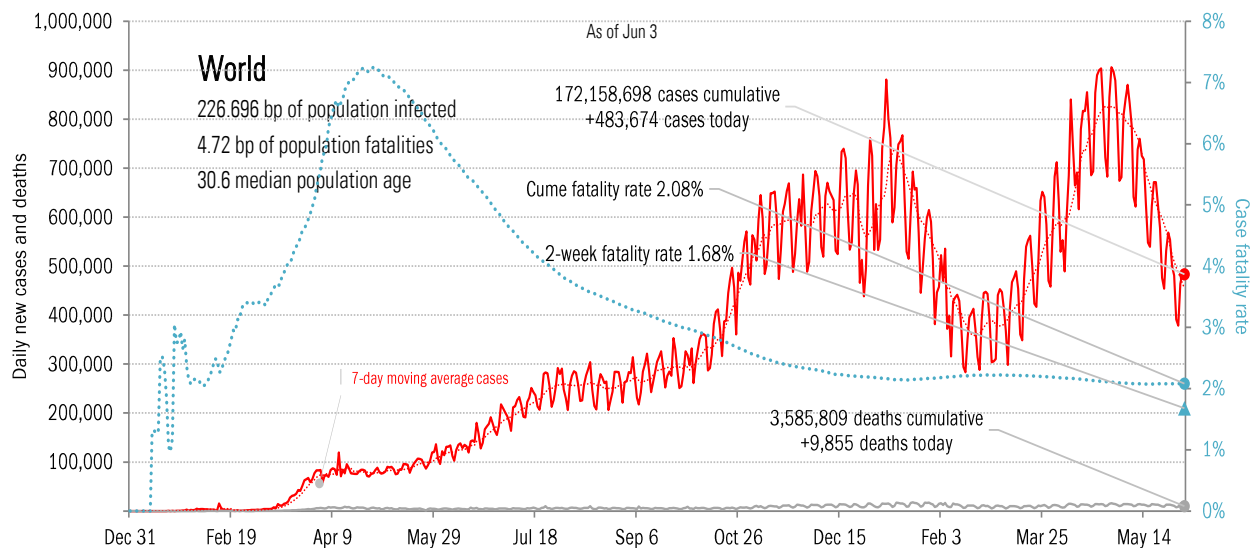
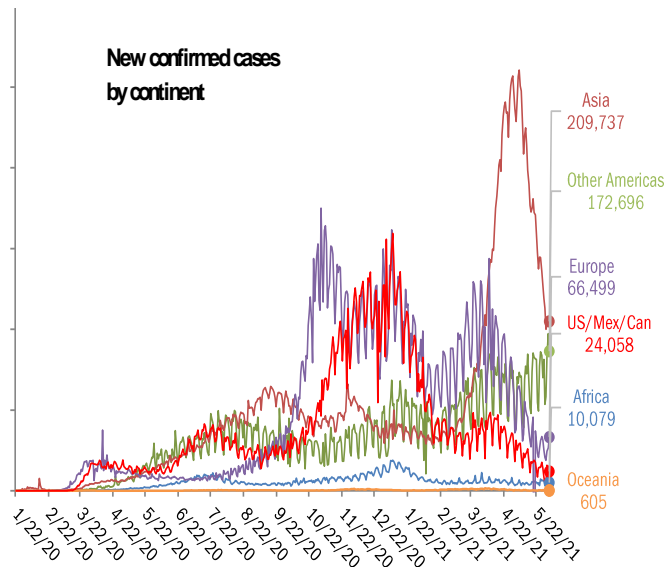


## Data Insights: Covid-2019 Monitor

Friday, June 4, 2021

### The global scorecard

The worst ten countries			
New cases		New Deaths	
India	+132,364	India	+2,713
Brazil	+83,391	Brazil	+1,682
Argentina	+32,291	United States	+601
Colombia	+28,624	Argentina	+553
United States	+18,991	Colombia	+545
France	+15,684	Russia	+387
Iran	+9,657	Mexico	+216
Russia	+8,807	Chile	+213
Sweden	+8,520	Philippines	+199
Malaysia	+8,209	Indonesia	+187
<b>+346,538</b>		<b>+7,296</b>	
World	+483,674	World	+9,855
Top ten	72%	Top ten	74%



Source: [Johns Hopkins](#), 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

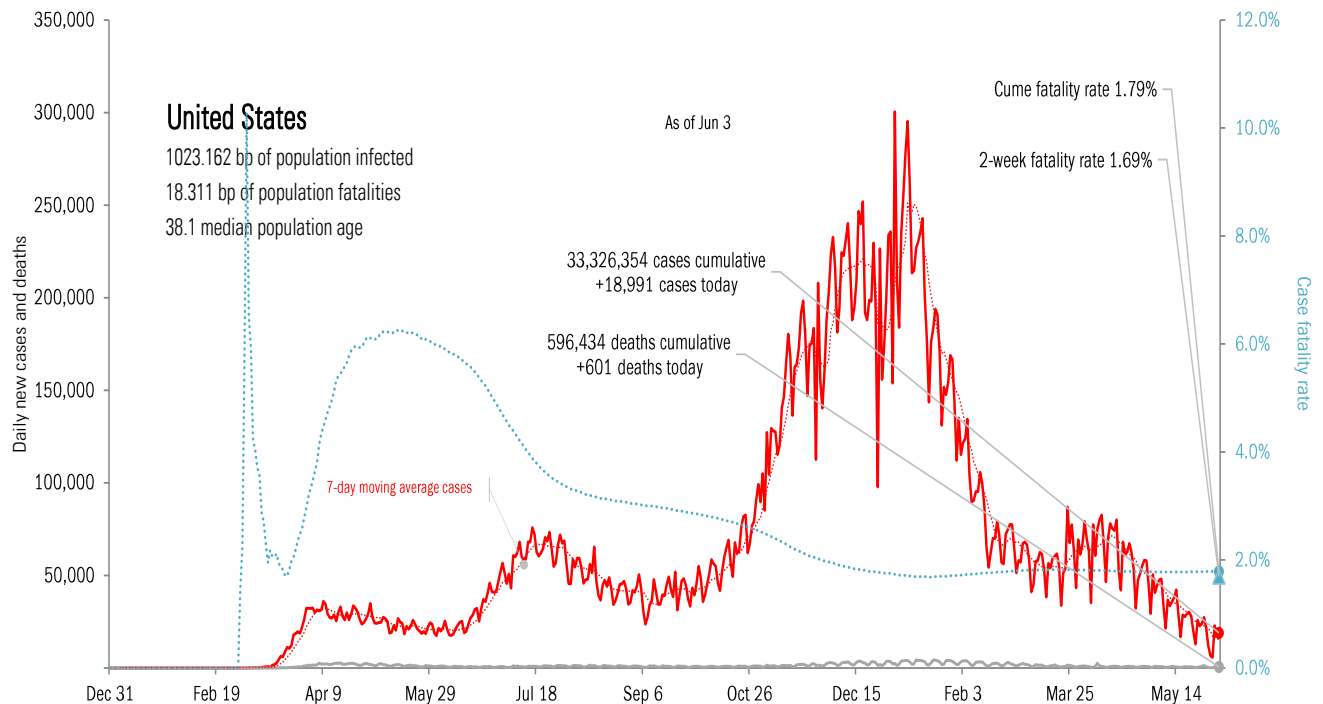
## The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
TX	+2,595		MI	+62		LA	+67		CA	3,792,962		CA	63,345		TX	247,997		R	92%	ME	17%
FL	+1,878		TX	+58		HI	+65		TX	2,959,171		NY	53,357		CA	235,981		MA	84%	WA	15%
IN	+1,216		CA	+51		GA	+37		FL	2,329,867		TX	51,633		FL	179,681		MO	81%	MI	14%
CA	+1,073		FL	+49		MO	+22		NY	2,103,768		FL	36,973		NY	134,248		PA	81%	CO	13%
WA	+867		PA	+36		FL	+12		IL	1,383,647		PA	27,295		GA	106,566		MD	80%	WV	13%
CO	+845		GA	+33		SC	+9		PA	1,208,879		NJ	26,253		PA	89,851		GA	79%	ID	13%
PA	+746		WI	+29		MS	+8		GA	1,125,017		IL	25,265		CH	85,751		MI	79%	MO	12%
IL	+668		IL	+24		NM	+5		CH	1,103,380		GA	20,900		IL	80,728		SC	79%	WY	11%
MO	+616		AL	+21		MT	+4		NJ	1,017,044		MI	20,485		KY	75,247		DC	79%	NM	11%
MI	+530		IN	+20		AR	+3		NC	1,003,989		CH	19,923		MI	71,646		CT	78%	MS	11%
+11,034			+383			+232			18,027,724			345,429			1,307,696						
All states	+18,991		+601			-219			All states	33,326,354		596,434			2,328,539			All states	70%	67%	
Top ten	58%		64%			-106%			Top ten	54%		58%			56%			Median	71%	8%	

Some states not reporting

## Five most improved US states

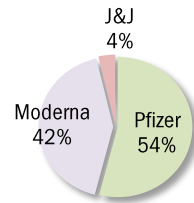
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
AZ	-593	CH	-62	IN	-85	FR	+33 bp
KS	-433	MO	-31	IL	-79	MA	+32 bp
LA	-328	OK	-25	CA	-66	WA	+31 bp
SC	-162	NJ	-22	TX	-63	NJ	+30 bp
AL	-123	AZ	-15	OK	-50	MD	+26 bp



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	380,875,325				+1.416 million	US	40.9%	50.6%
Doses administered	306,864,283				+0.835 million	UK	38.9%	58.6%
Administered	One dose	% Pop	Immune	% pop	New immune today	France	17.4%	39.4%
Total population	173,587,882	52%	140,569,471	42%	+0.504 million	Spain	21.3%	40.0%
Age 12 to 17	6,447,305	26%	2,351,289	9%	+0.035 million	Germany	19.9%	45.5%
Age 18 to 64	118,395,948	58%	95,675,466	47%	+0.405 million	Italy	20.8%	40.7%
Age 65 and over	48,648,419	89%	42,533,404	78%	+0.063 million	Australia	2.2%	16.1%
						Israel	59.4%	63.0%
						Canada	6.4%	59.7%
						Japan	3.0%	8.7%
						Africa	0.7%	1.9%
						India	3.2%	12.6%
						Brazil	10.6%	21.9%



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 **205 days** by Dec 24, 2021

66.1% of population >18 immunized  
14.0% previously tested positive  
**80.1%** vs 60% adult herd immunity\*

