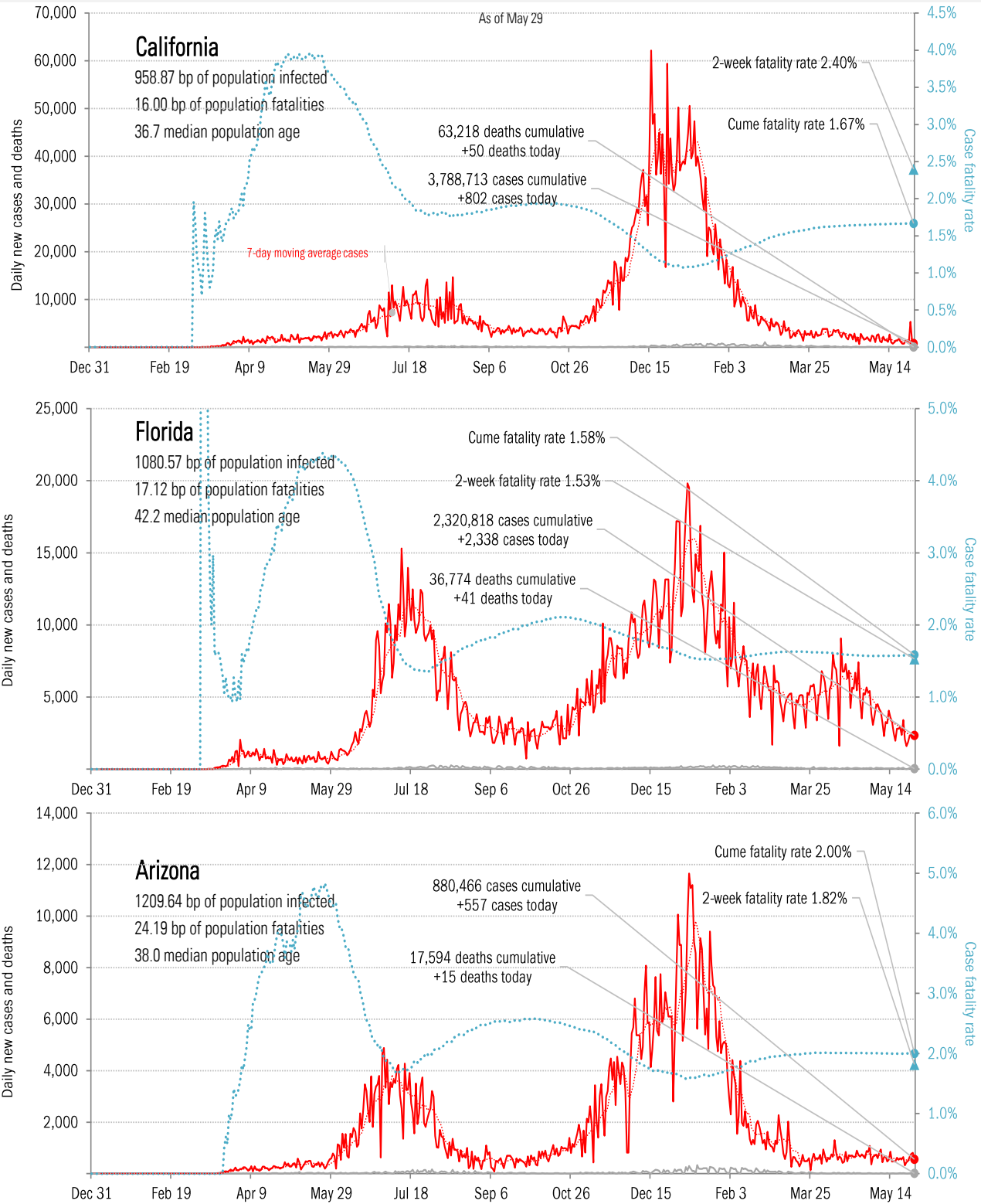
Source: [Covid Act Now](#), TrendMacro calculations

From Ground Zero to the Rio Grande



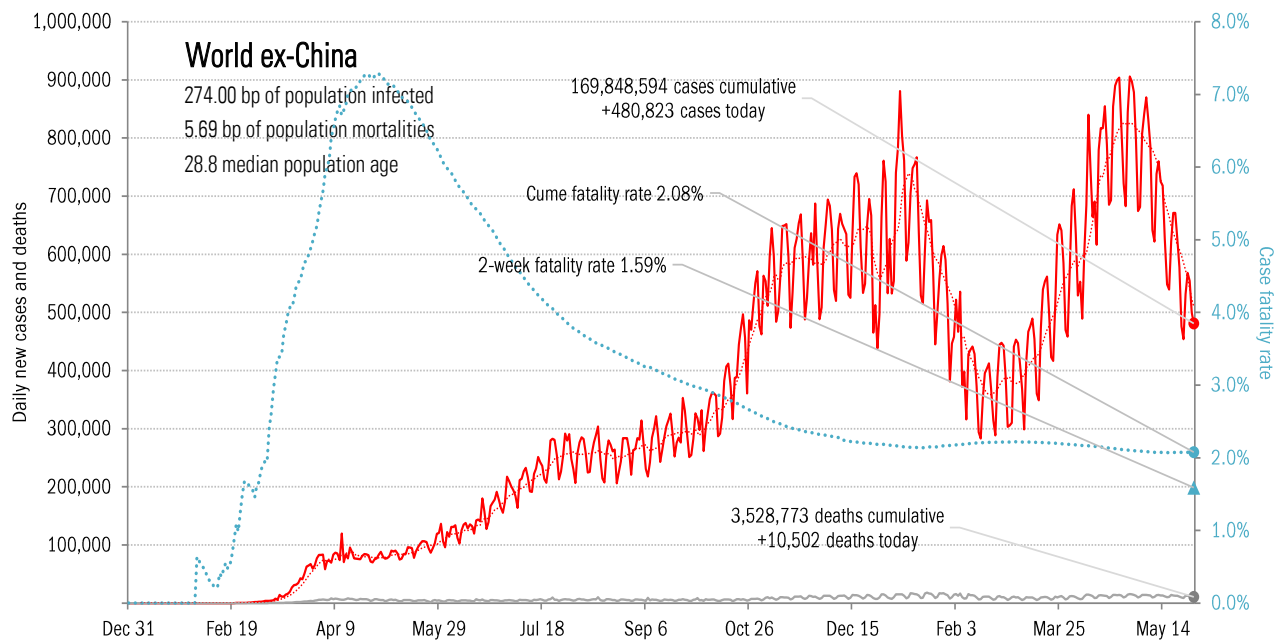
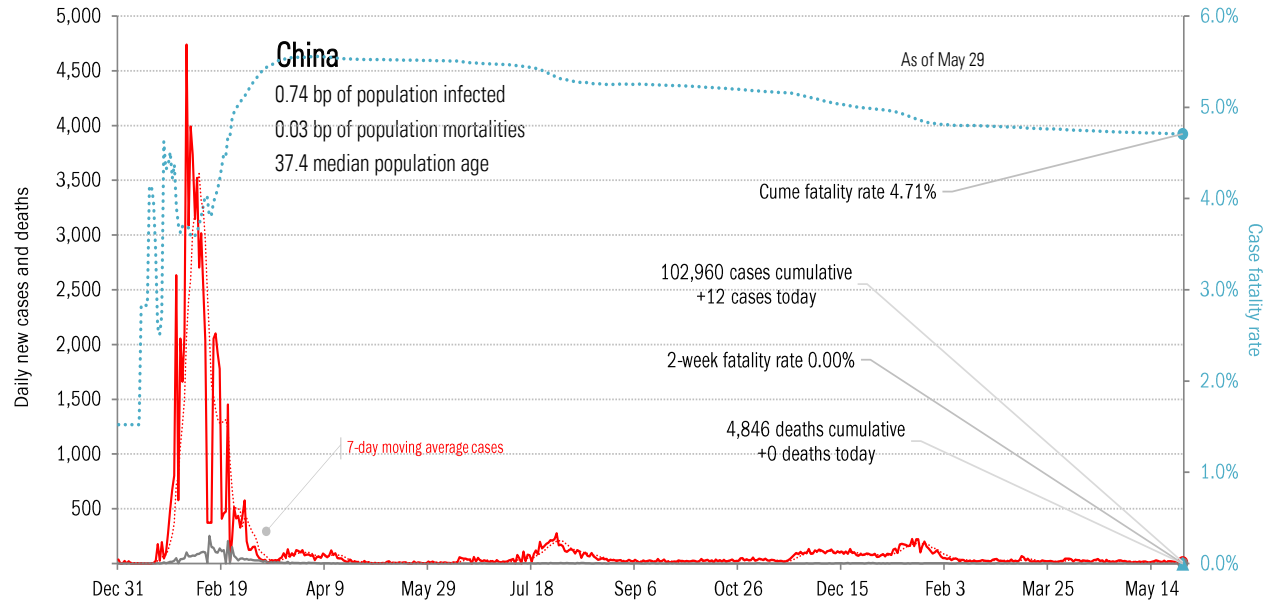
