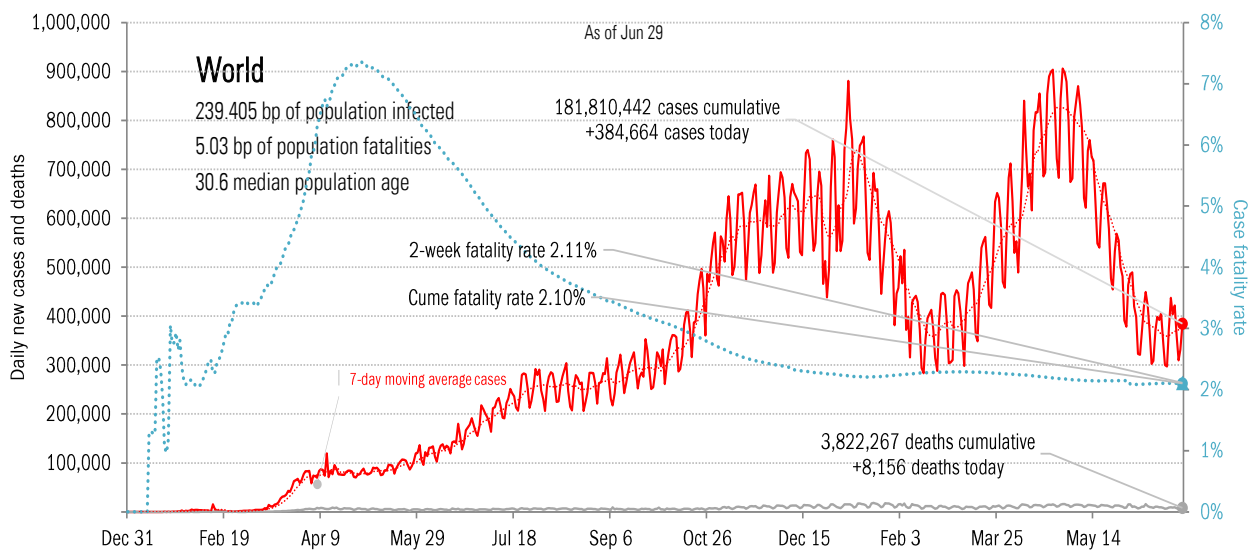
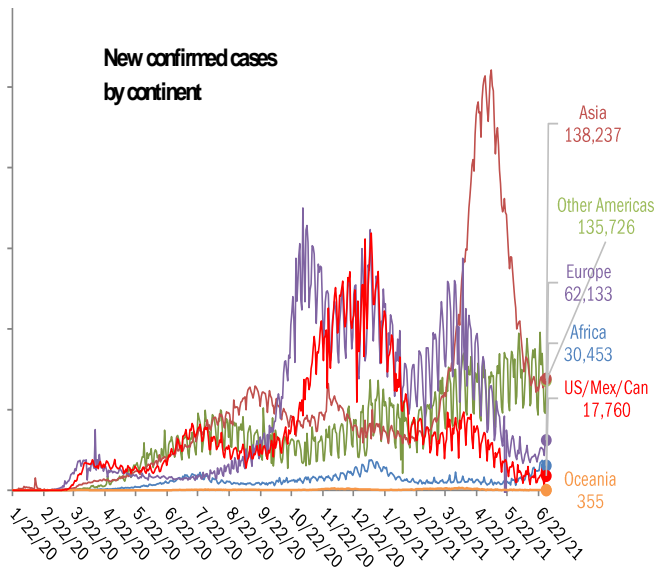


Data Insights: Covid-2019 Monitor

Wednesday, June 30, 2021

The global scorecard

The worst ten countries			
	New cases		New Deaths
	Brazil +64,903		Brazil +1,893
	India +45,951		India +817
	Colombia +25,880		Russia +643
	Argentina +24,065		Colombia +608
	Indonesia +20,467		Argentina +526
	United Kingdom +20,261		Indonesia +463
	Russia +20,217		United States +359
	South Africa +13,347		Romania +294
	Iran +12,717		South Africa +226
	United States +11,596		Mexico +195
	+259,404		+6,024
	World +384,664		World +8,156
	Top ten 67%		Top ten 74%



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

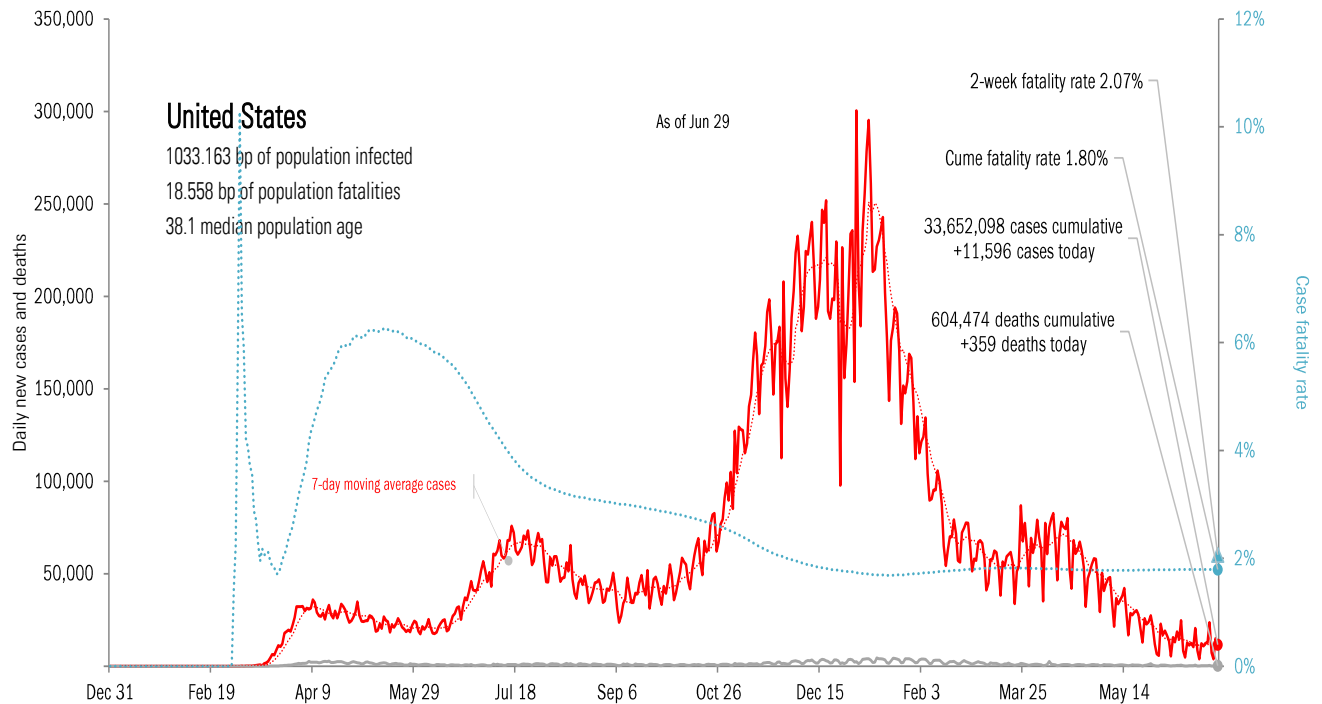
The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
TX	+2,095		MO	+41		NV	+30		CA	3,818,303		CA	63,621		TX	253,743		RI	91%	MO	16%
FL	+1,578		FL	+34		TX	+27		TX	2,997,318		NY	53,676		CA	239,951		MA	84%	AR	12%
MO	+933		MI	+32		FL	+18		FL	2,366,243		TX	52,308		FL	186,675		MO	83%	UT	11%
CA	+931		TX	+29		CA	+16		NY	2,114,686		FL	37,865		NY	136,394		PA	82%	WA	10%
NV	+625		CH	+28		PA	+16		IL	1,391,480		PA	27,670		GA	109,083		MD	81%	CO	10%
AZ	+546		CA	+23		NY	+10		PA	1,216,430		NJ	26,444	#N/A	0	MN	80%	WY	9%		
GA	+502		GA	+19		OK	+10		GA	1,133,983		IL	25,656		CH	179,373		MI	79%	NV	9%
AR	+479		AZ	+17		AZ	+8		CH	1,111,124		GA	21,412		IL	82,478		FL	78%	MT	9%
LA	+413		WI	+17		TN	+8		NJ	1,023,200		MI	20,996		KY	77,899		CT	78%	TX	9%
UT	+361		PA	+13		AL	+5		NC	1,013,481		CH	20,309		MI	73,092		GA	77%	ID	7%
+8,463			+253			+148			18,186,248			349,957			1,338,688			All states 70%		67%	
All states +13,174			+393			+65			All states 33,652,098			604,474			2,384,382			All states 70%		67%	
Top ten 64%			64%			228%			Top ten 54%			58%			56%			Median 73%		4%	

Some states not reporting

Five most improved US states

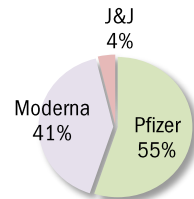
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
CA	-690	FL	-25	AR	-25	GA	+100 bp
NC	-590	IL	-16	GA	-18	UT	+50 bp
LA	-529	IN	-6	KS	-18	MP	+40 bp
AL	-517	MN	-5	MO	-18	MS	+40 bp
OK	-495	NC	-4	MI	-12	FR	+40 bp



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	394,431,775				+0.551 million	US	46.1%	53.8%
Doses administered	334,748,185				+0.779 million	UK	48.2%	65.7%
Administered	One dose	% Pop	Immune	% pop	New immune today	France	29.7%	49.6%
Total population	184,596,467	55%	158,347,604	47%	+0.433 million	Spain	36.6%	53.5%
Age 12 to 17	8,716,814	34%	6,458,909	26%	+0.083 million	Germany	36.2%	54.1%
Age 18 to 64	126,088,753	62%	107,694,279	53%	+0.307 million	Italy	30.5%	55.9%
Age 65 and over	49,578,495	91%	44,076,906	81%	+0.041 million	Australia	5.8%	23.6%
						Israel	59.7%	64.5%
						Canada	29.4%	68.0%
						Japan	11.5%	22.9%
						Africa	1.2%	2.6%
						India	4.2%	19.6%
						Brazil	12.3%	34.2%