Global data differs from sources, timing

AK
59.4%
46.4%
39.5%

ME
70.7%
63.7%
55.2%

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As of Jun 3

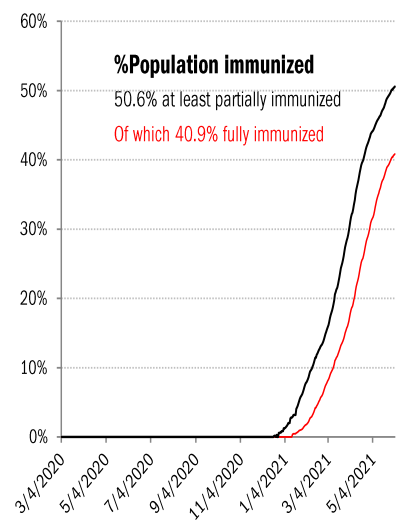
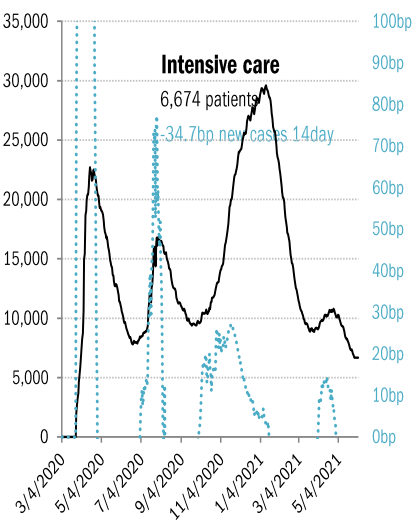
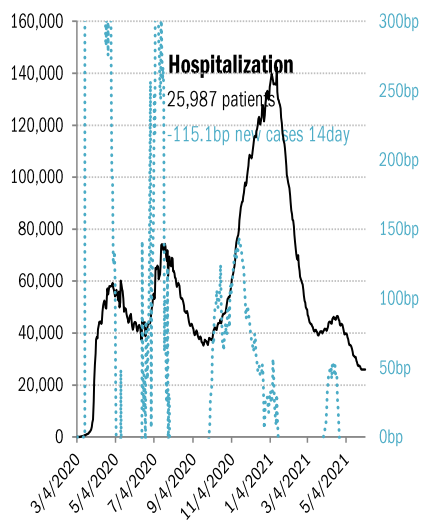
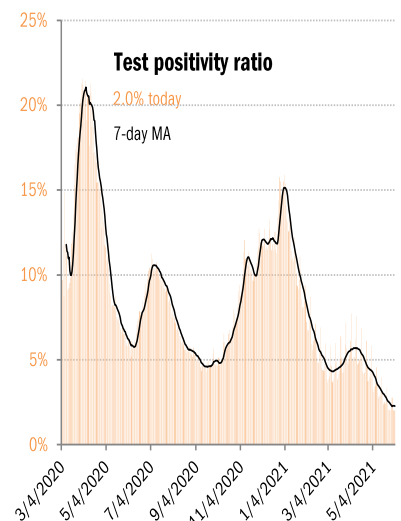
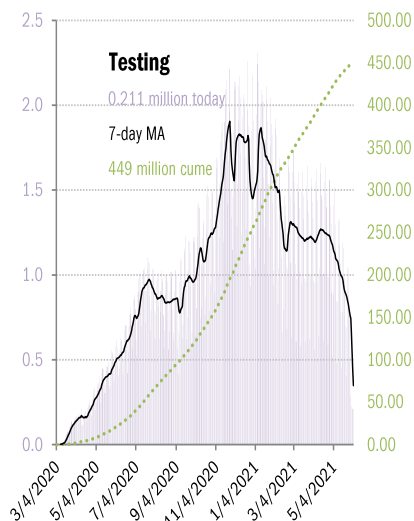
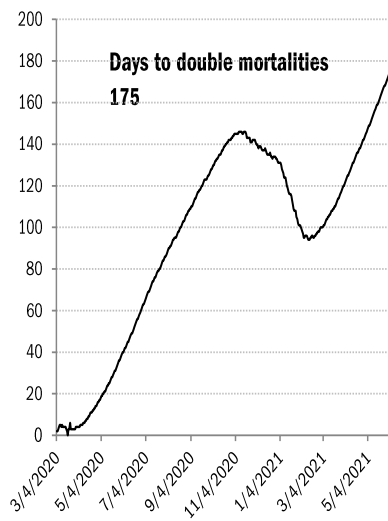
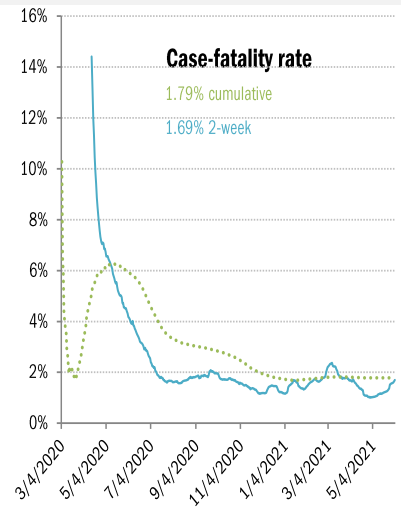
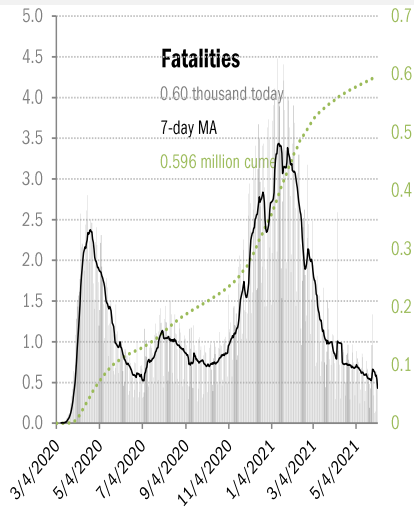
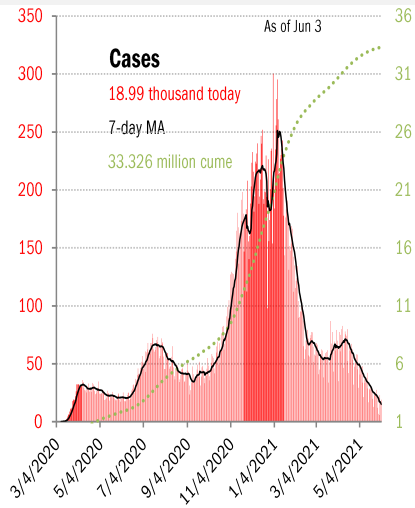
\* Includes persons >18 fully immunized or previously tested positive, no overlap. Disregards untested positives, natural immunities.

\*\* 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

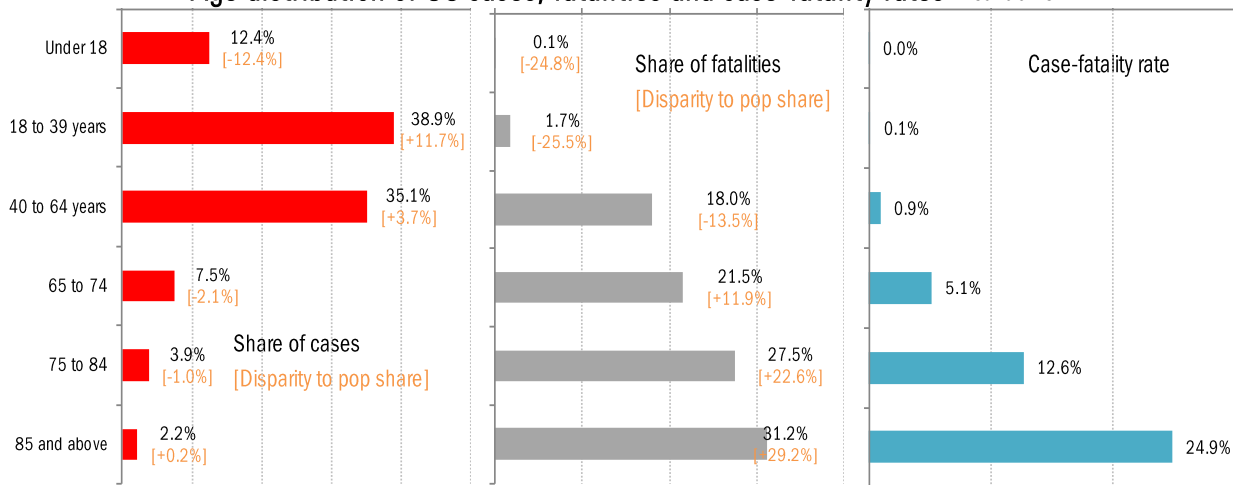
# US deep-dive

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

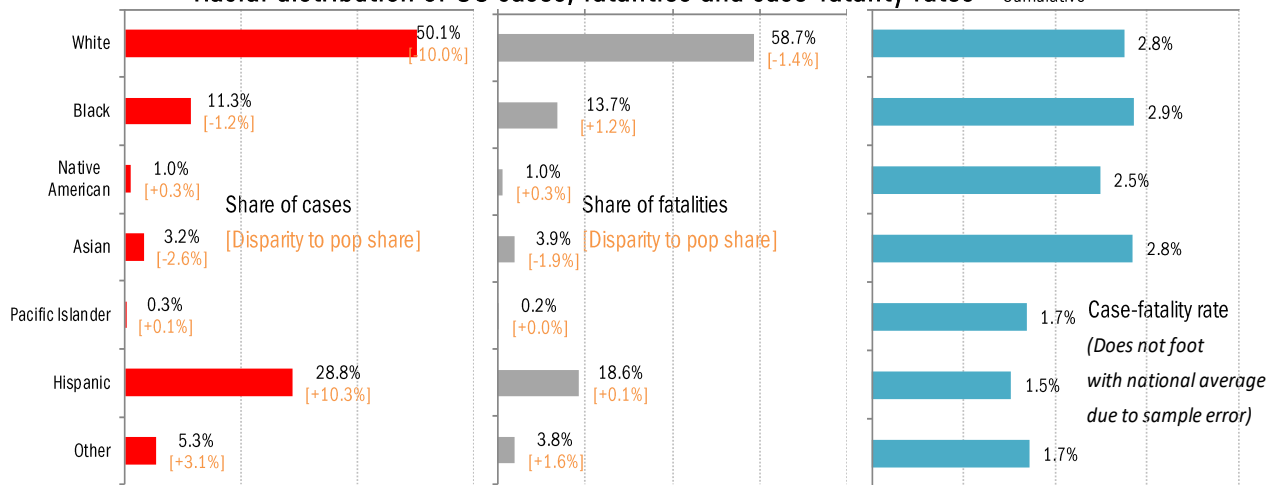


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations

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

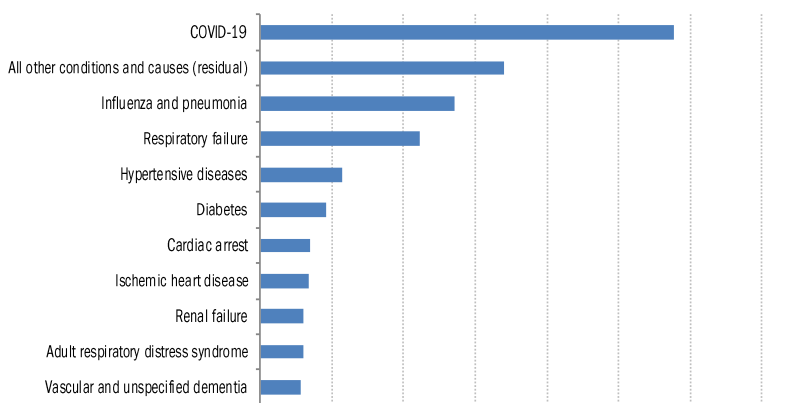


Racial distribution of US cases, fatalities and case-fatality rates



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

[A \\$2.4bn shot in the arm: financing COVAX](#)

*The Economist*

June 3, 2021

[The World Needs Answers on Covid's Origin](#)

*Wall Street Journal*

June 3, 2021

[Fauci's Boss Admits Funding Wuhan Lab: 'We Had No Control Over What They Were Doing.'](#)