Source: [Johns Hopkins](#), TrendMacro calculations

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



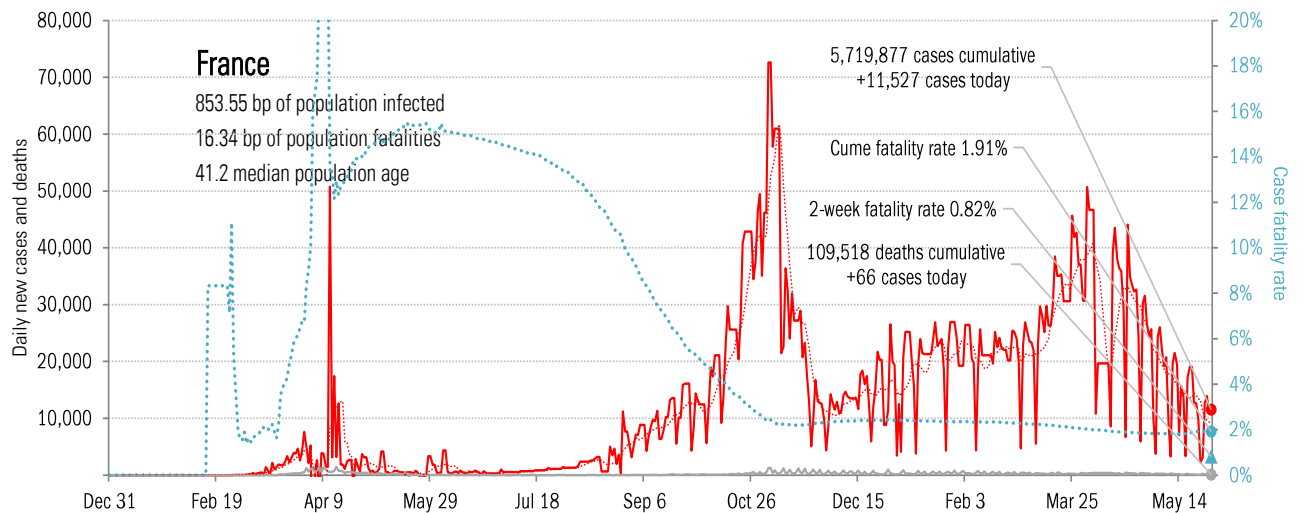
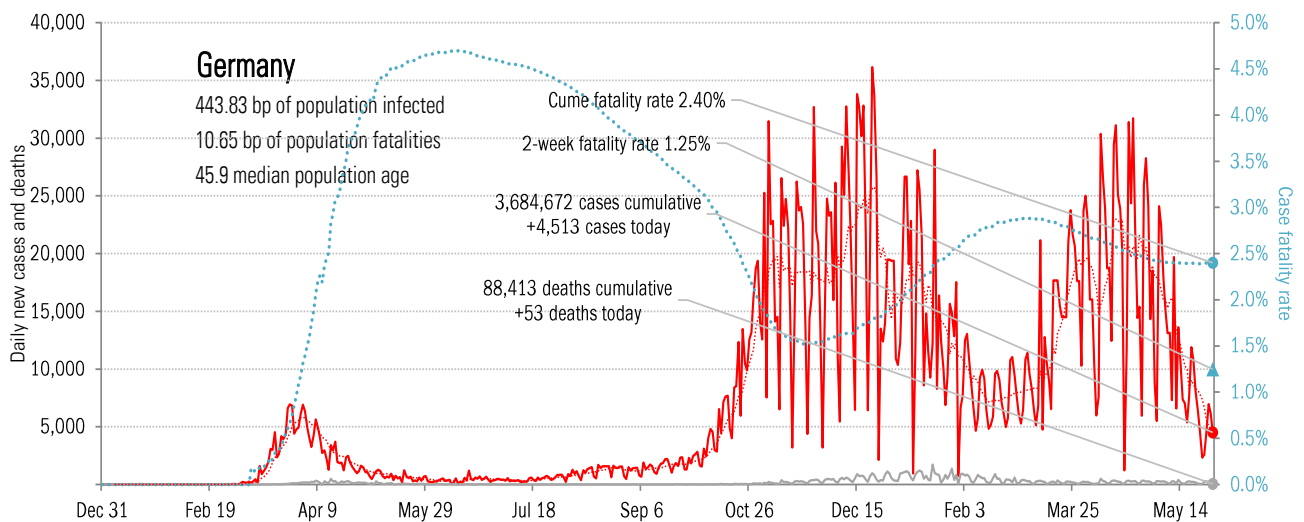