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 **190 days** by Jan 4, 2022
 58.8% of population >18 immunized
 11.5% previously tested positive
70.2% vs 60% adult herd immunity*

Global data differs from sources, timing

AK
60.8%
48.8%
42.8%

ME
72.7%
66.2%
60.9%

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As of Jun 29

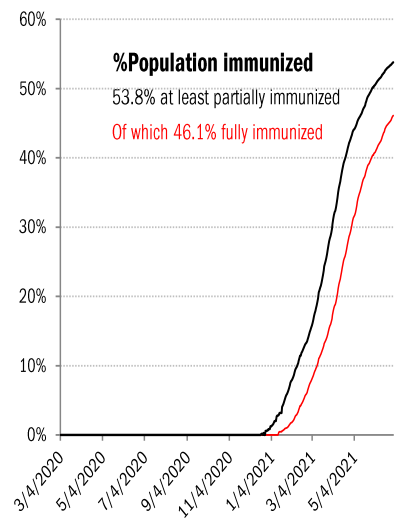
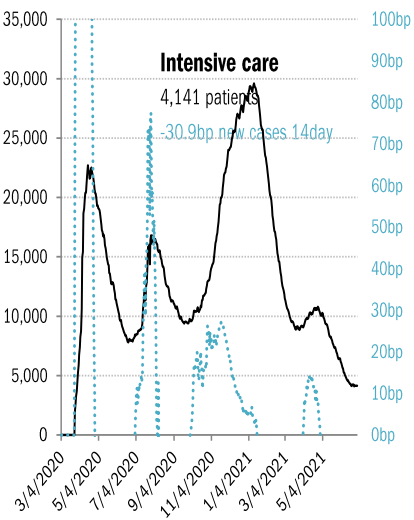
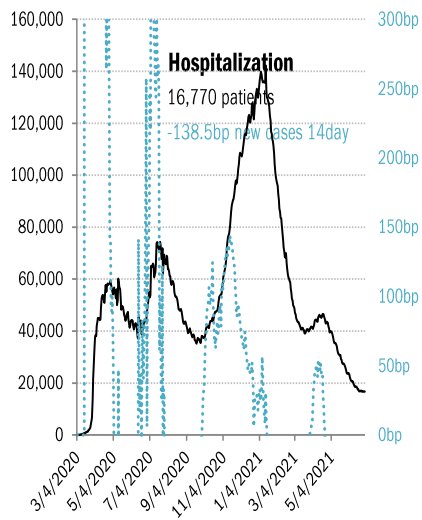
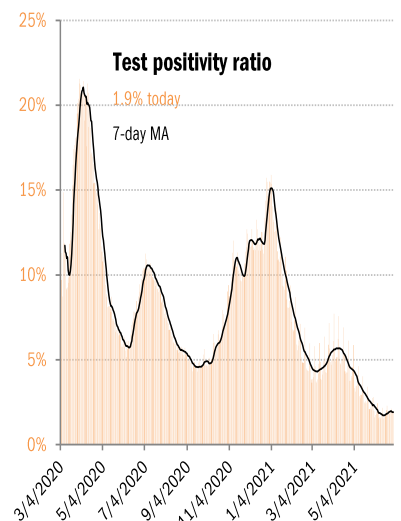
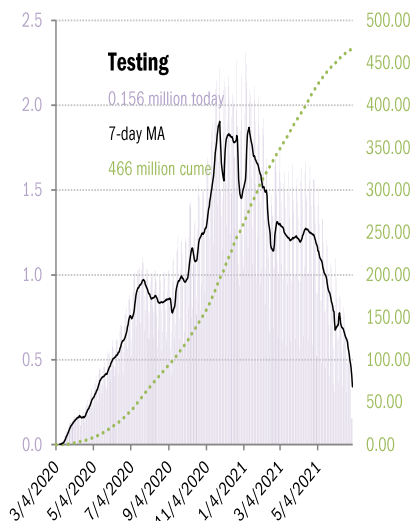
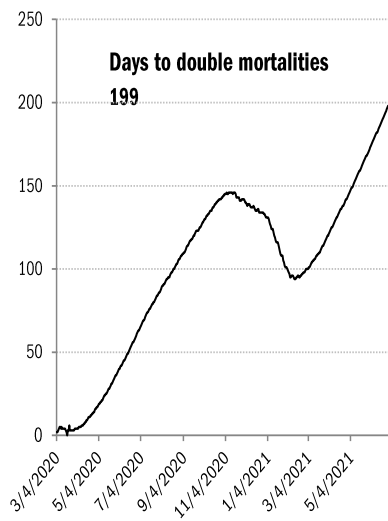
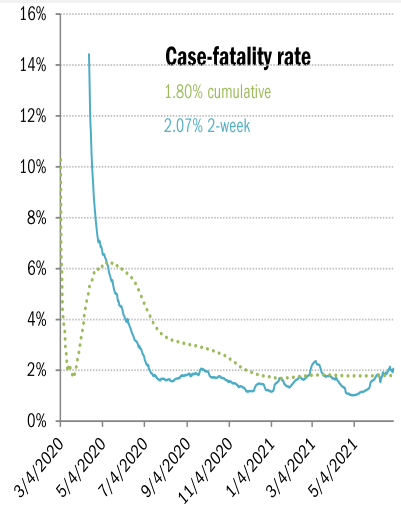
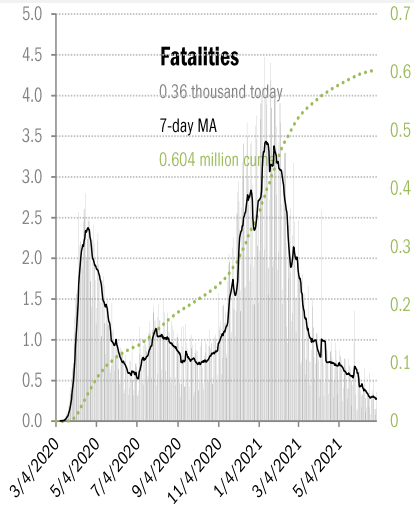
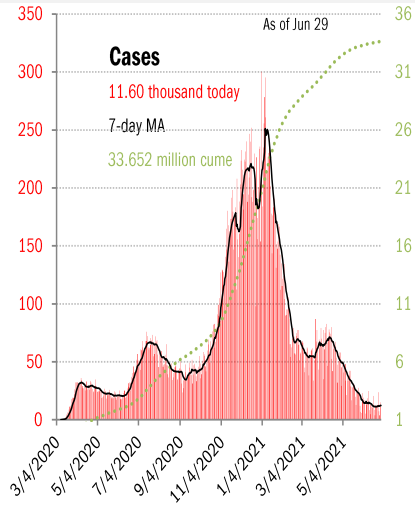
* Includes persons >18 fully immunized or previously tested positive, no overlap. Disregards untested positives, natural immunities.