Raheem Kassam

*National Pulse*

June 3, 2021

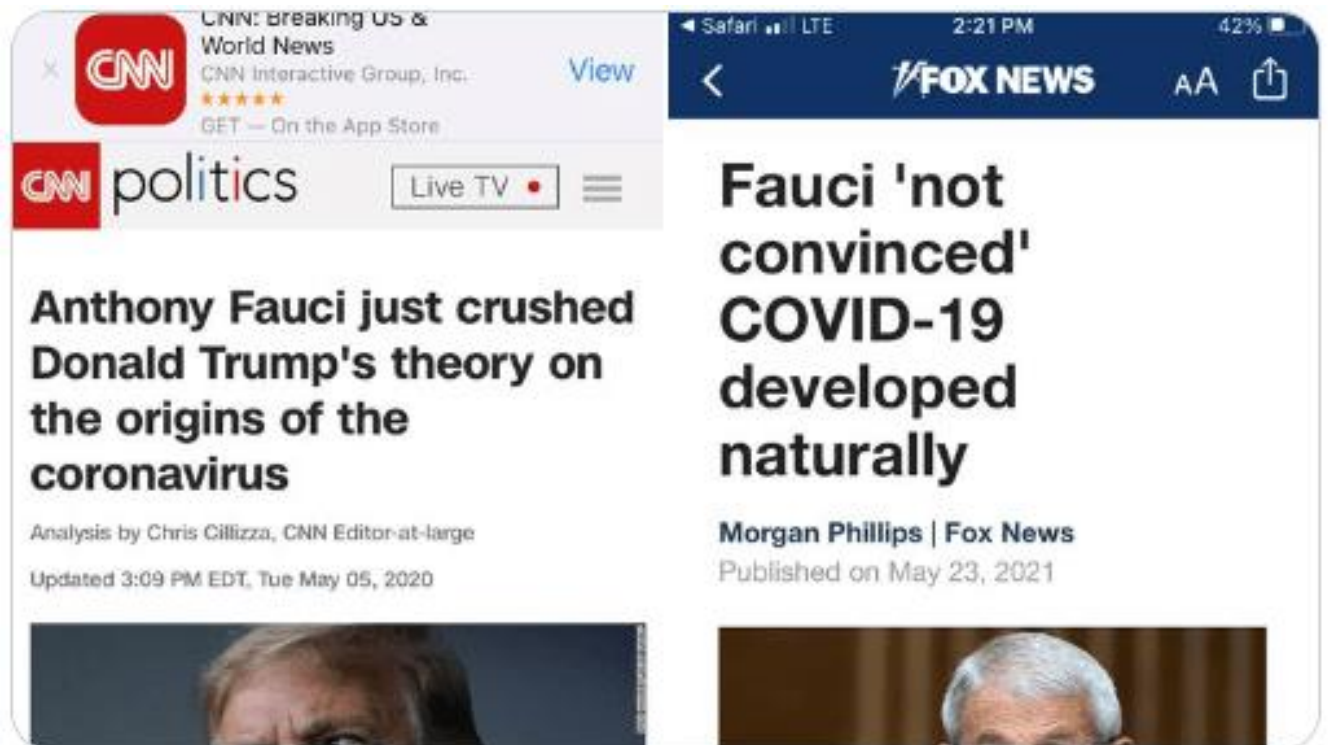
[Fauci Finished? WH Official 'Actively Discussing' Fauci's Exit Strategy](#)

Charlie Kirk

*Charlie Kirk*

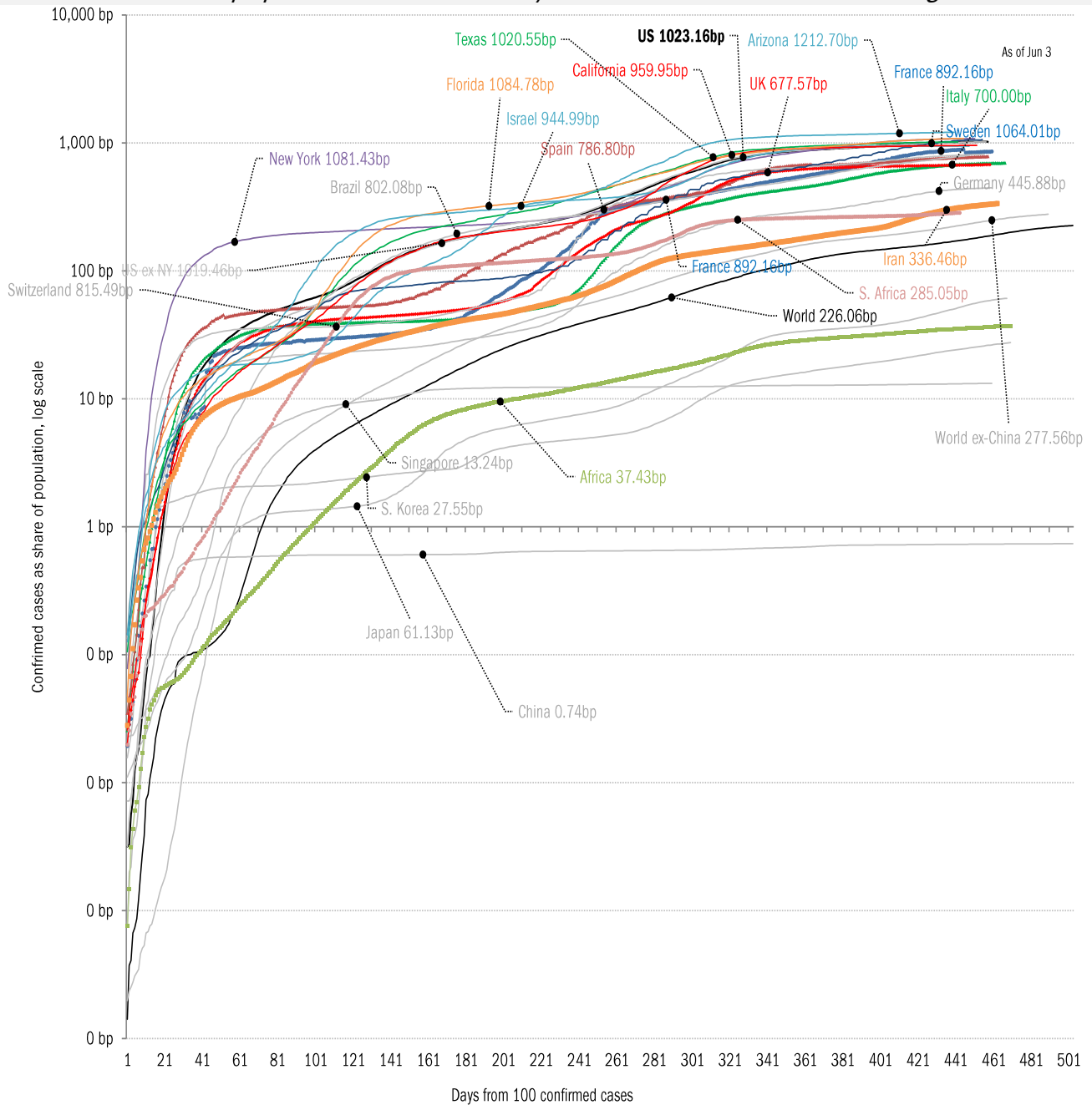
June 3, 2021

## Meme of the day



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

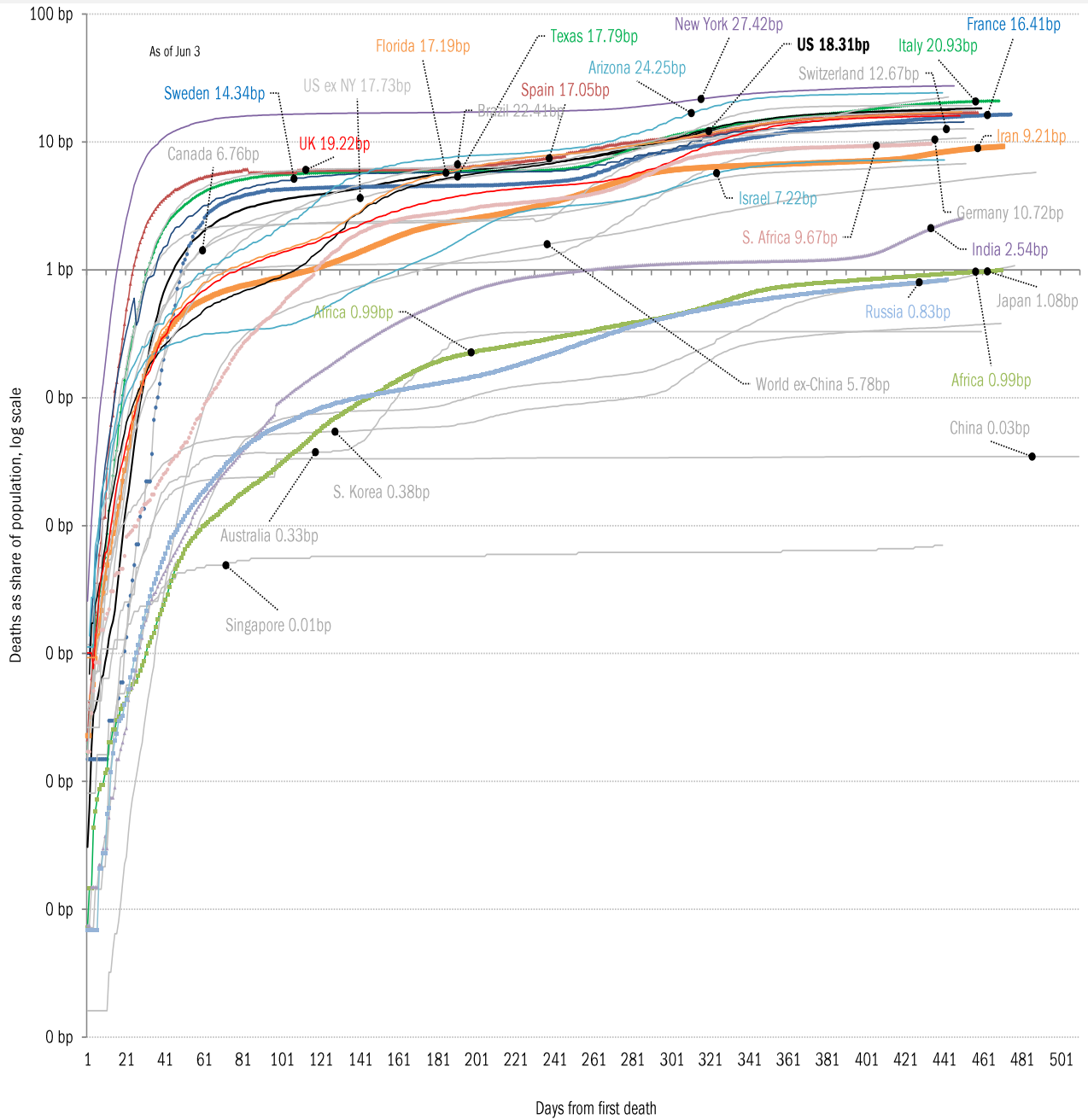
The coronavirus case accelerometer... tracking the world's infection curves  
*Share of infected population from first day with 100 confirmed cases, log scale*