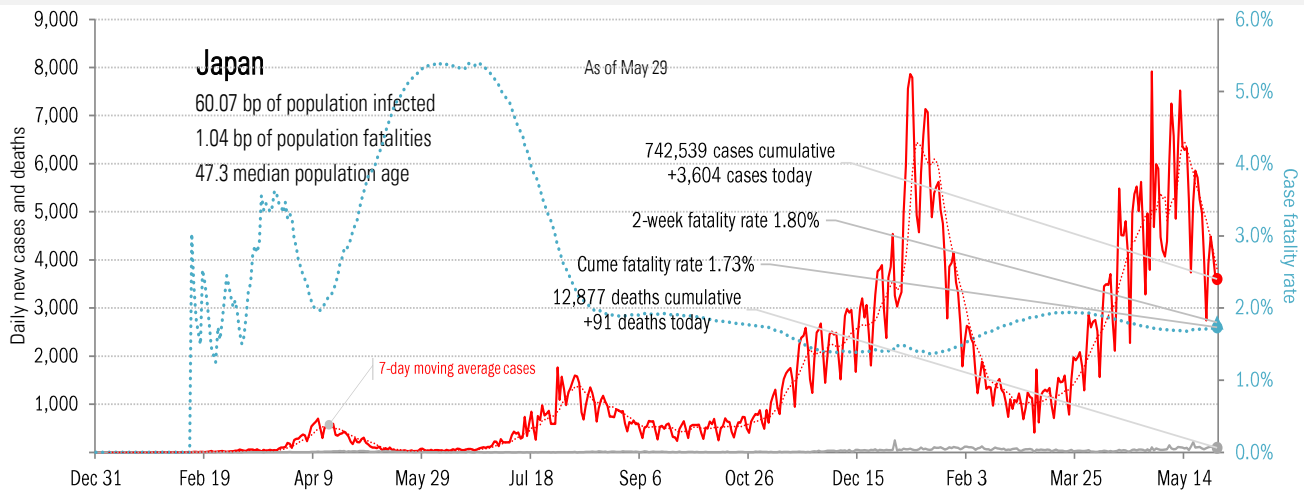
Source: [Johns Hopkins](#), TrendMacro calculations

Patient zero... and then everyone else



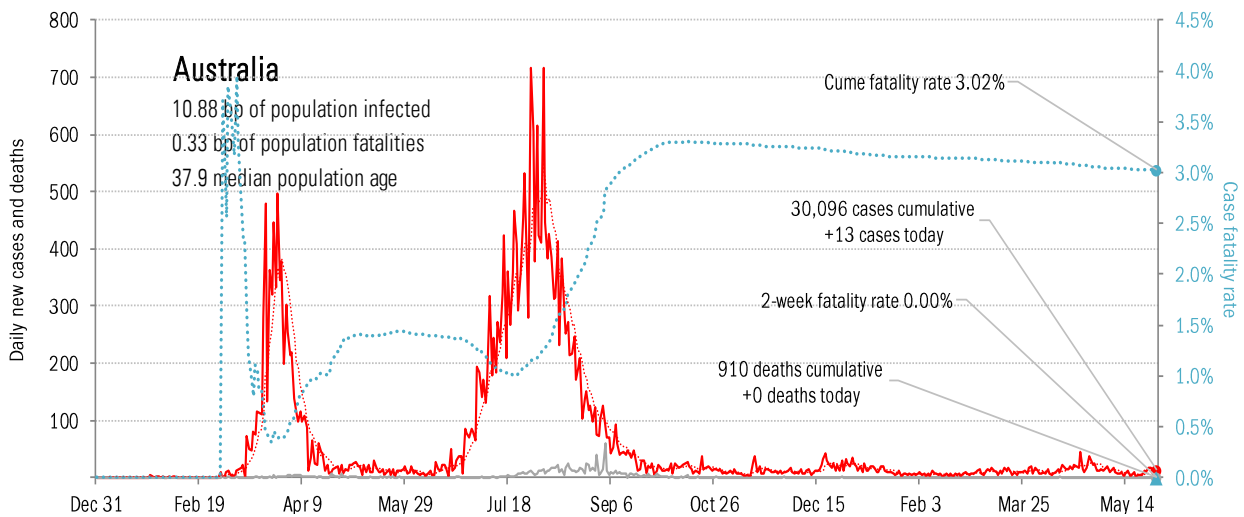
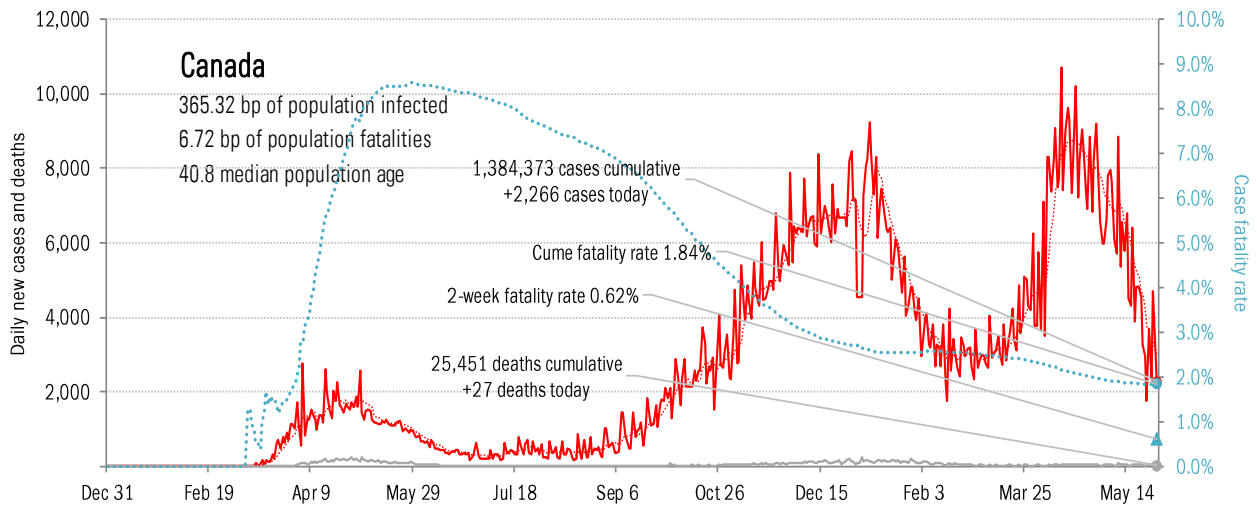