** 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

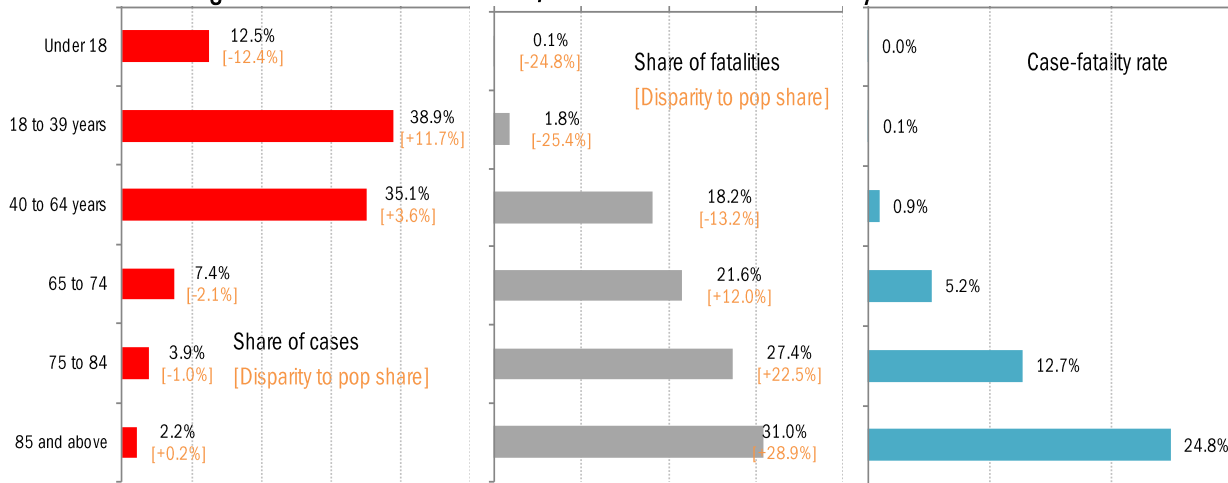
US deep-dive

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

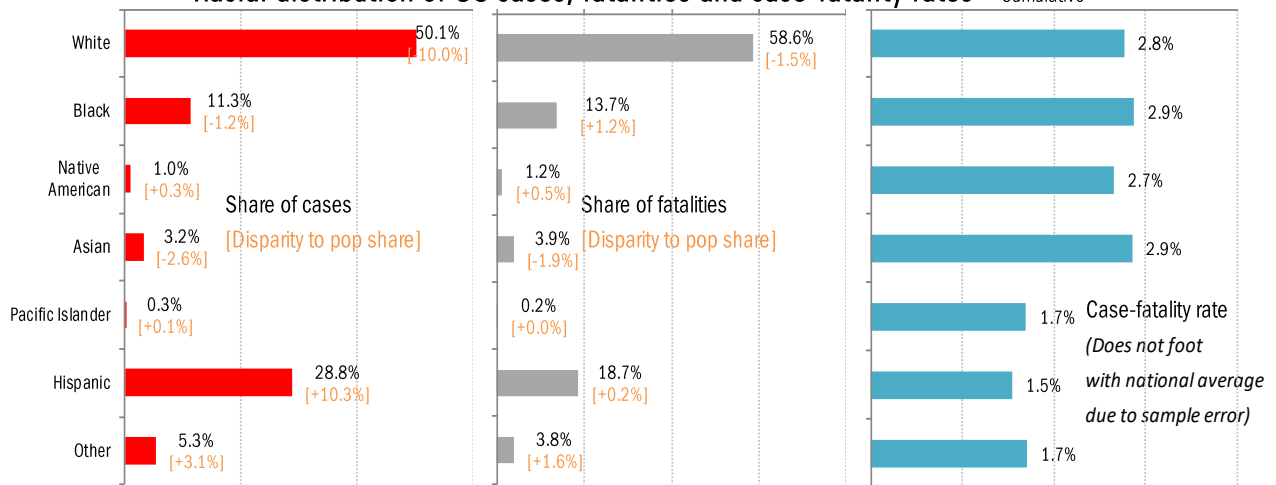


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations

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

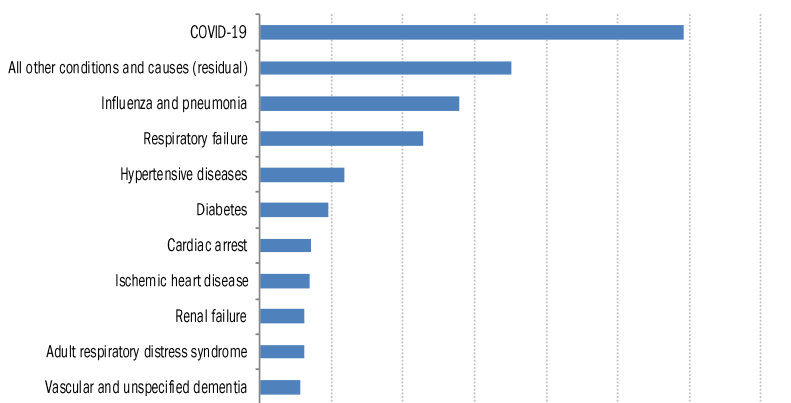


Racial distribution of US cases, fatalities and case-fatality rates



Comorbidities

Top-ten joint causes of Covid mortalities, cumulative



As of Jun 20

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

[Pfizer and Moderna Vaccines Likely to Produce Lasting Immunity, Study Finds](#)

Apoorva Mandavilli
New York Times
June 30, 2021

[Indonesian Province Orders Lockdowns as Virus Spike Worsens](#)

Arys Aditya
Bloomberg
June 28, 2021

[WHO causes confusion by urging fully vaccinated people to wear masks](#)

Jackie Salo
New York Post
June 28, 2021

[Half of Australia's Population in Lockdown as Delta Spreads](#)

Matthew Burgess and Georgina McKay
Bloomberg
June 28, 2021

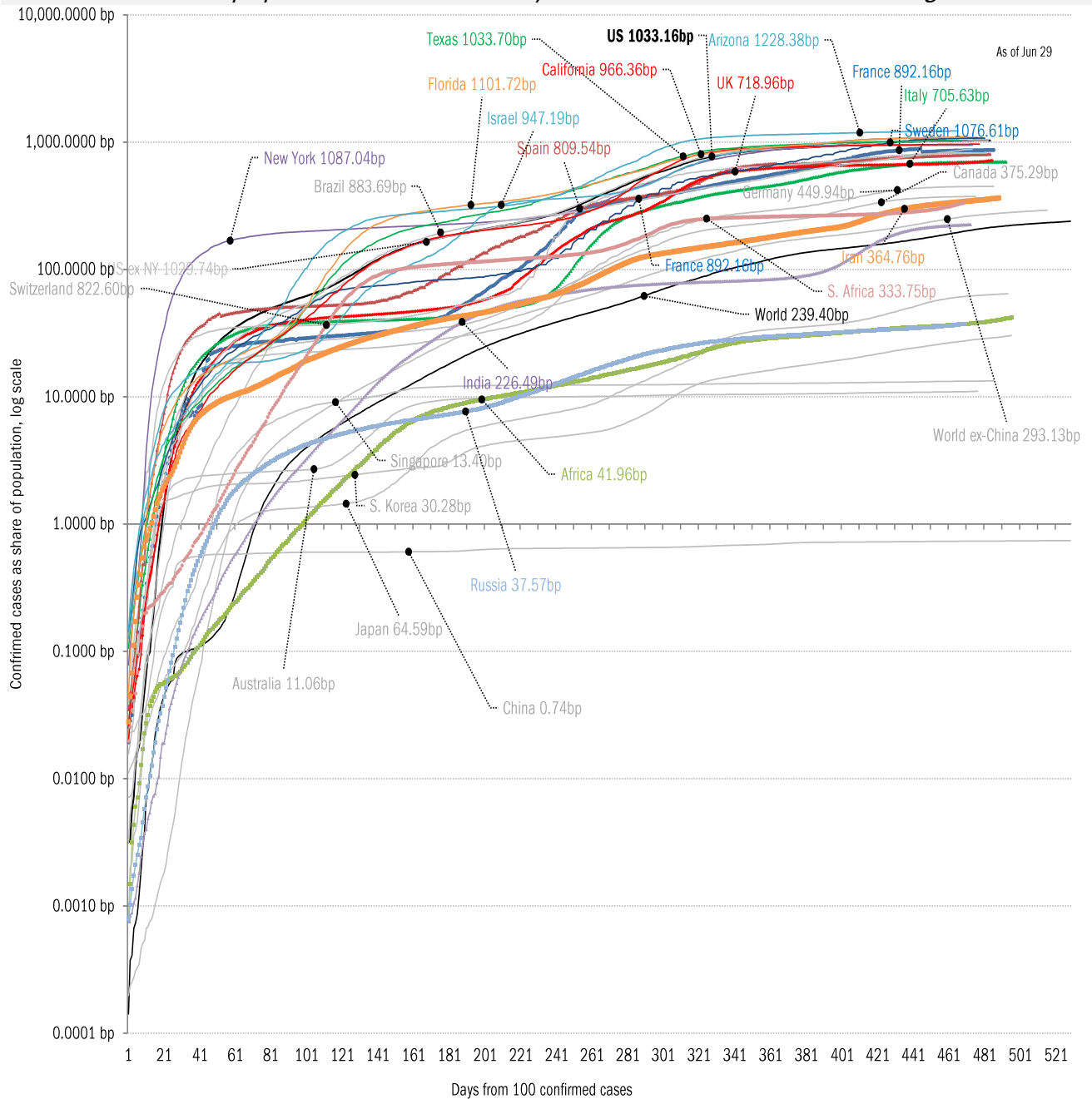
Meme of the day



You can sweat on each other for 48 minutes, breathe in each others face, and all handle the same ball, but you better wear a mask on the bench, and can't meet the opposing team at half court after the game to shake hands. Science.

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

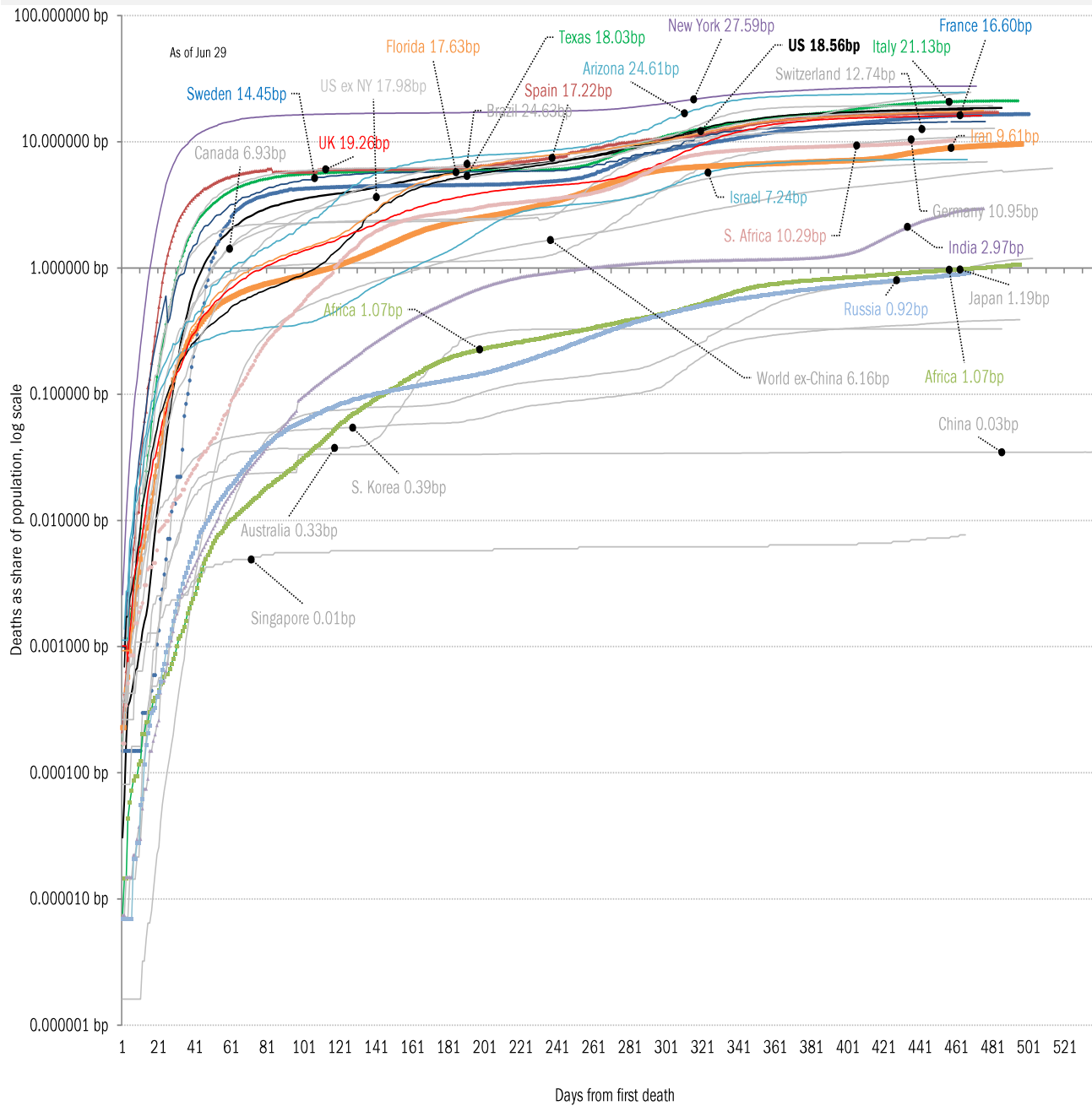
The coronavirus case accelerometer... tracking the world's infection curves
Share of infected population from first day with 100 confirmed cases, log scale