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

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

## Share of deceased population from day of first fatality



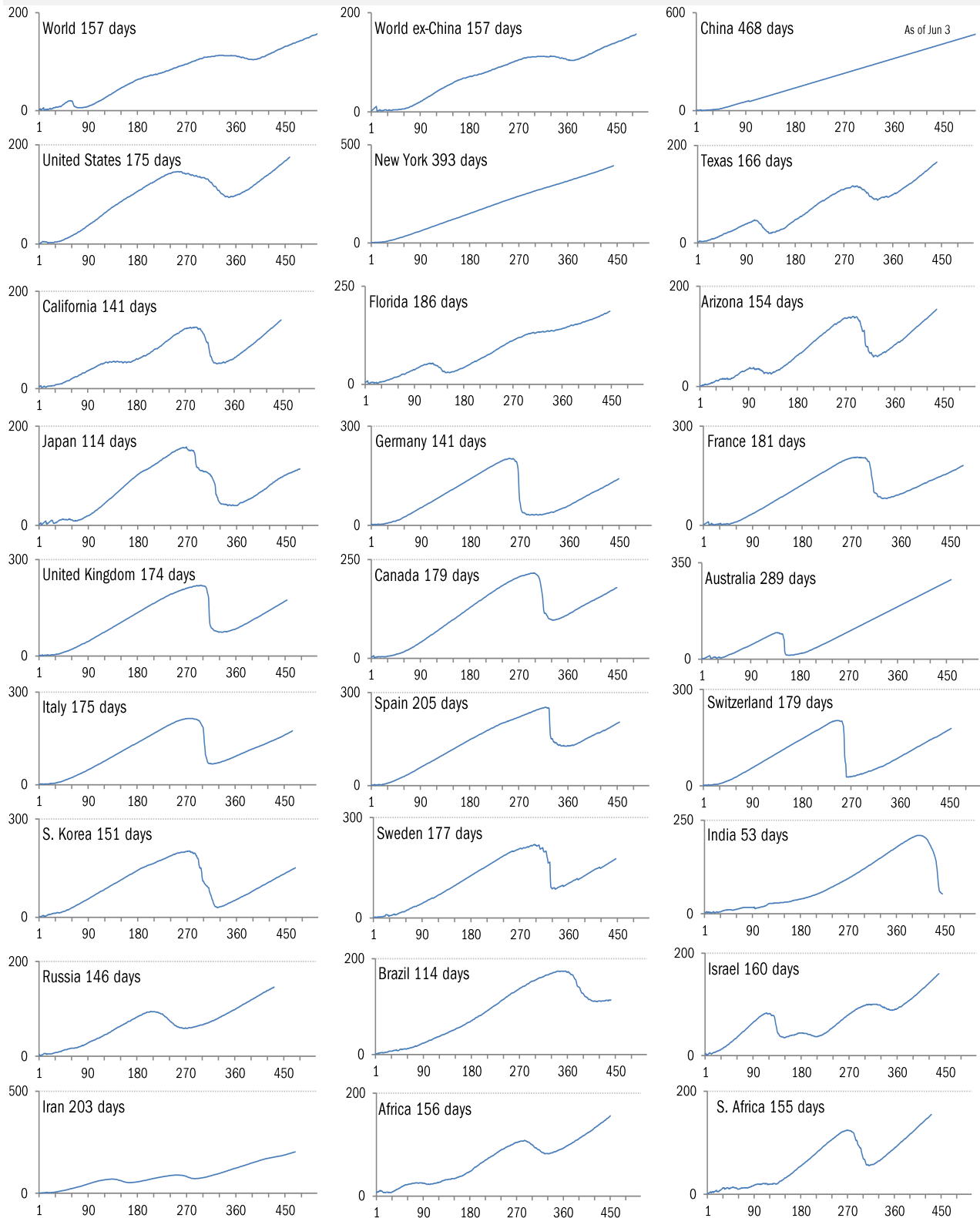
Source: [Johns Hopkins](#), TrendMacro calculations



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

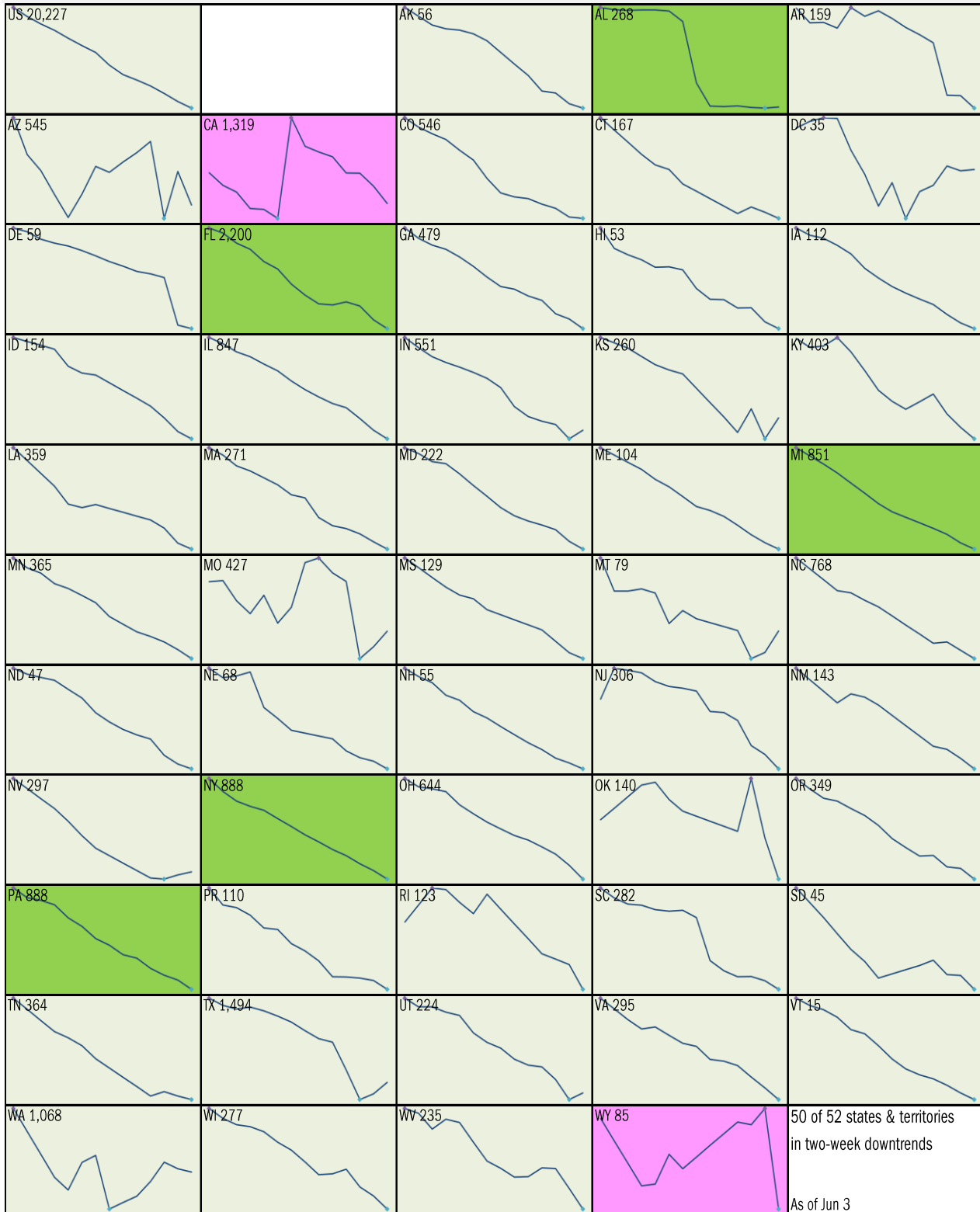
Vertical: days to double deaths Horizontal: days from first death

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



Source: [Johns Hopkins](https://www.jhu.edu/), 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