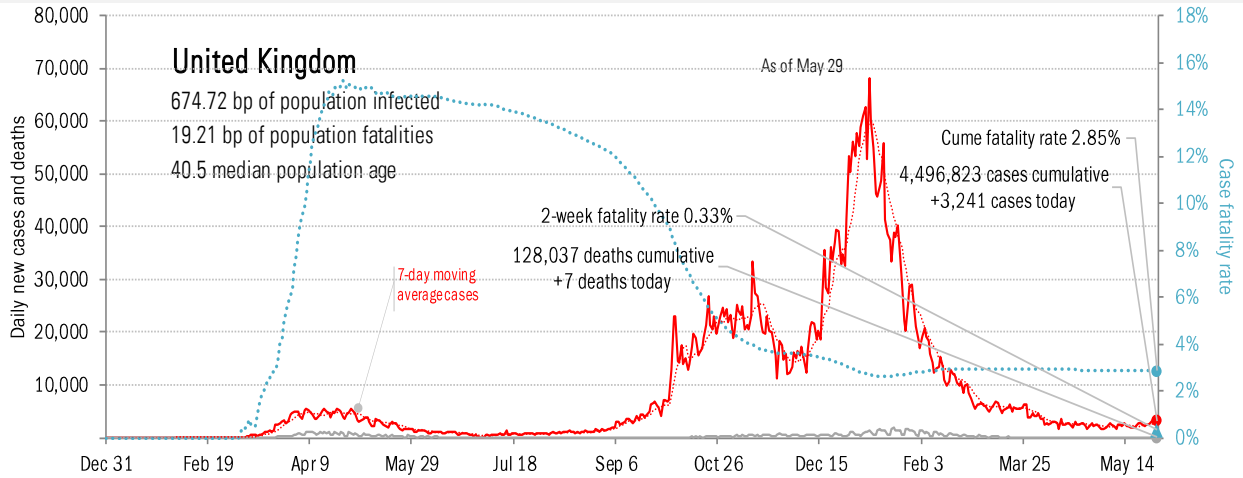
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the largest economies



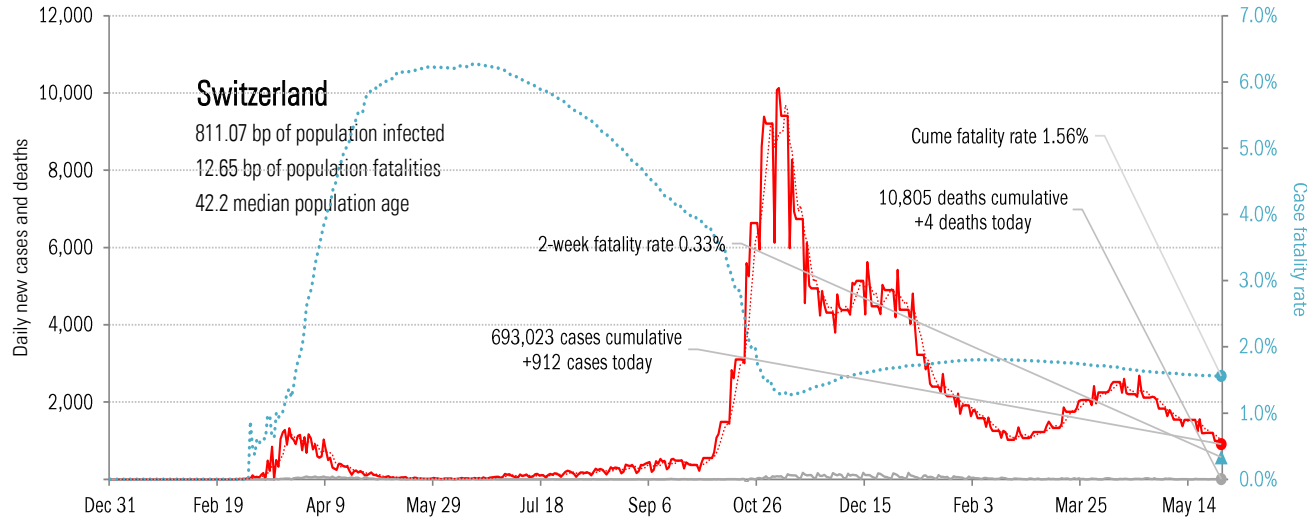
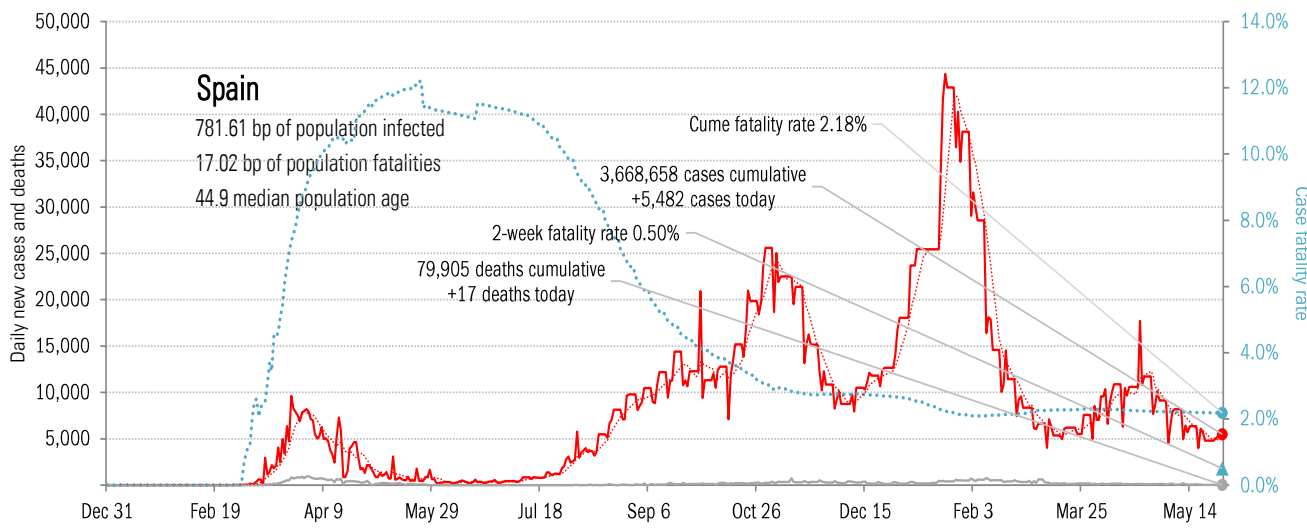