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

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

Share of deceased population from day of first fatality, log scale

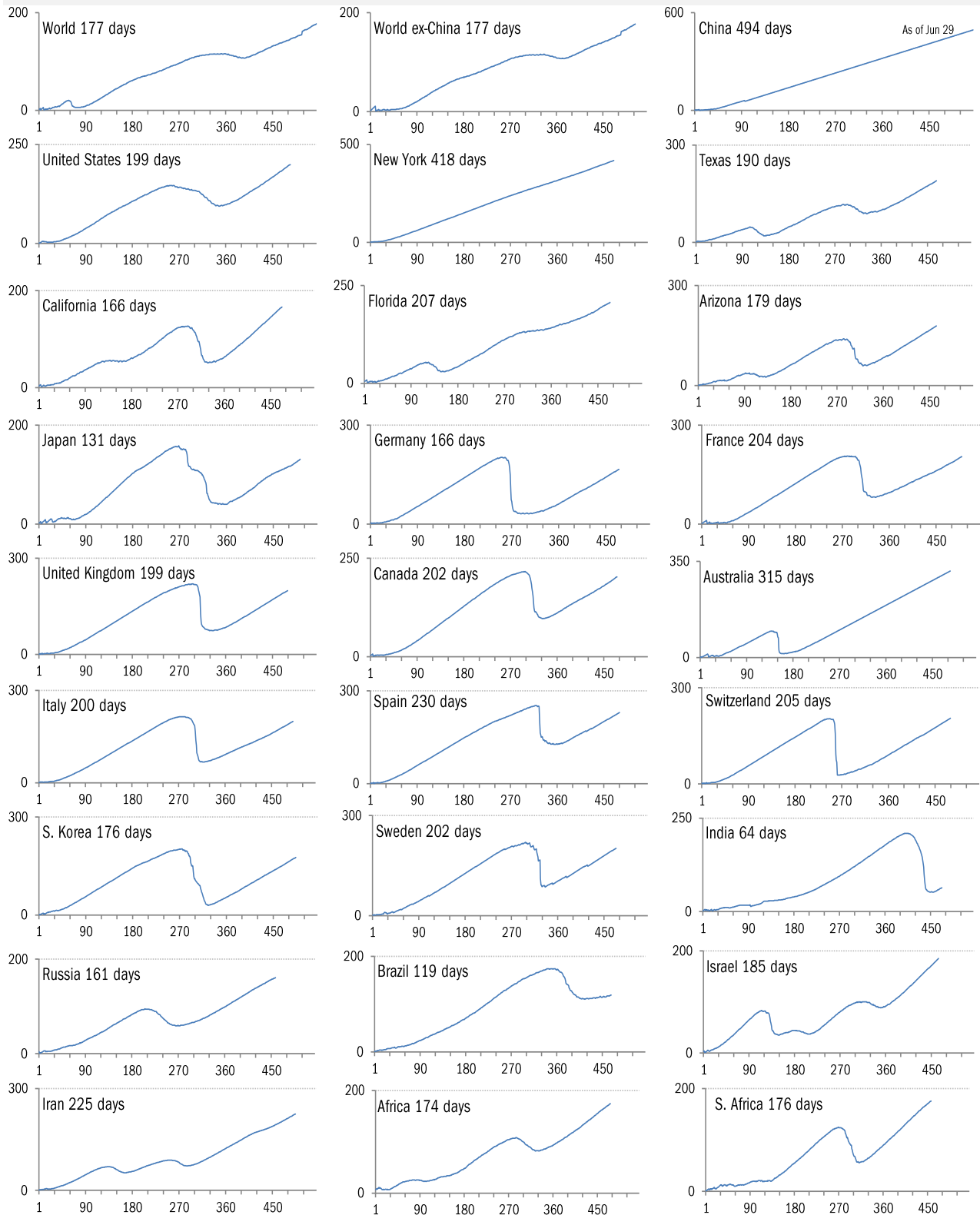


Source: [Johns Hopkins](#), TrendMacro calculations

"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

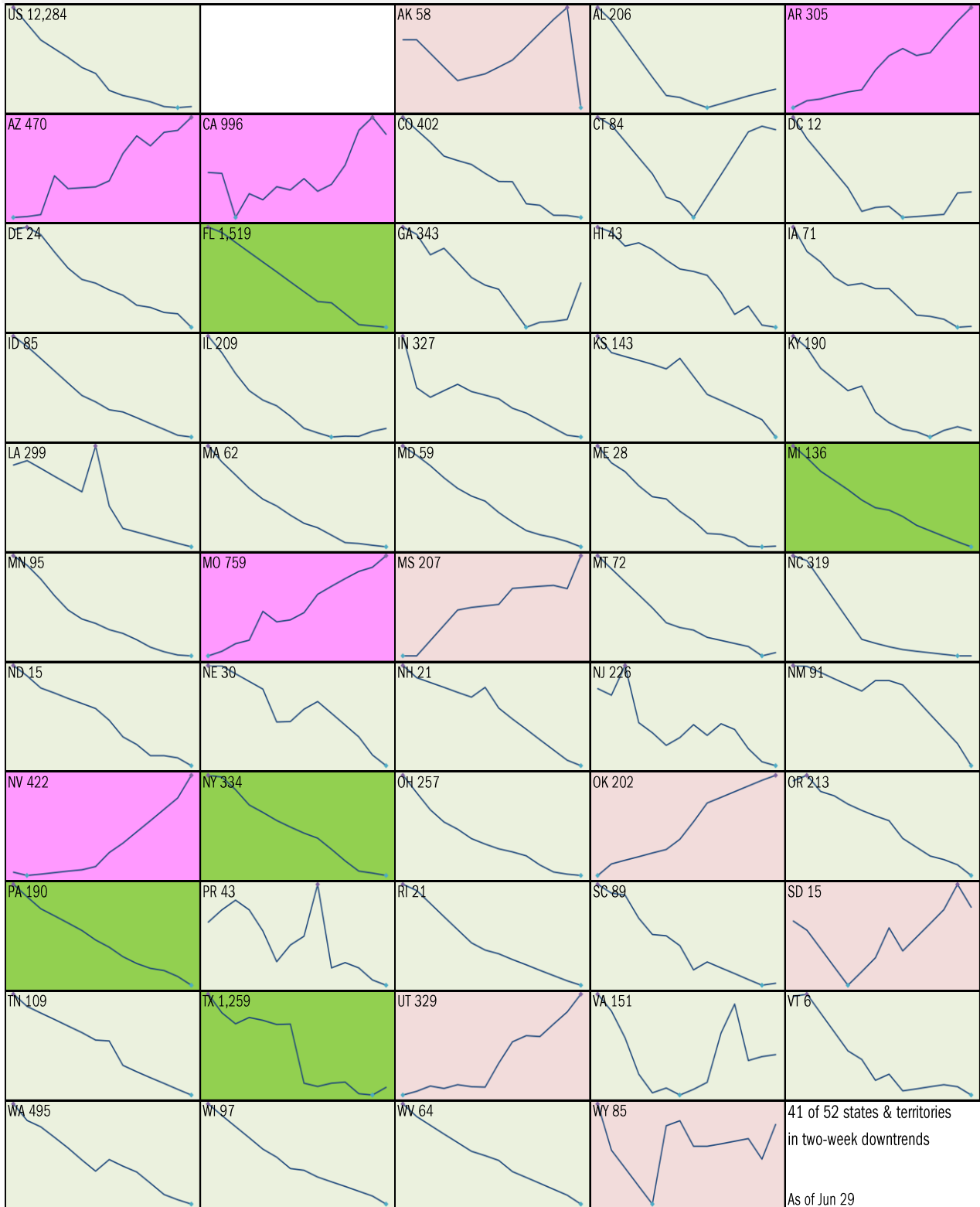


Source: [Johns Hopkins](#), TrendMacro calculations