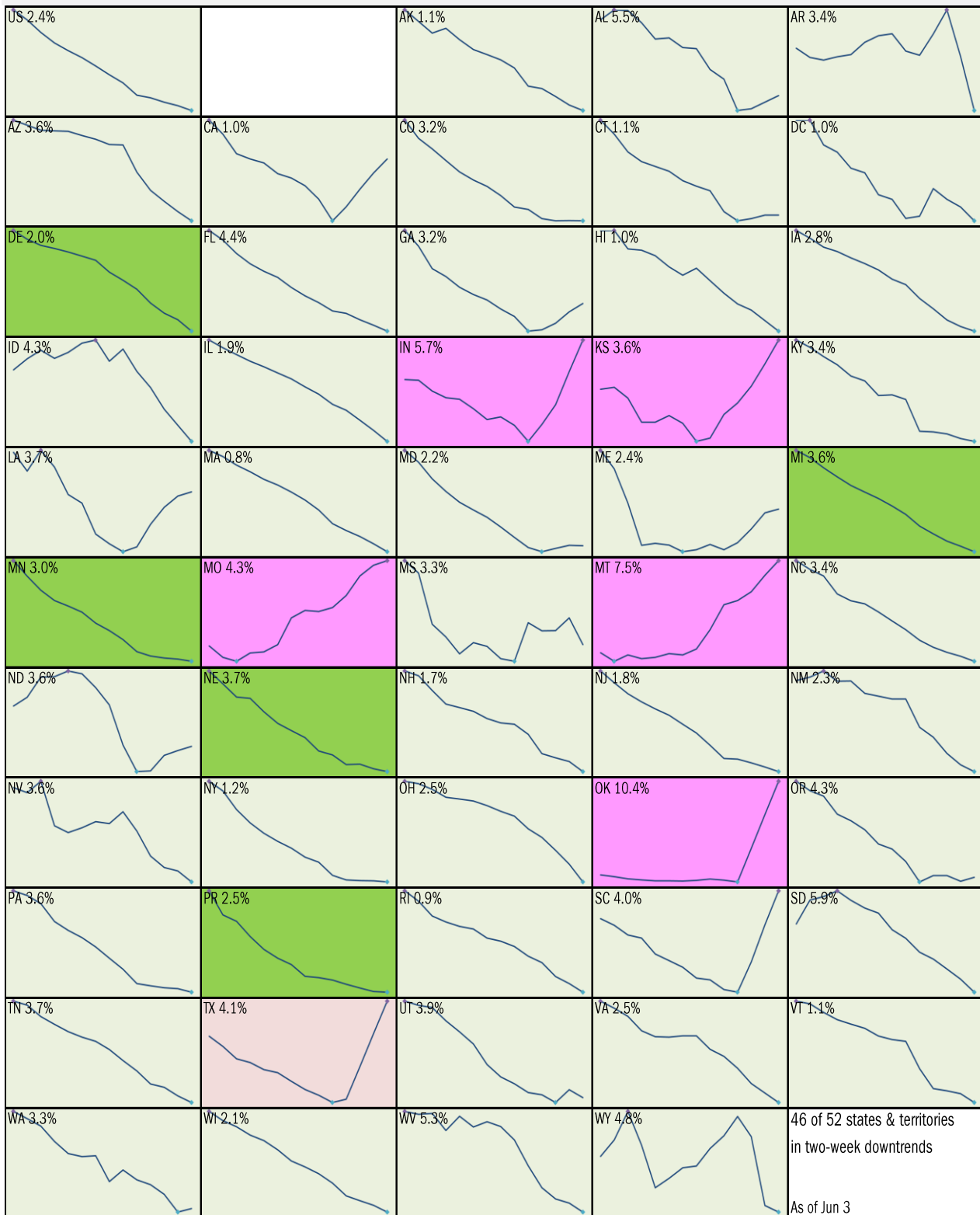


Source: [Johns Hopkins](#), TrendMacro calculations

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

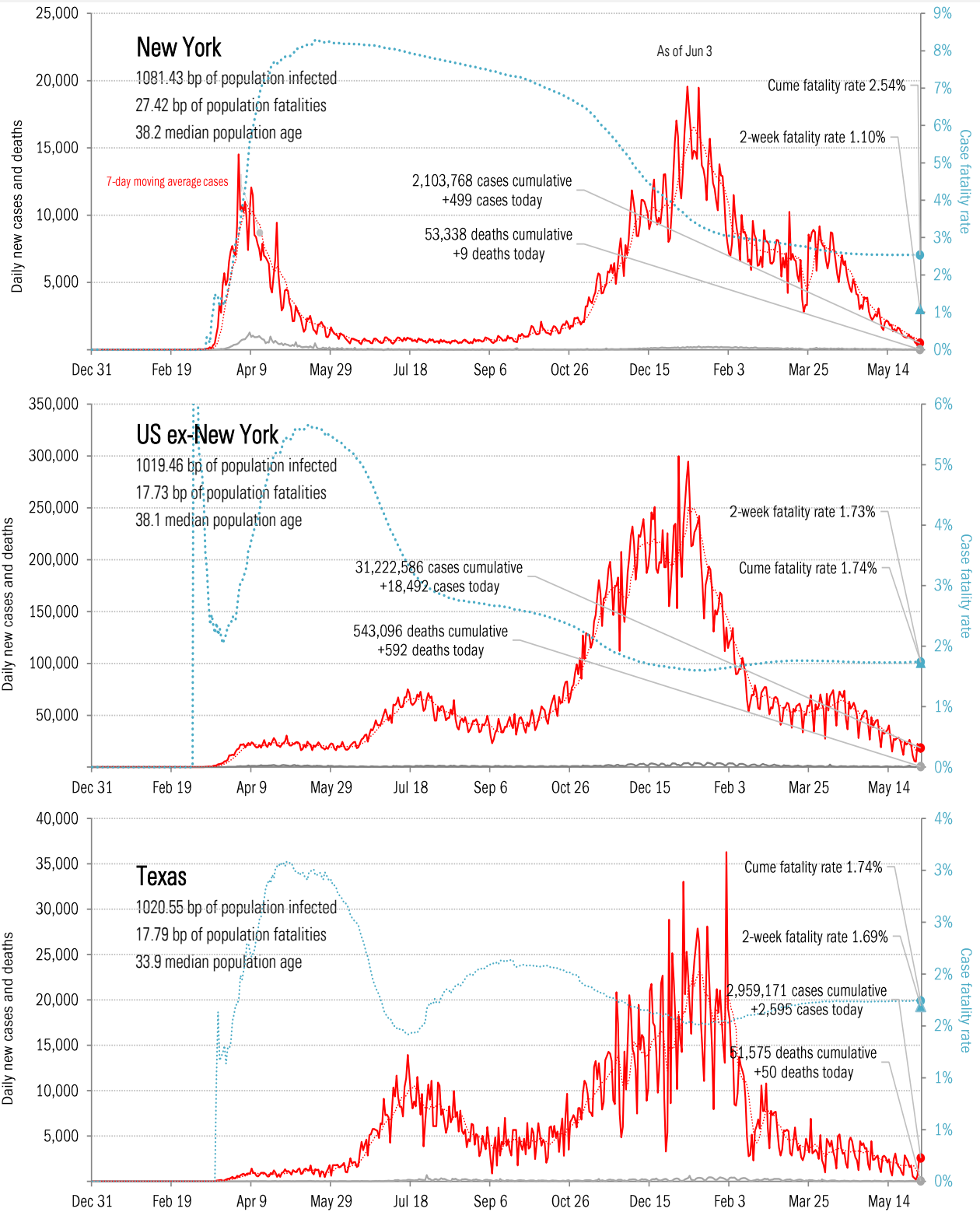
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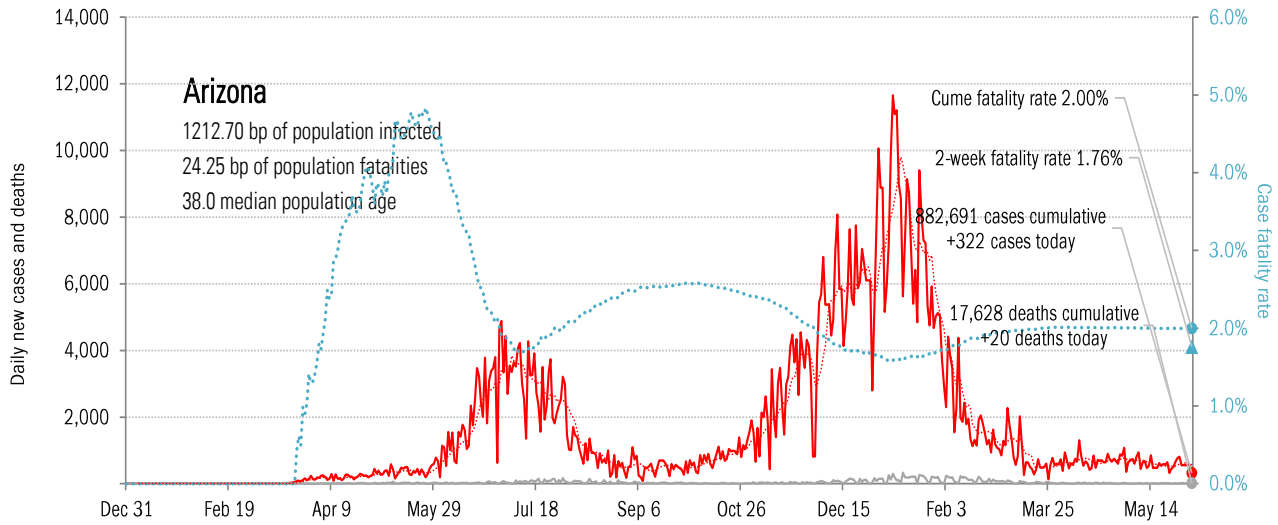
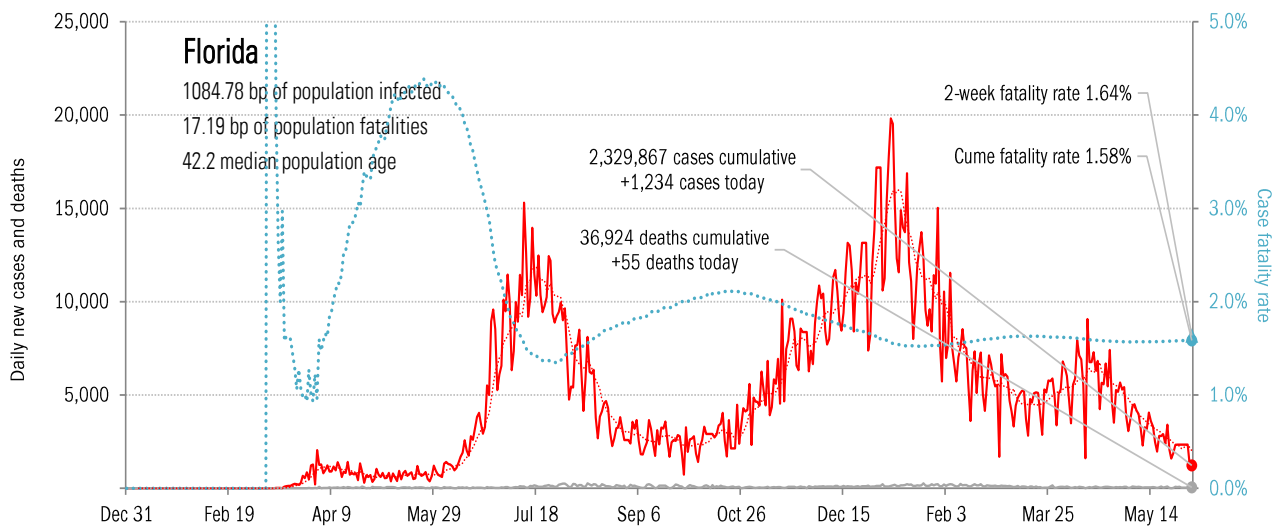
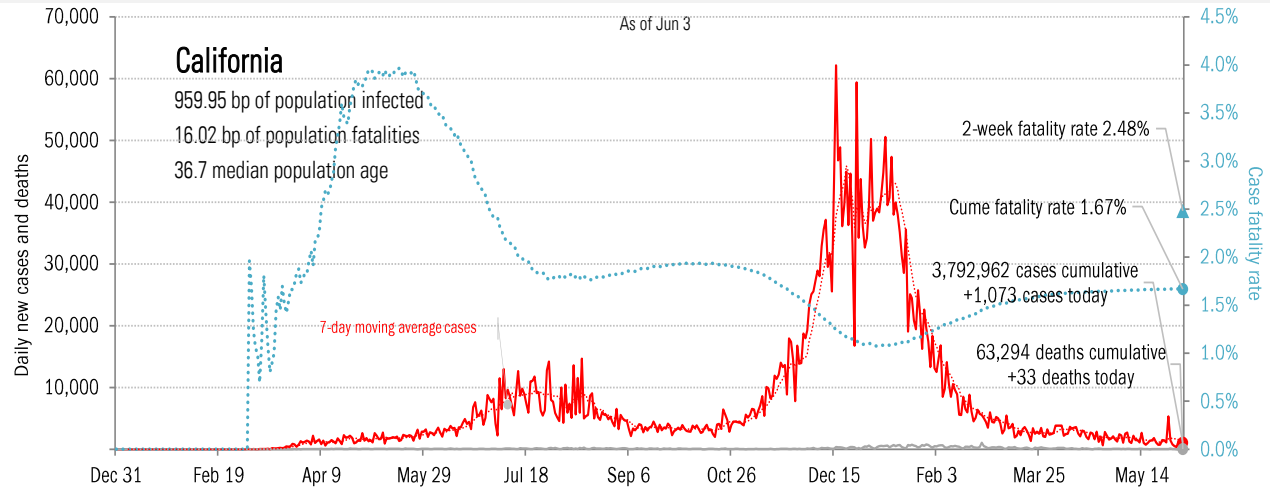
Source: [Covid Act Now](#), TrendMacro calculations

# From Ground Zero to the Rio Grande



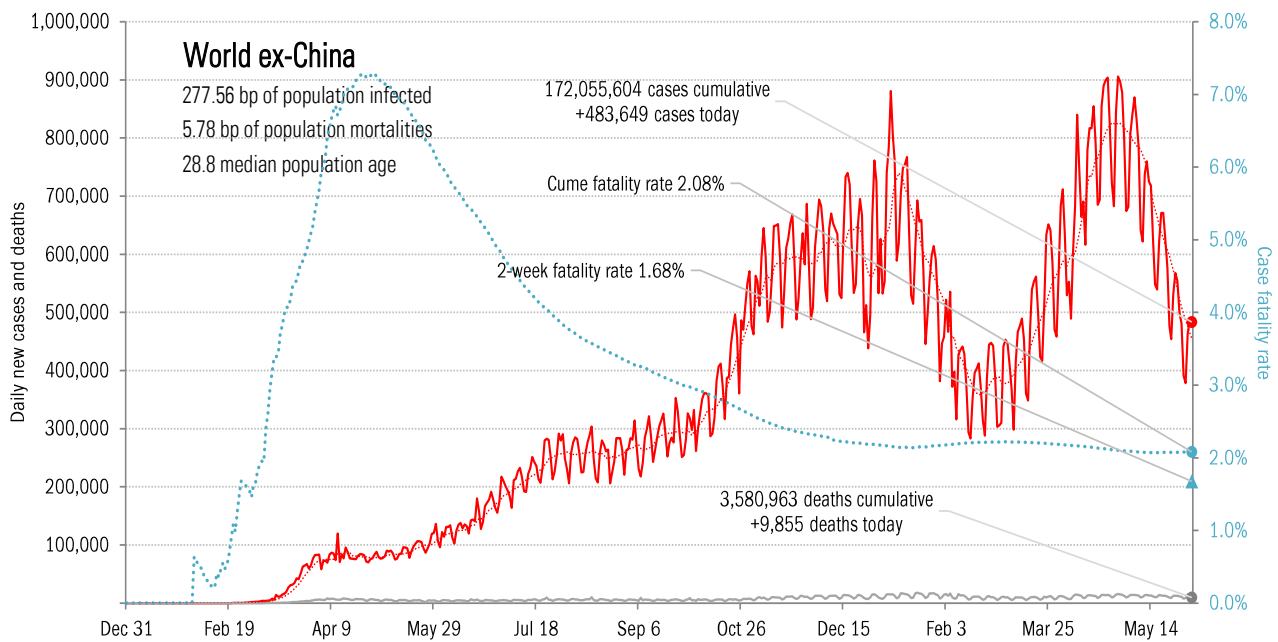
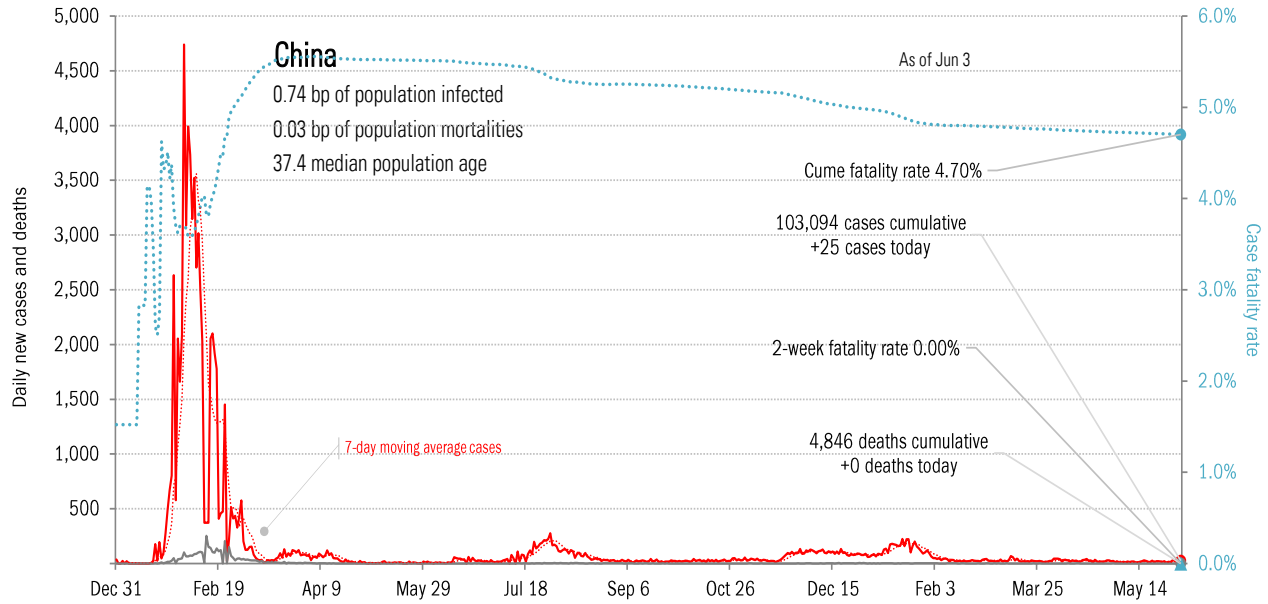
Source: [Johns Hopkins](#), TrendMacro calculations