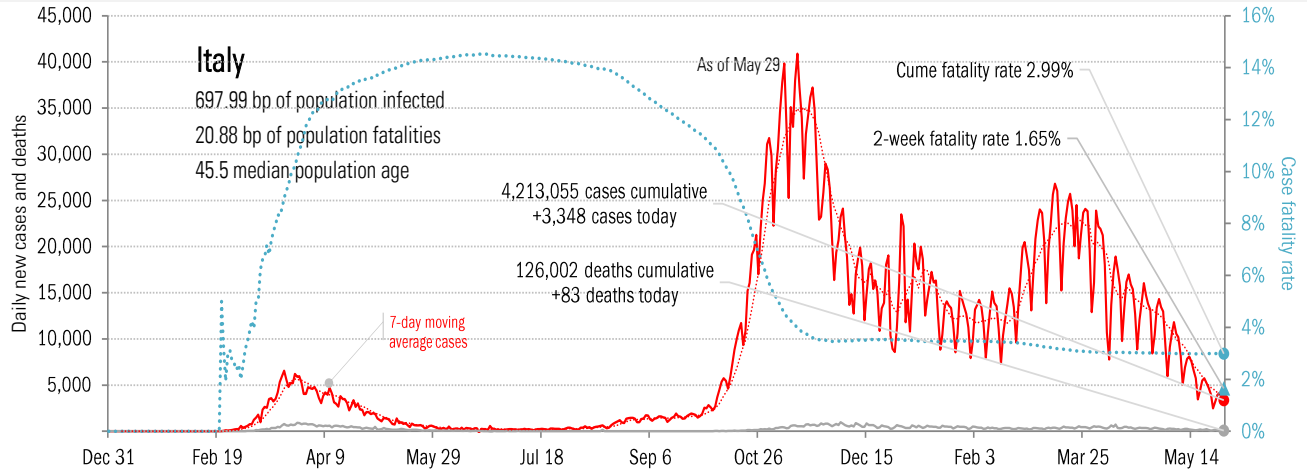
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in The Anglosphere



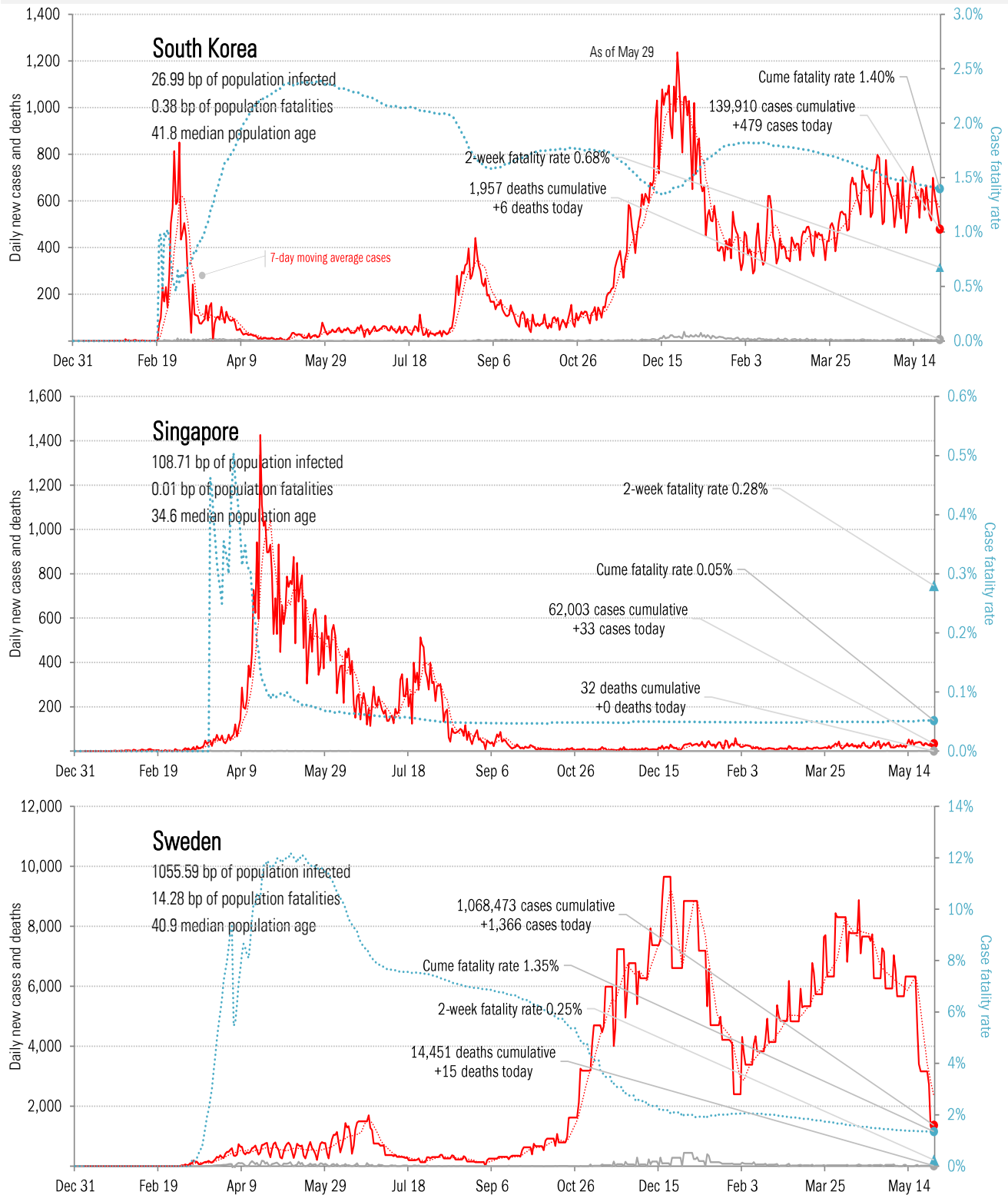
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in