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

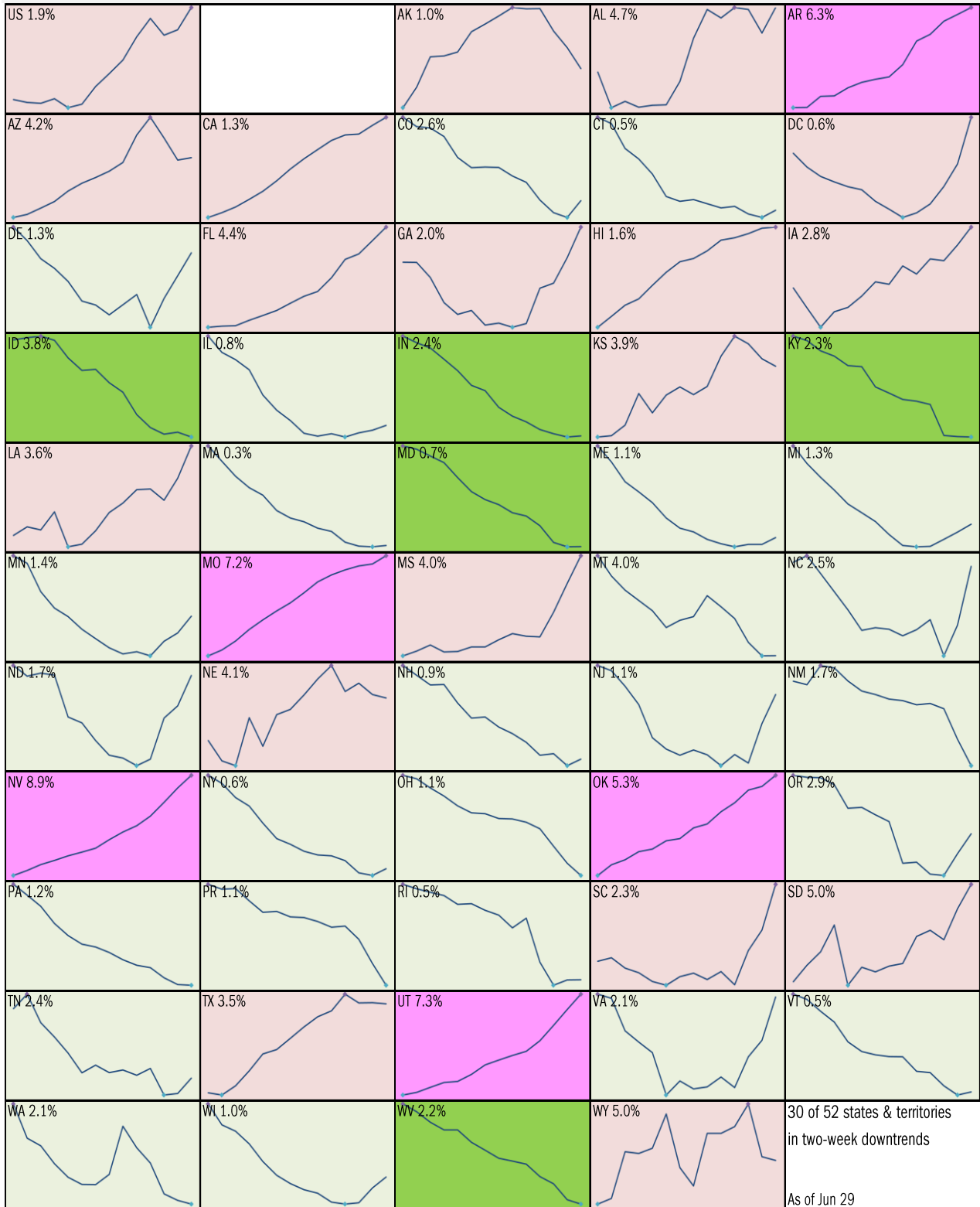


Source: [Johns Hopkins](#), TrendMacro calculations

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

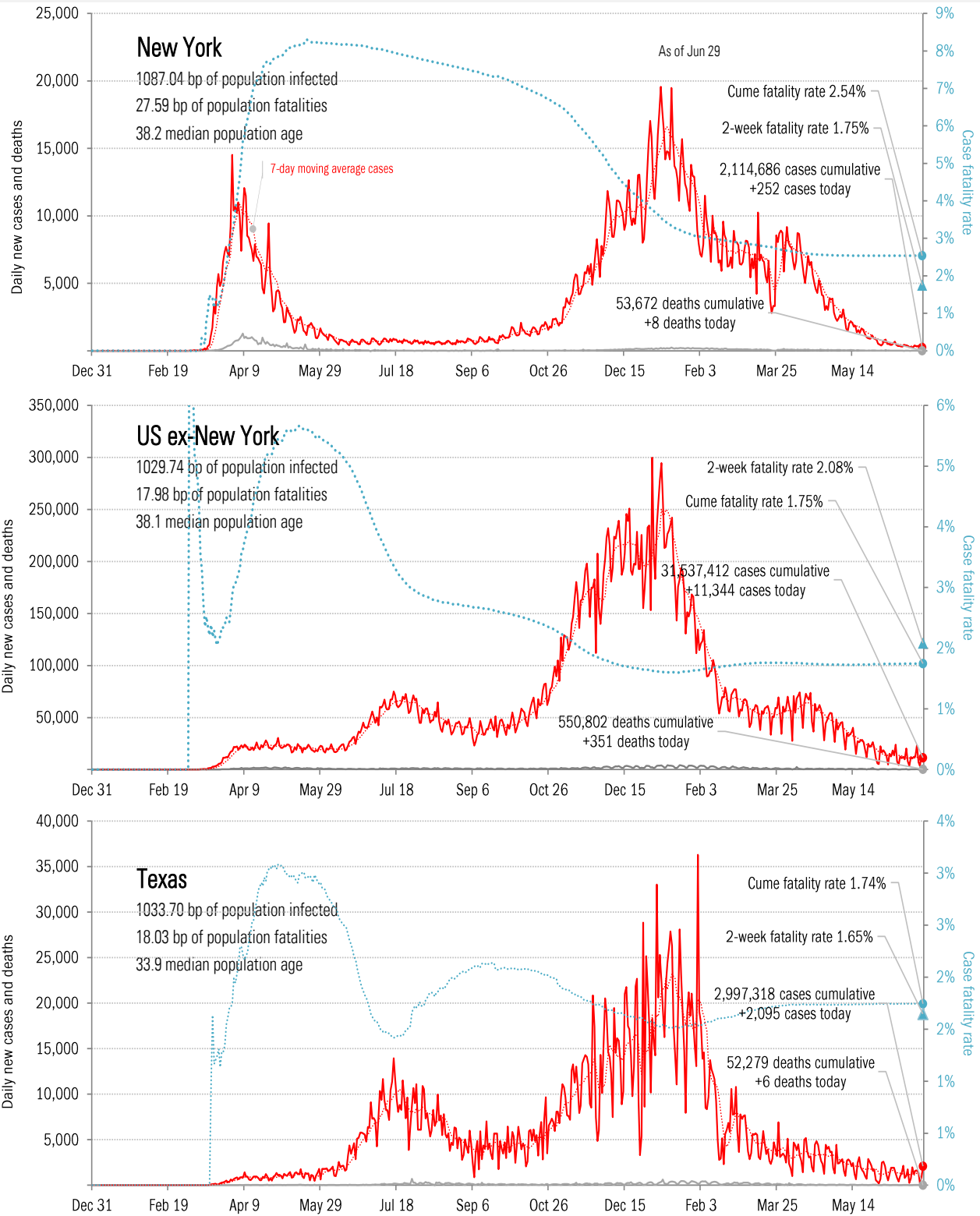
14-day moving average, last 14 days Most recent value displayed ● High ● Low

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



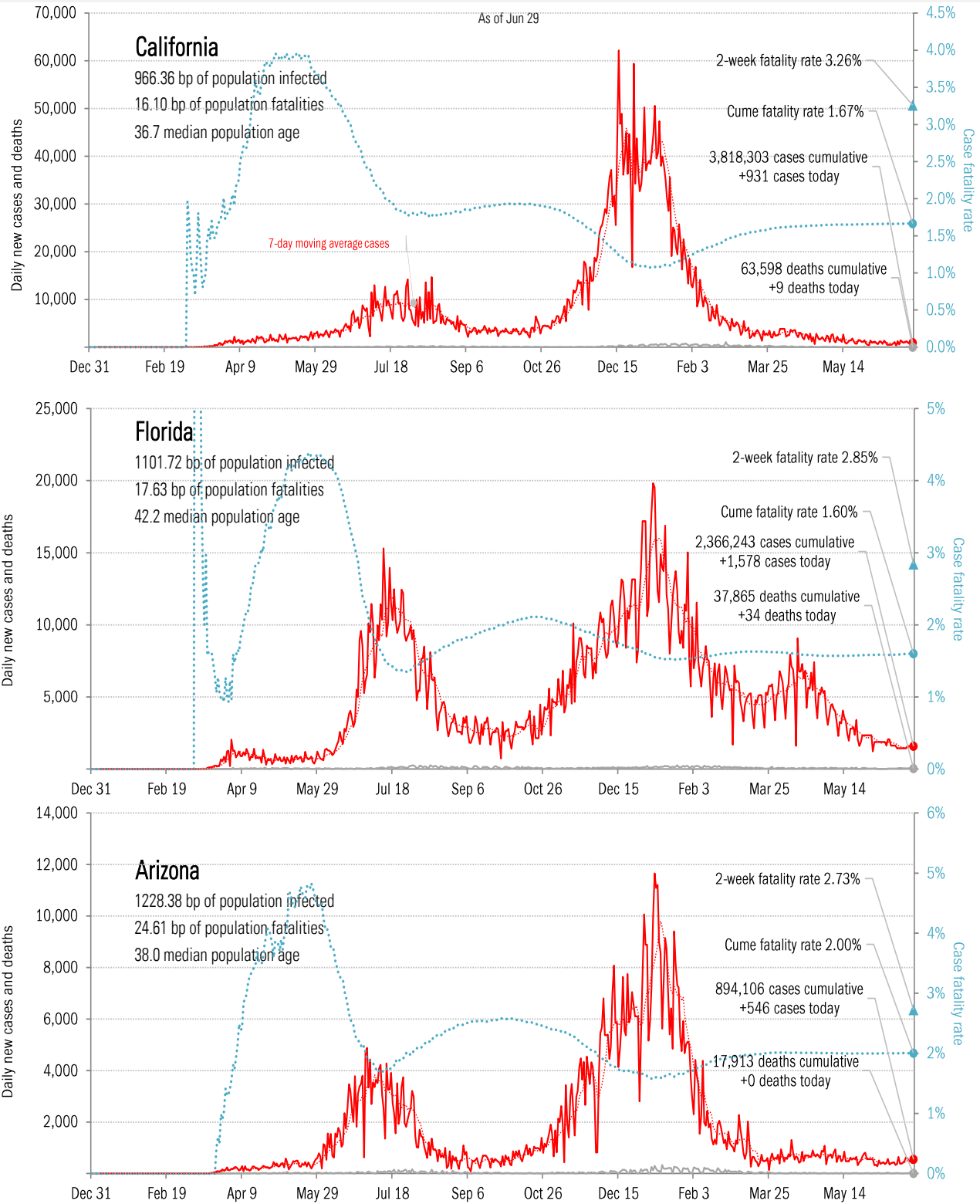
Source: [Covid Act Now](#), TrendMacro calculations