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



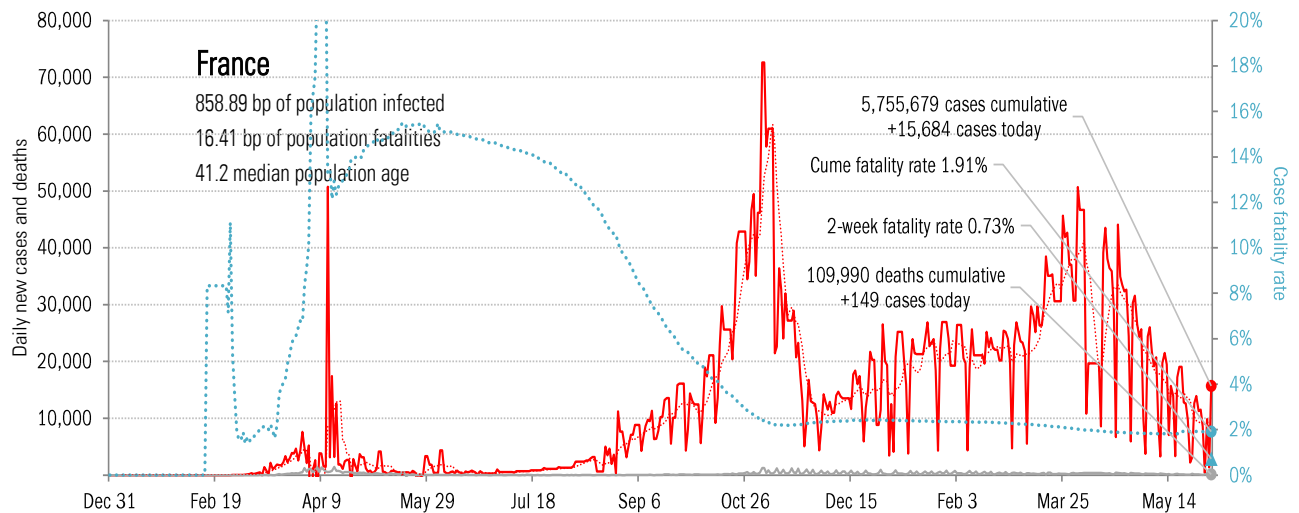
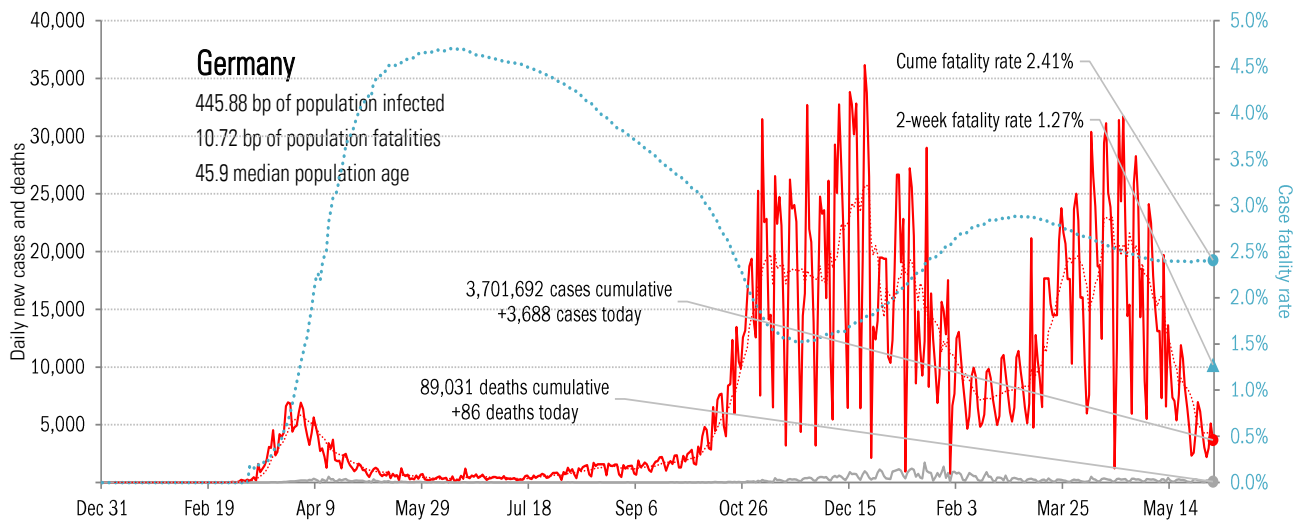
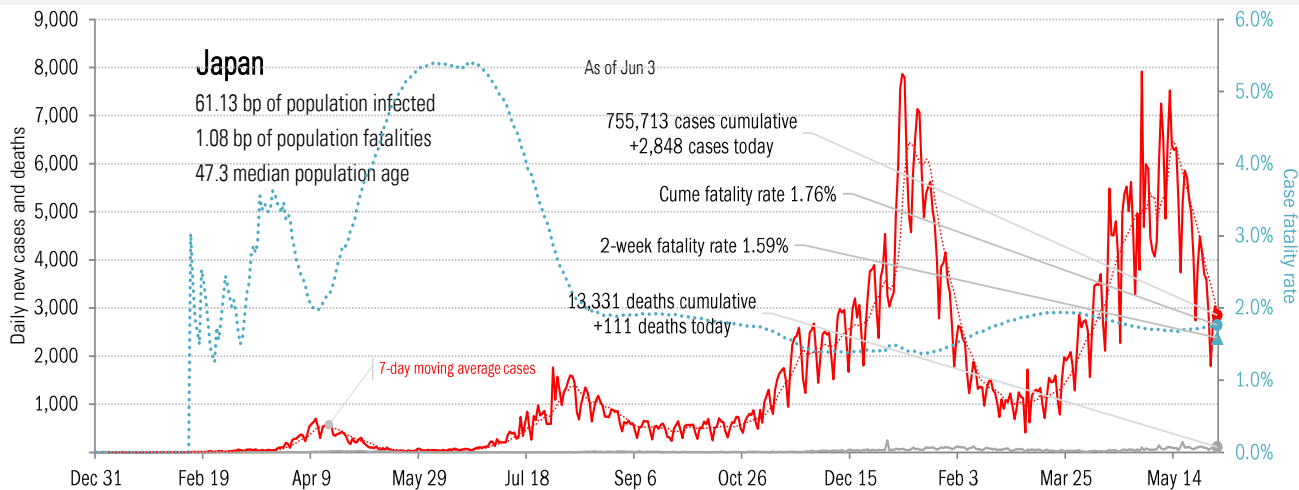
Source: [Johns Hopkins](#), TrendMacro calculations

# Patient zero... and then everyone else



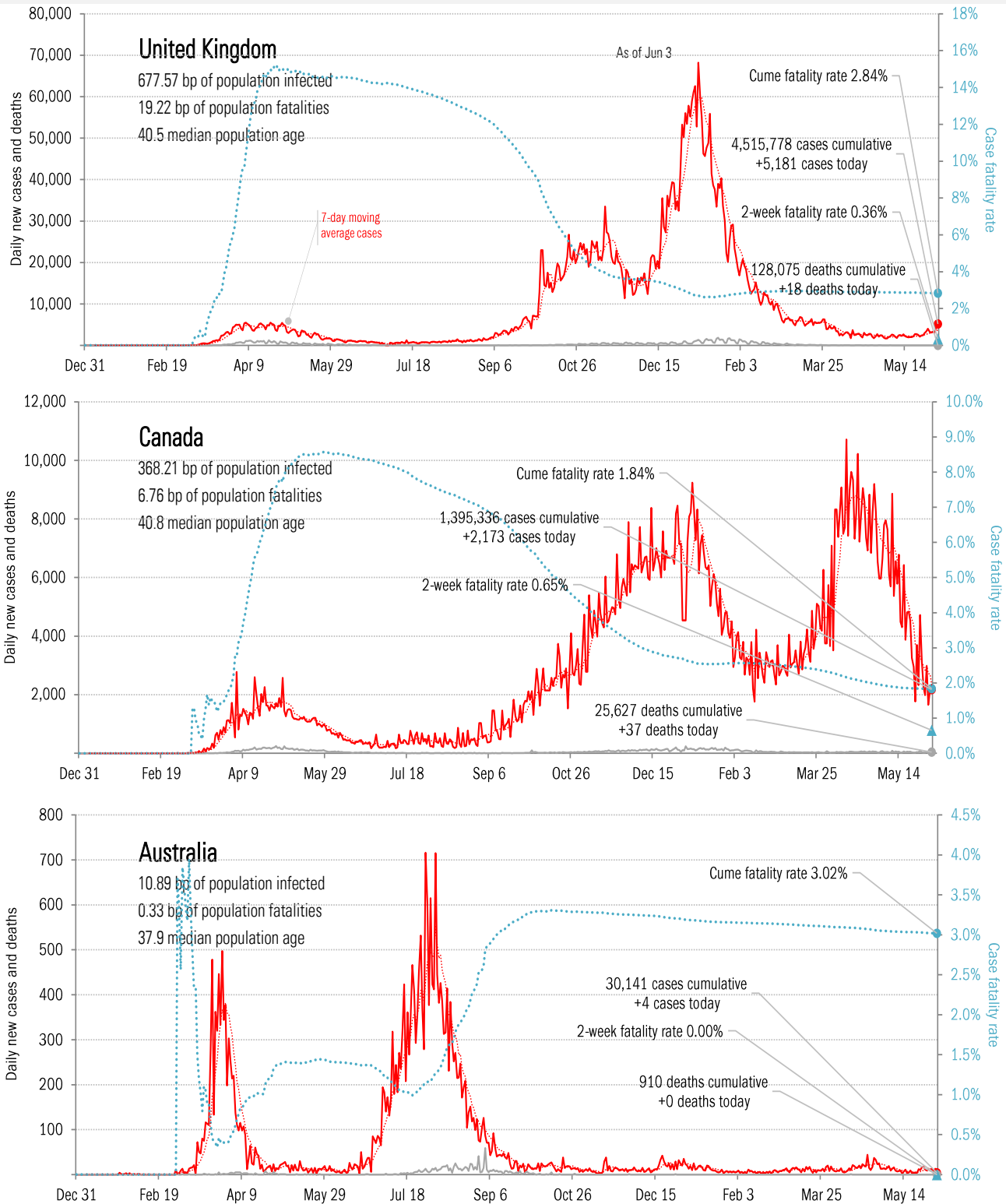
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the largest economies