continental Europe



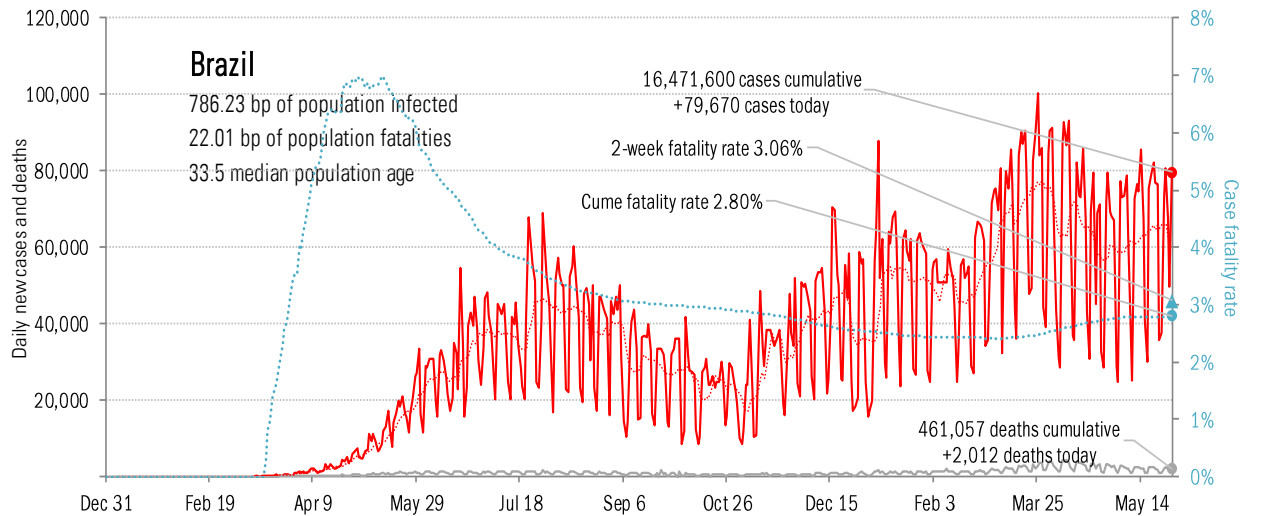
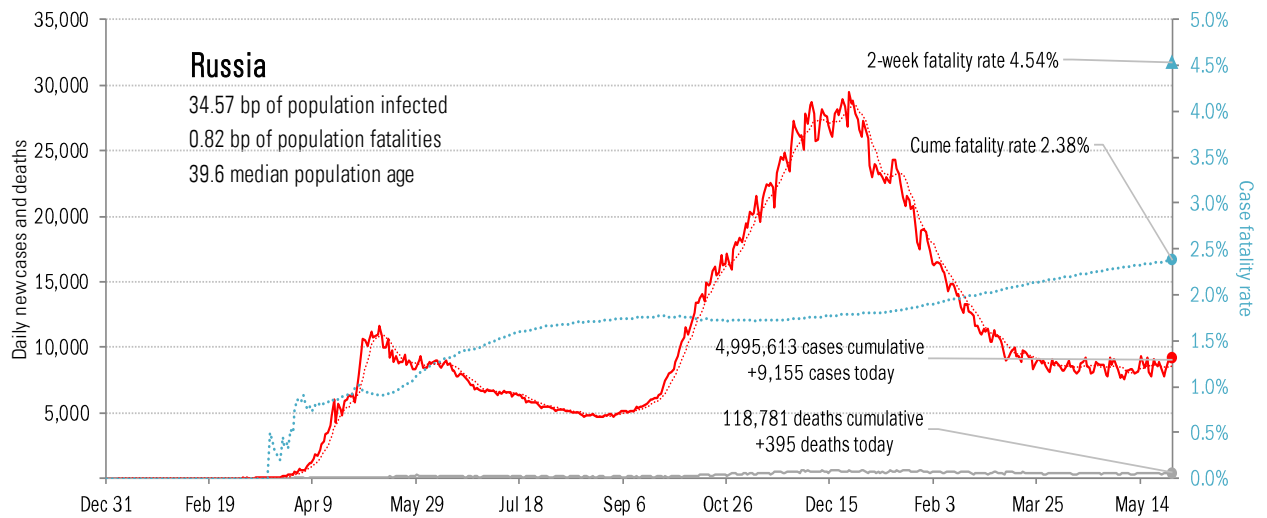
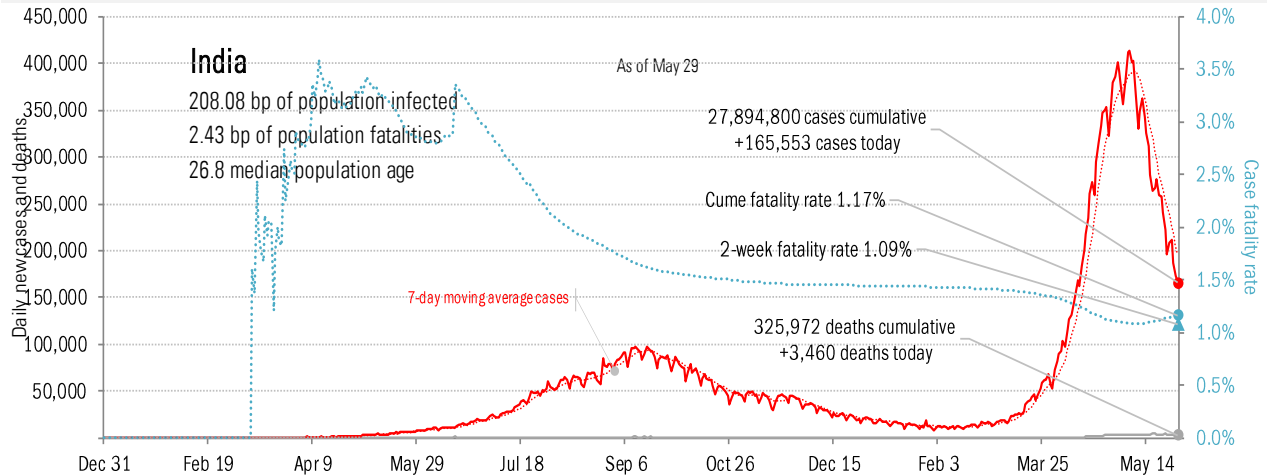
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in other hot-spots