From Ground Zero to the Rio Grande



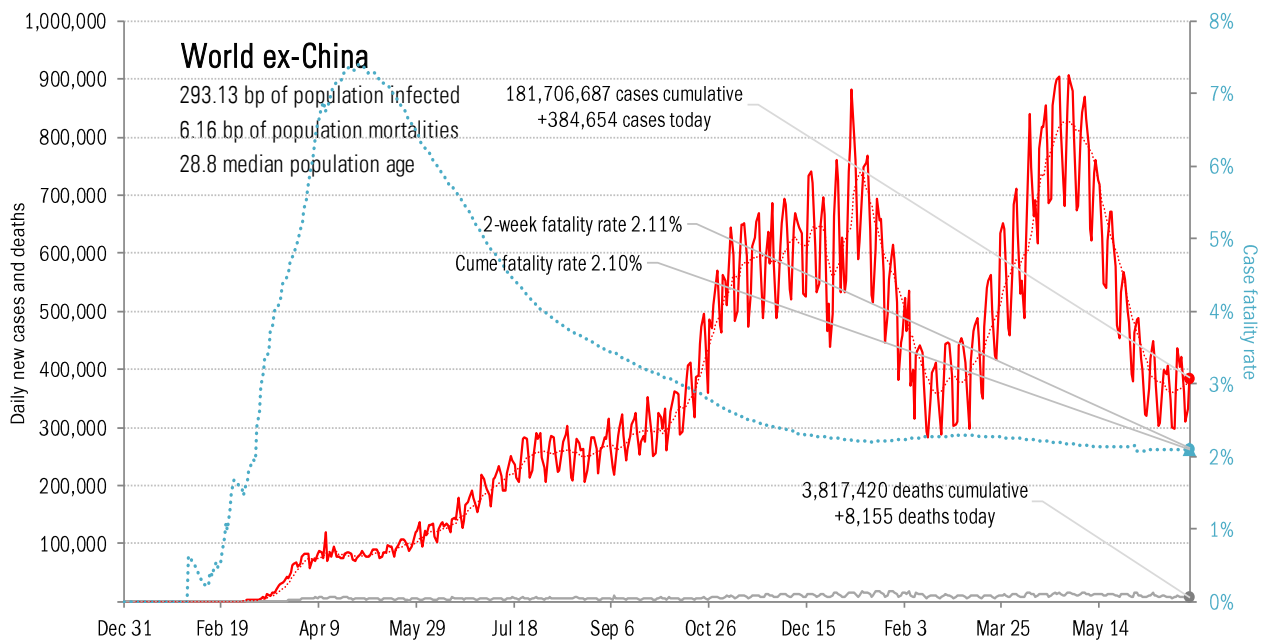
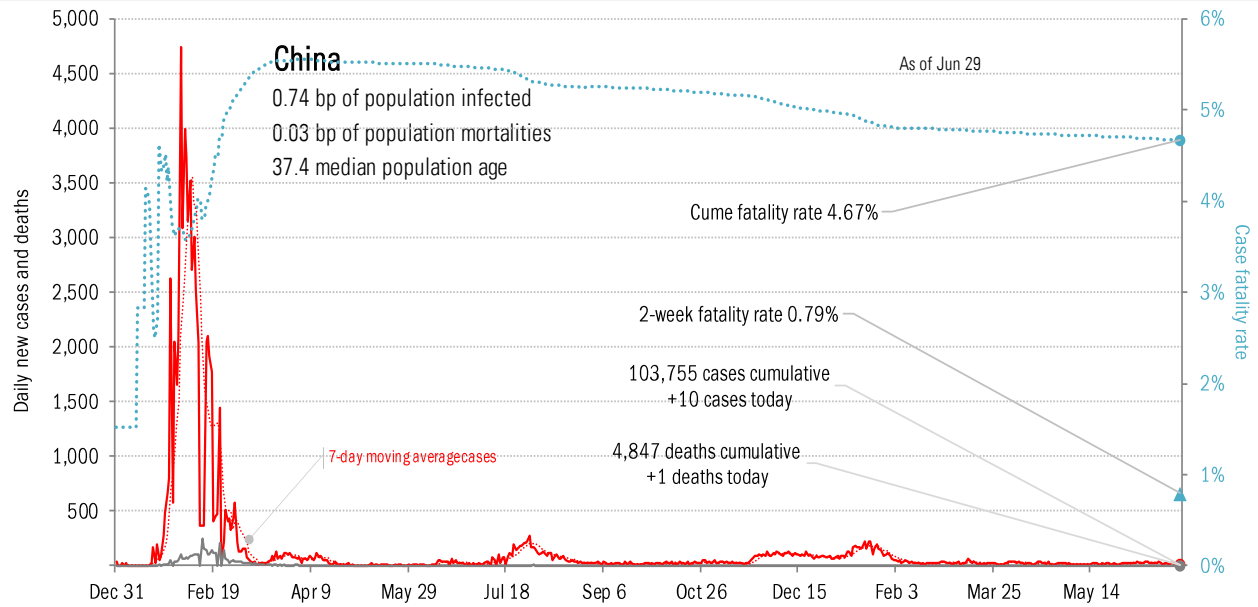
Source: [Johns Hopkins](#), TrendMacro calculations

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



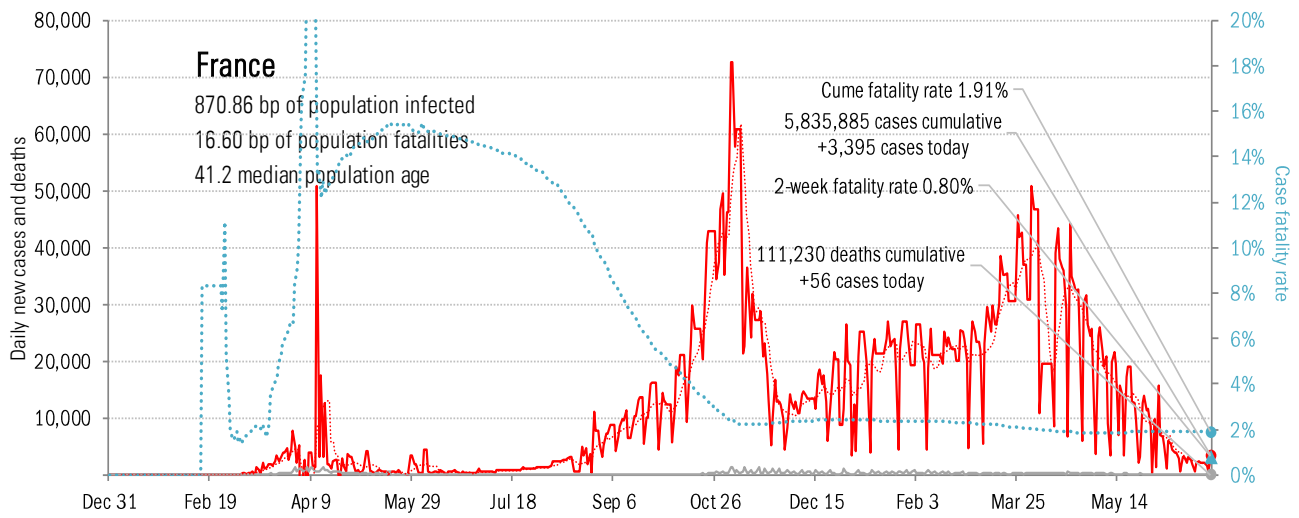
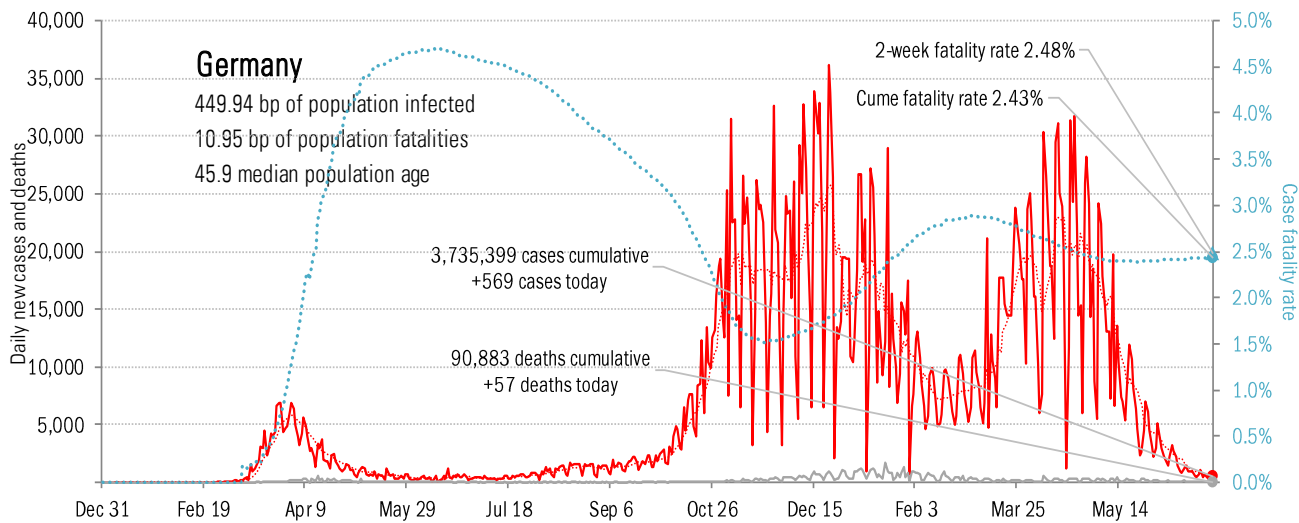
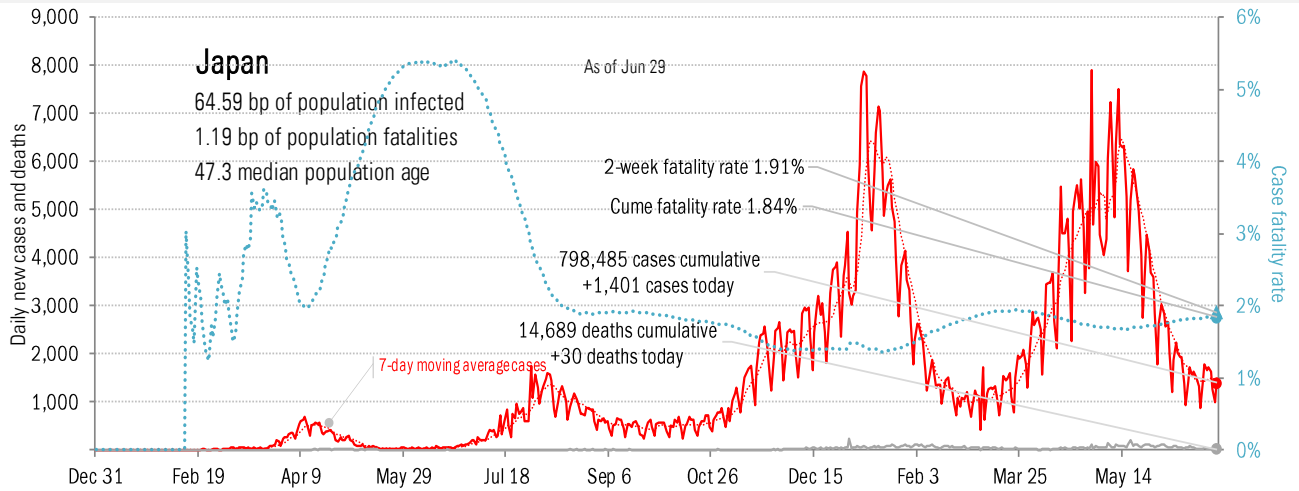
Source: [Johns Hopkins](#), TrendMacro calculations