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

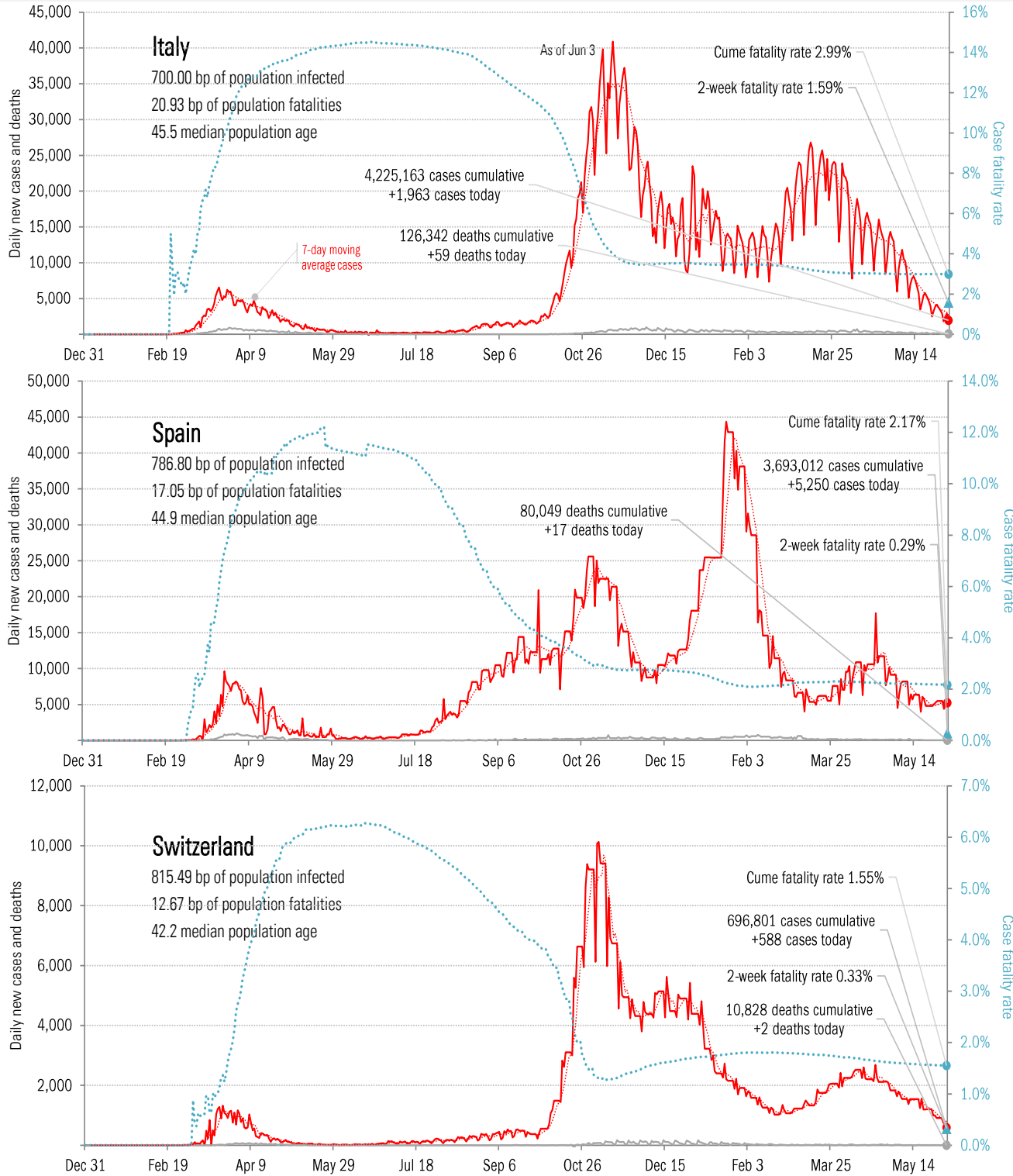
# Impact in The Anglosphere



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

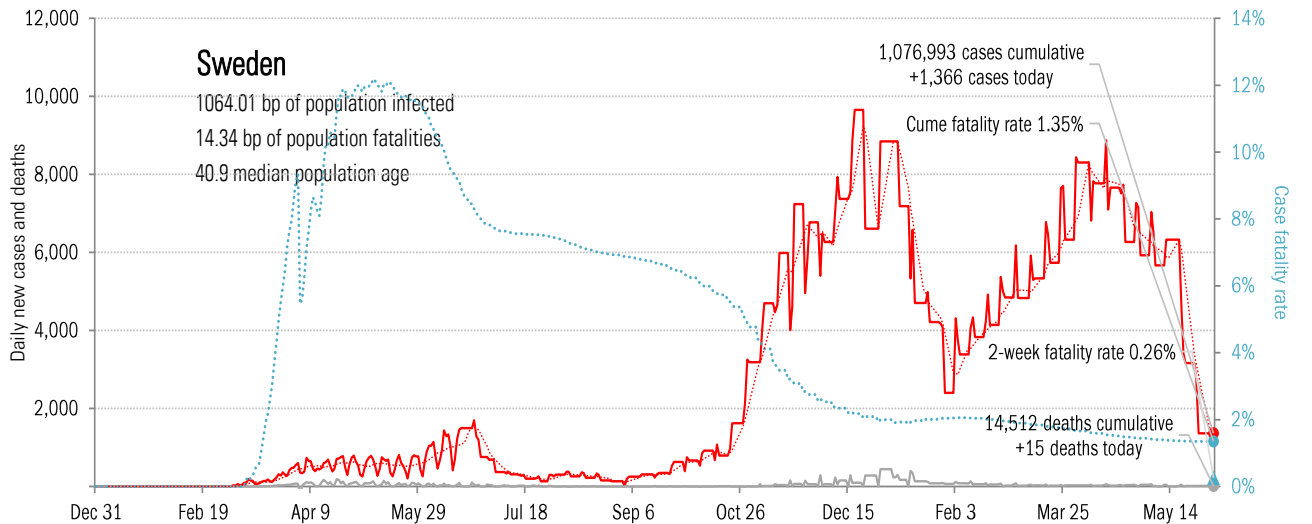
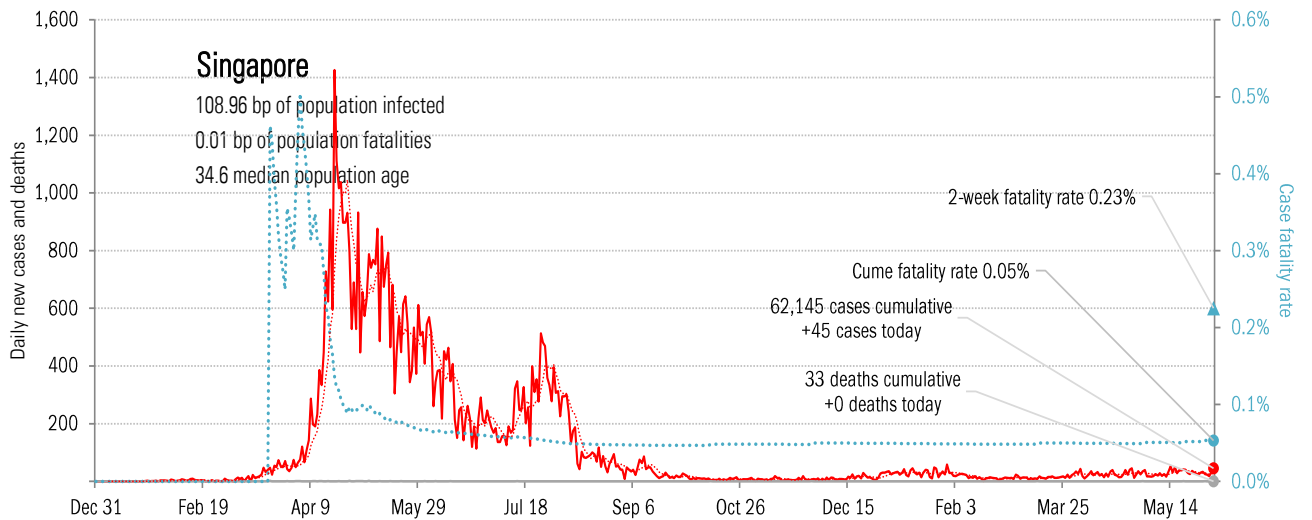
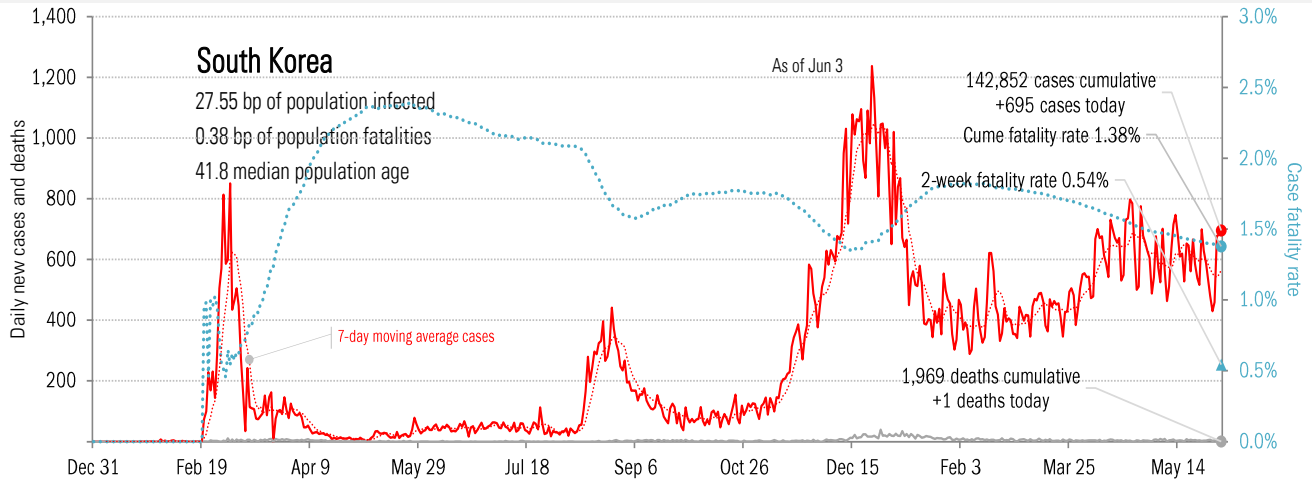