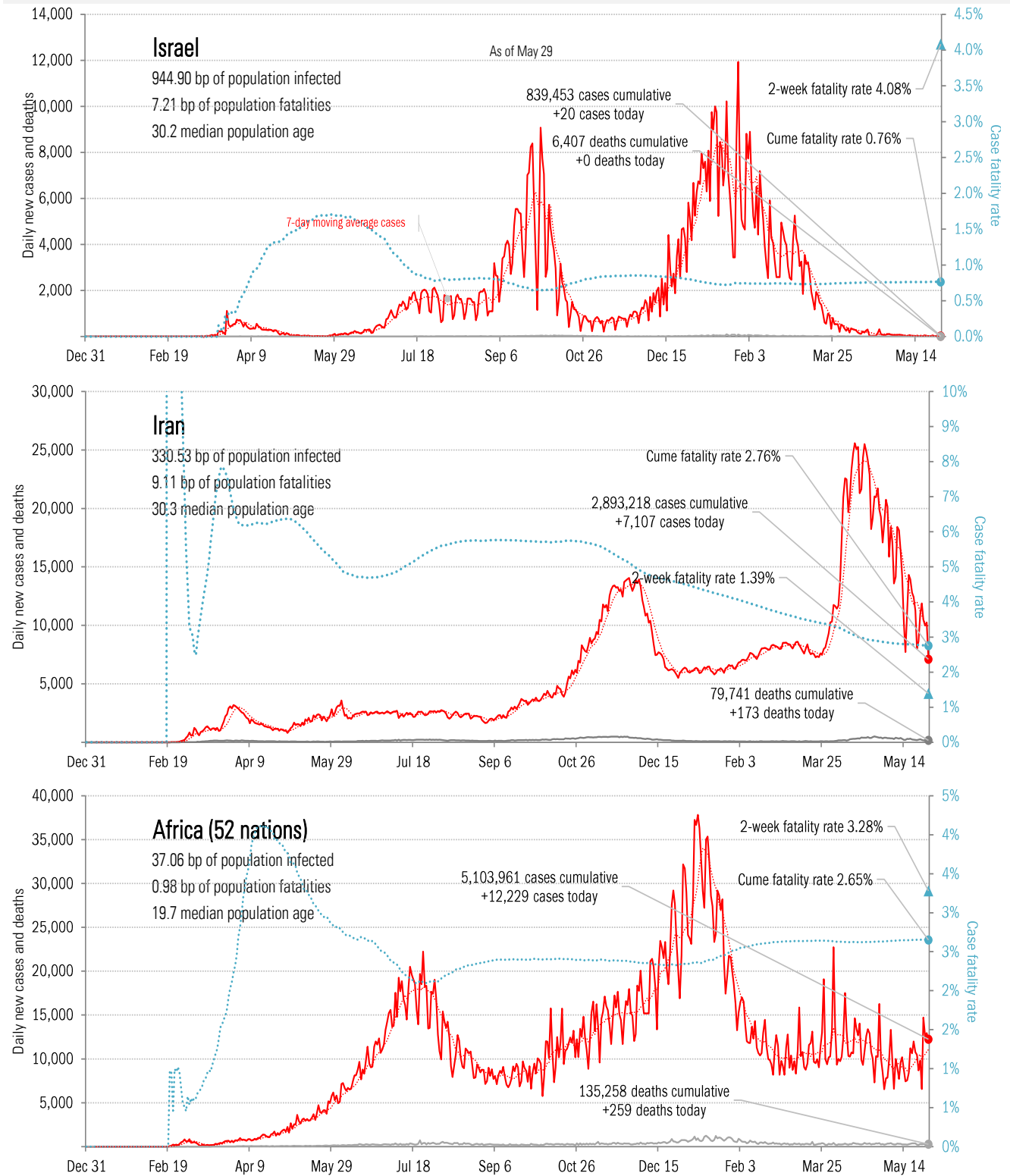
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the BRICs ex-China



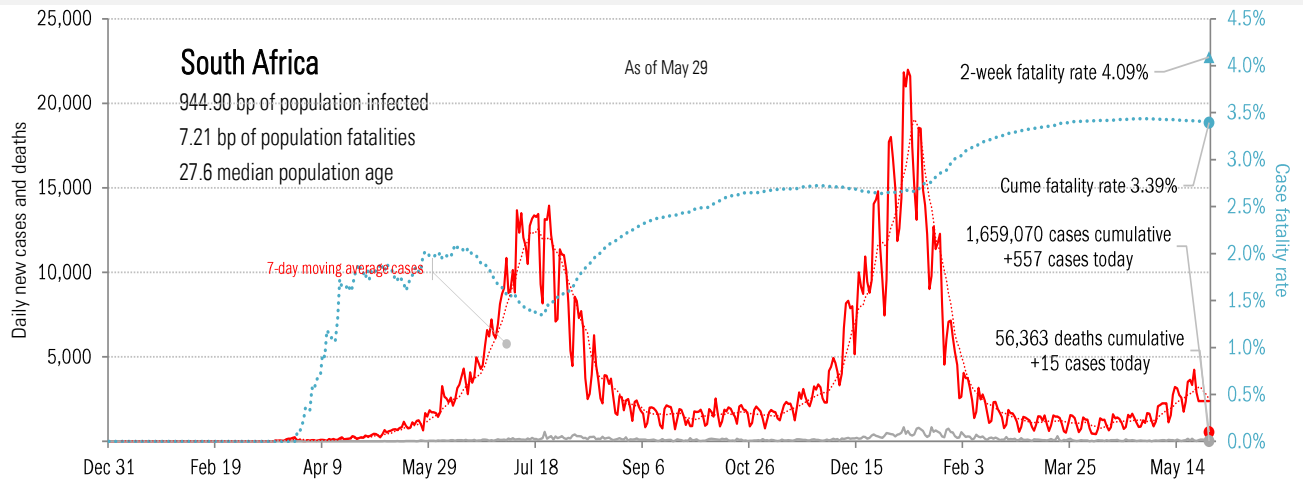
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the Middle East and Africa



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

Impact in Africa, continued



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