Patient zero... and then everyone else



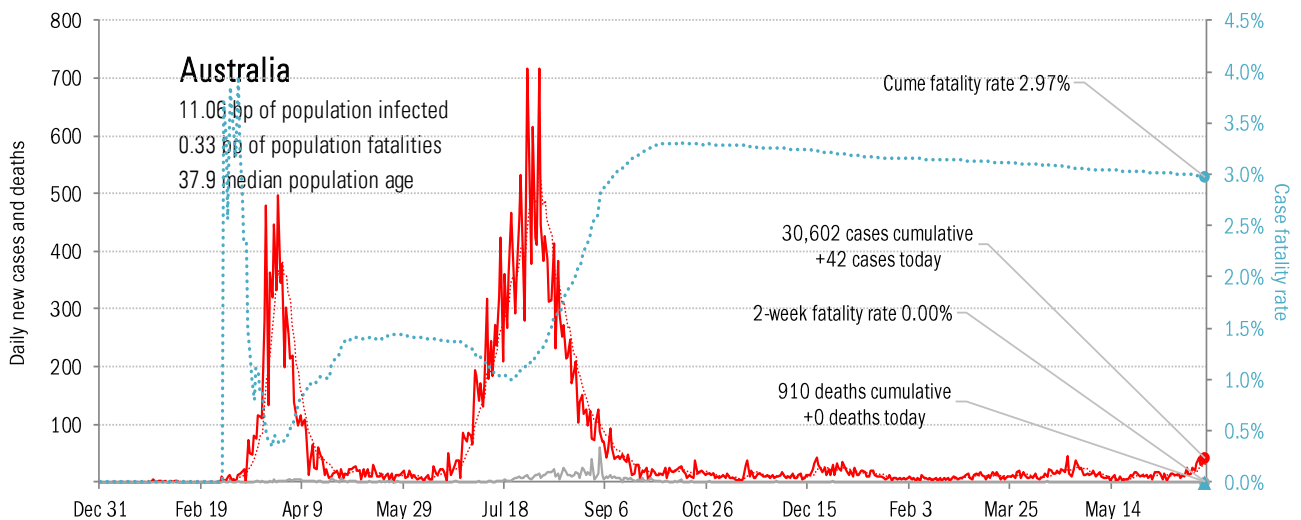
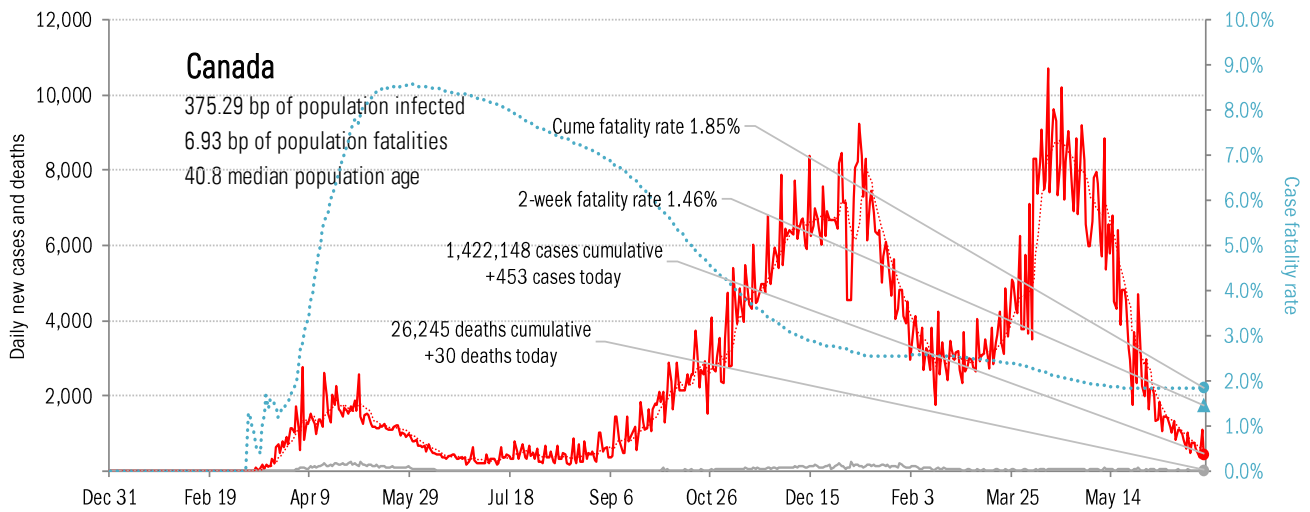
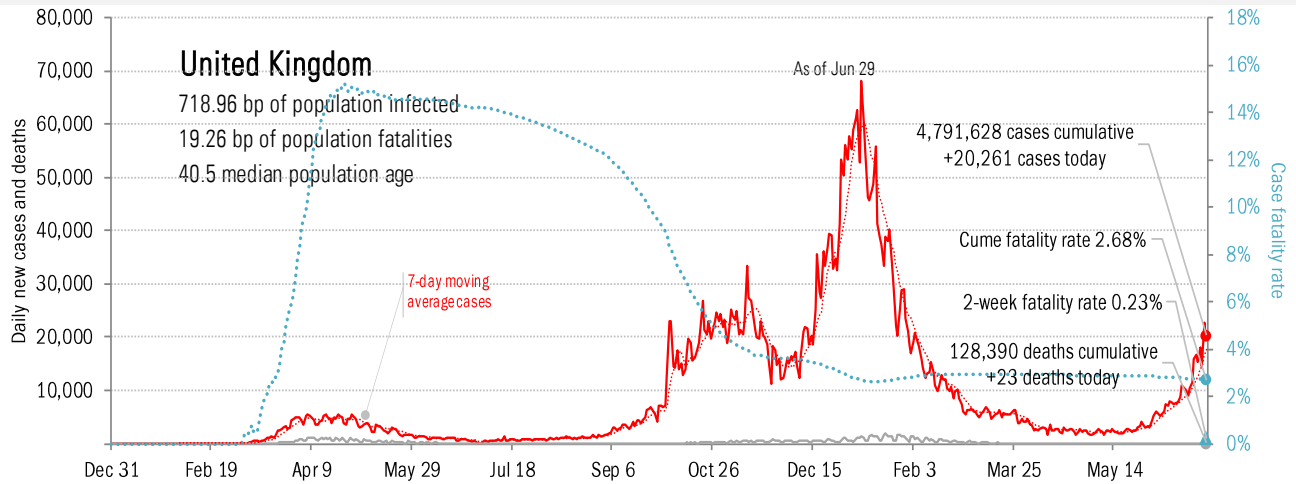
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the largest economies



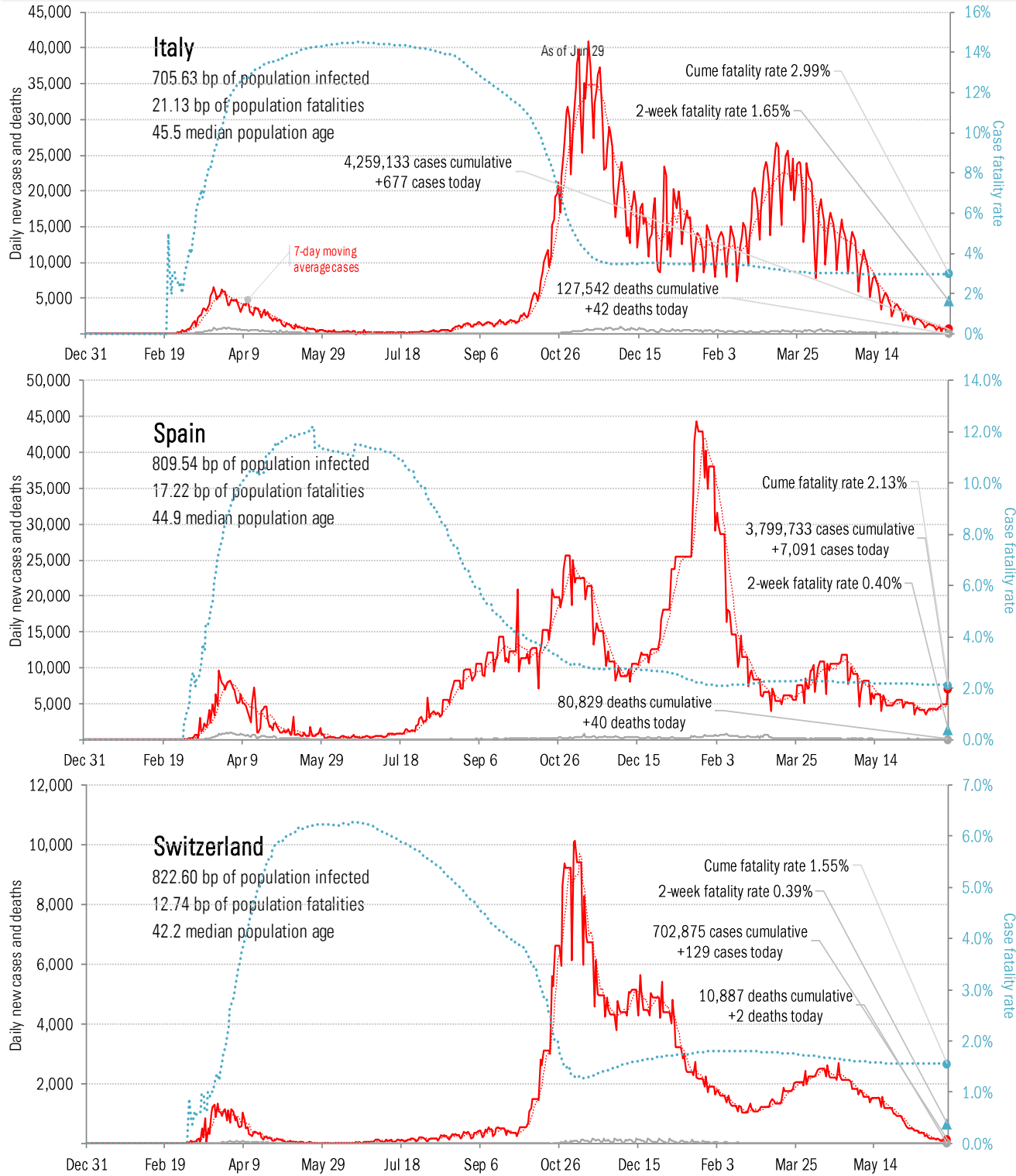
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in The Anglosphere