# Impact in continental Europe



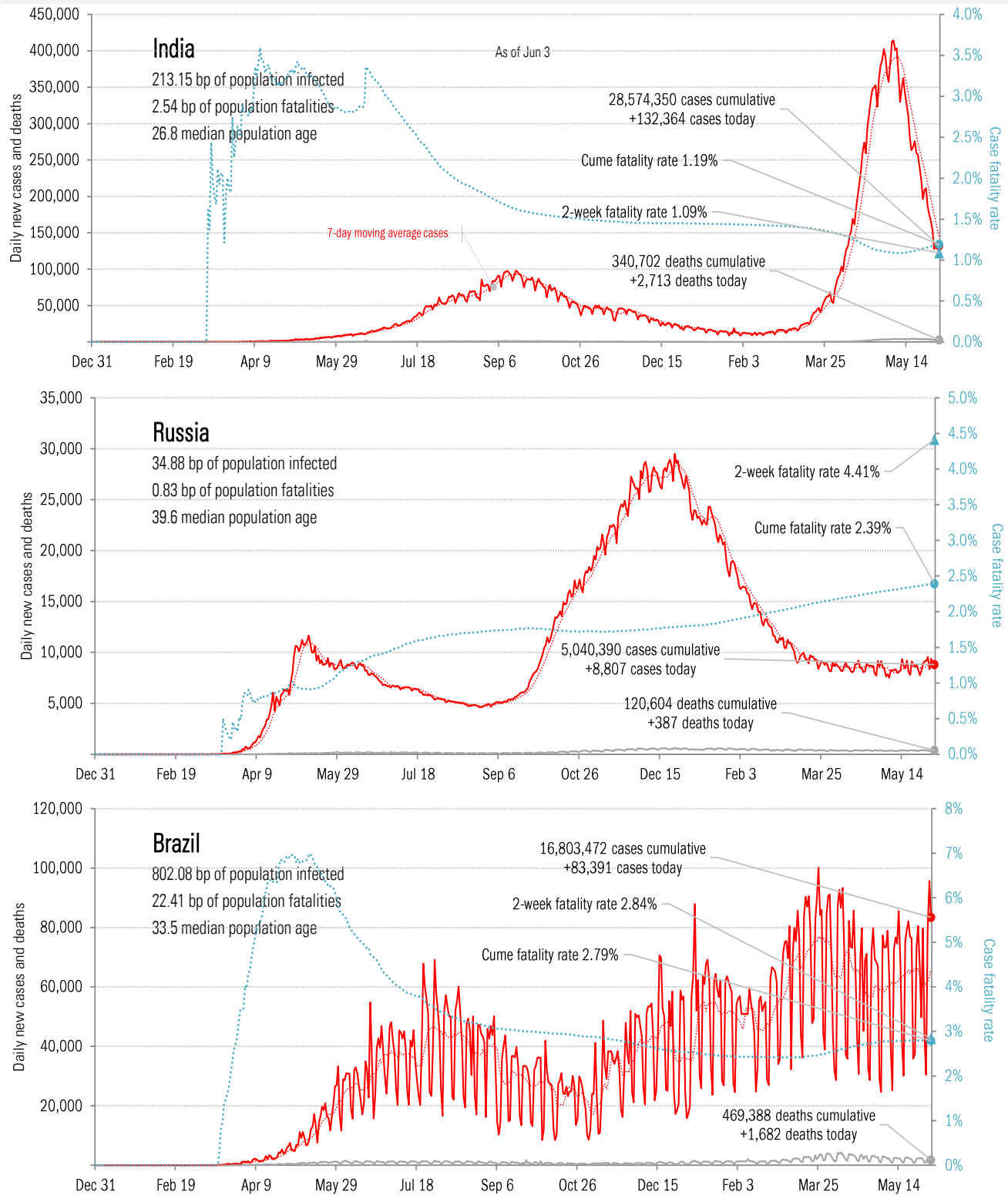
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in other hot-spots



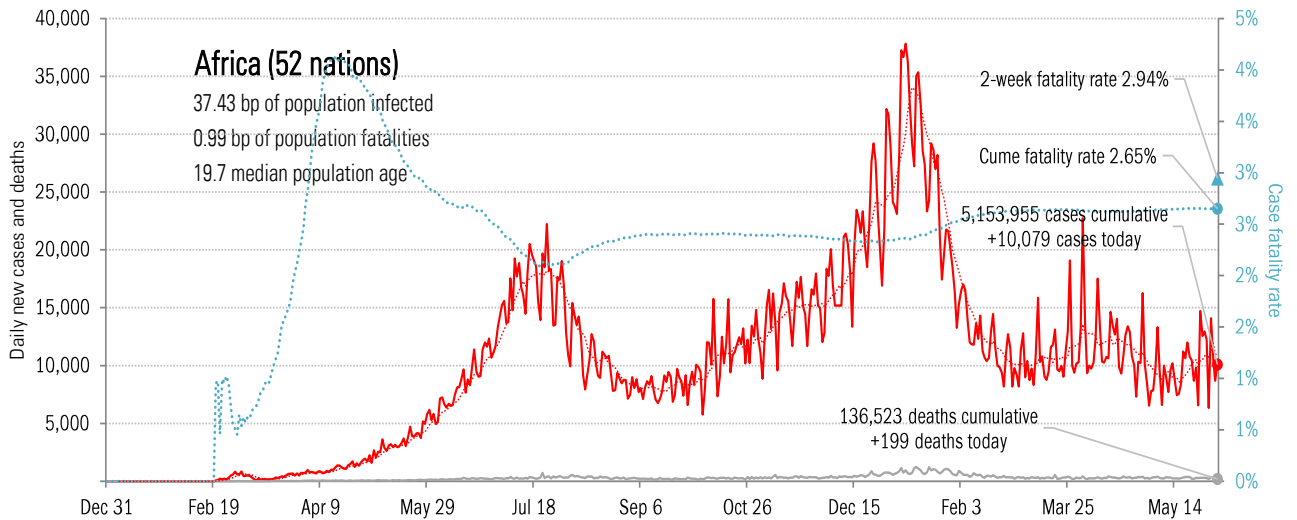
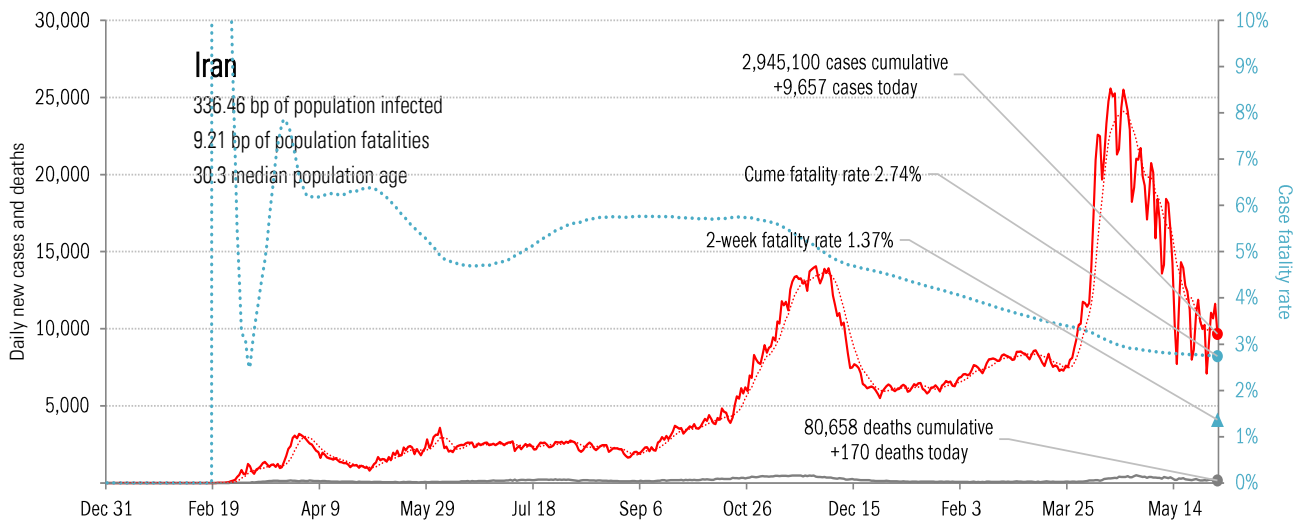
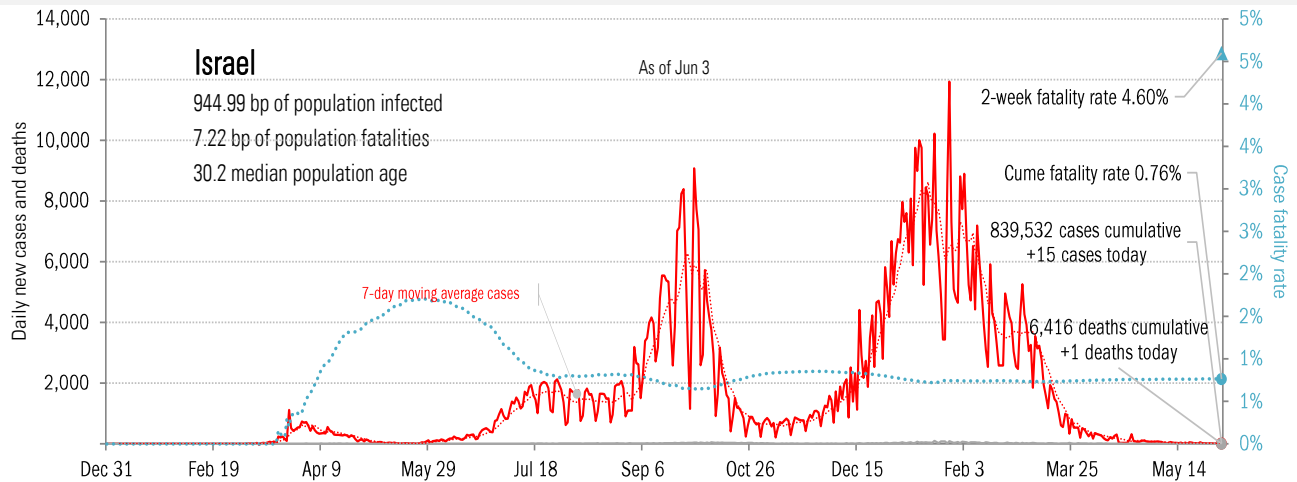
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the BRICs ex-China



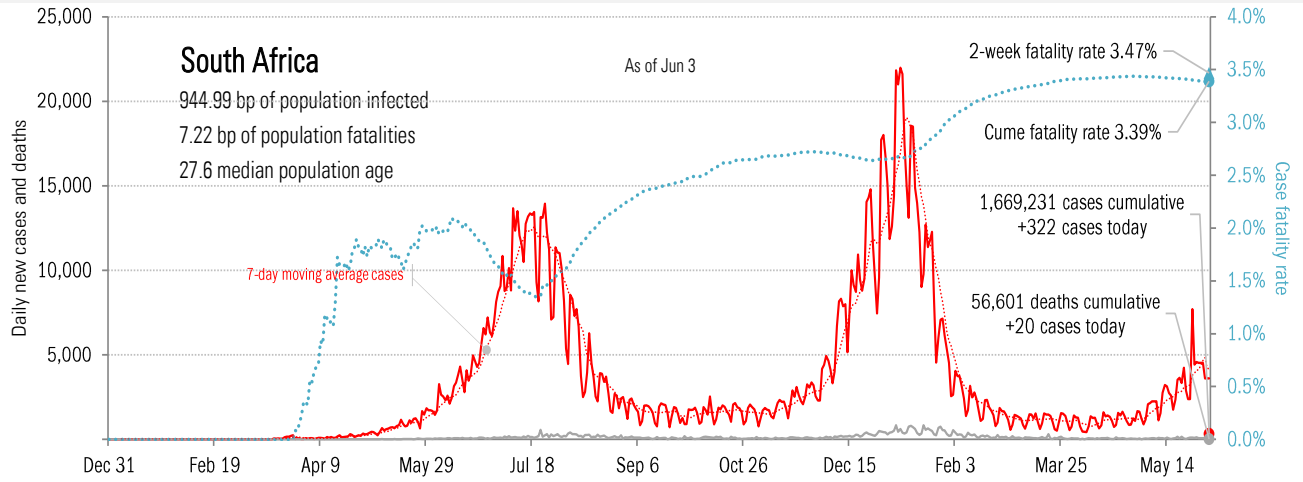
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the Middle East and Africa



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

# Impact in Africa, continued



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