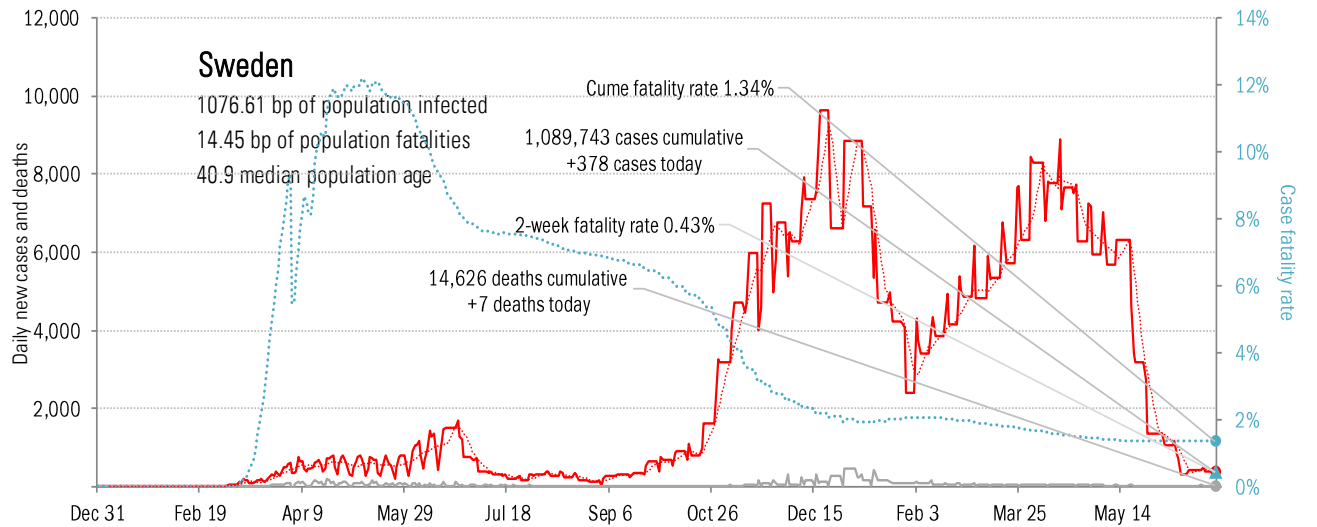
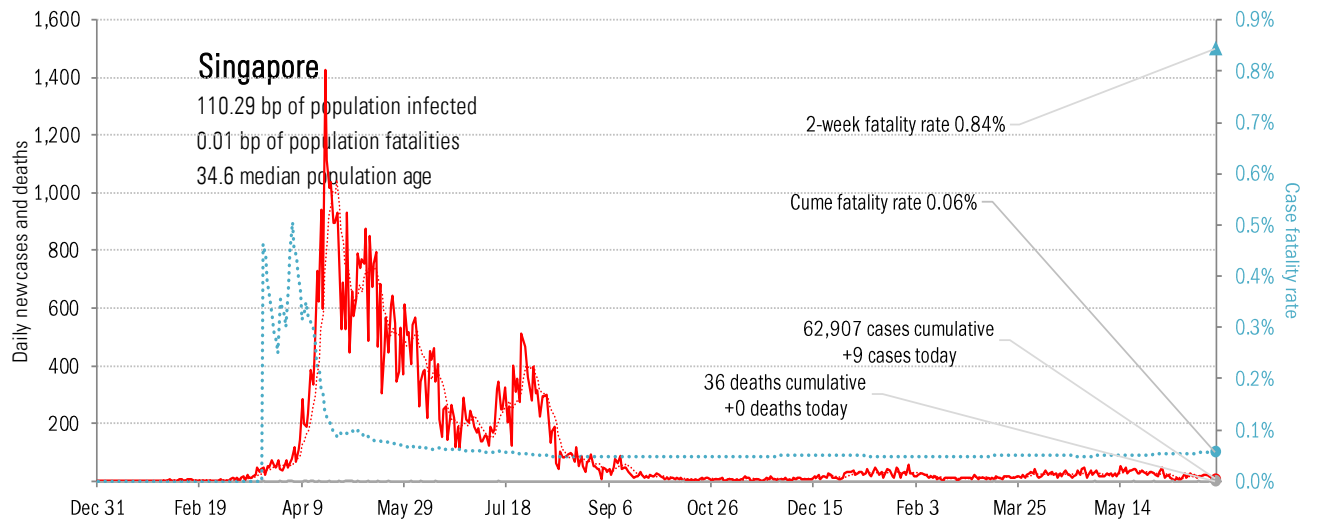
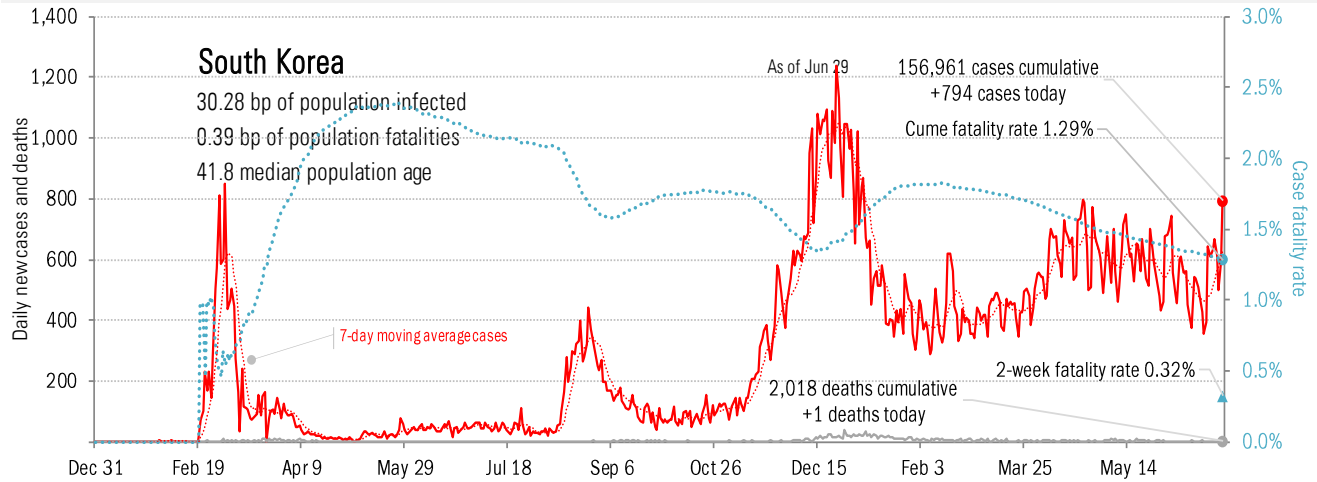
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in continental Europe



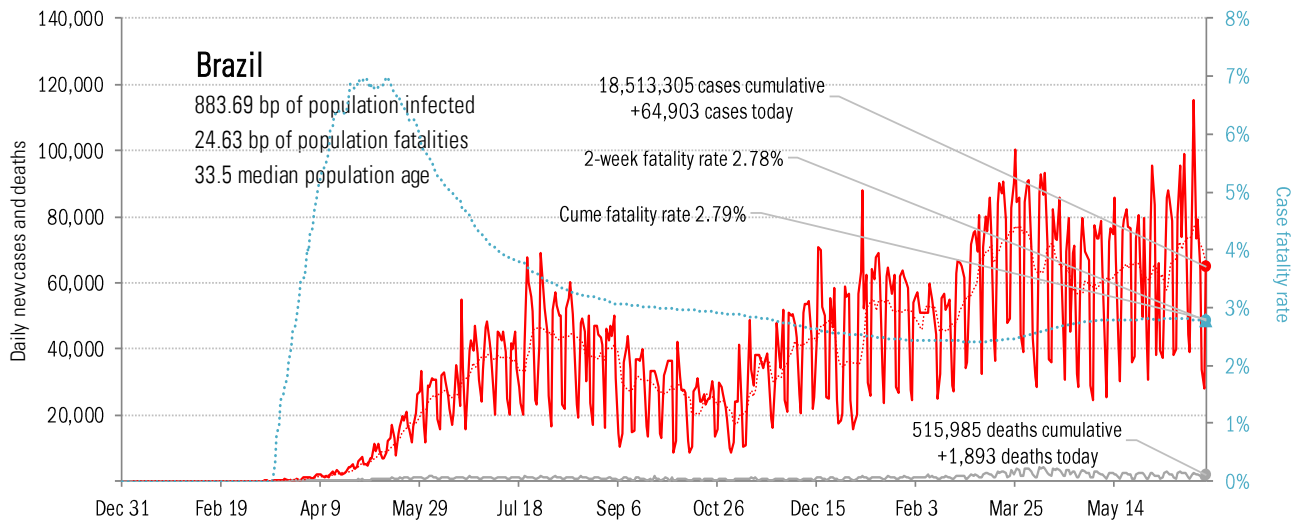
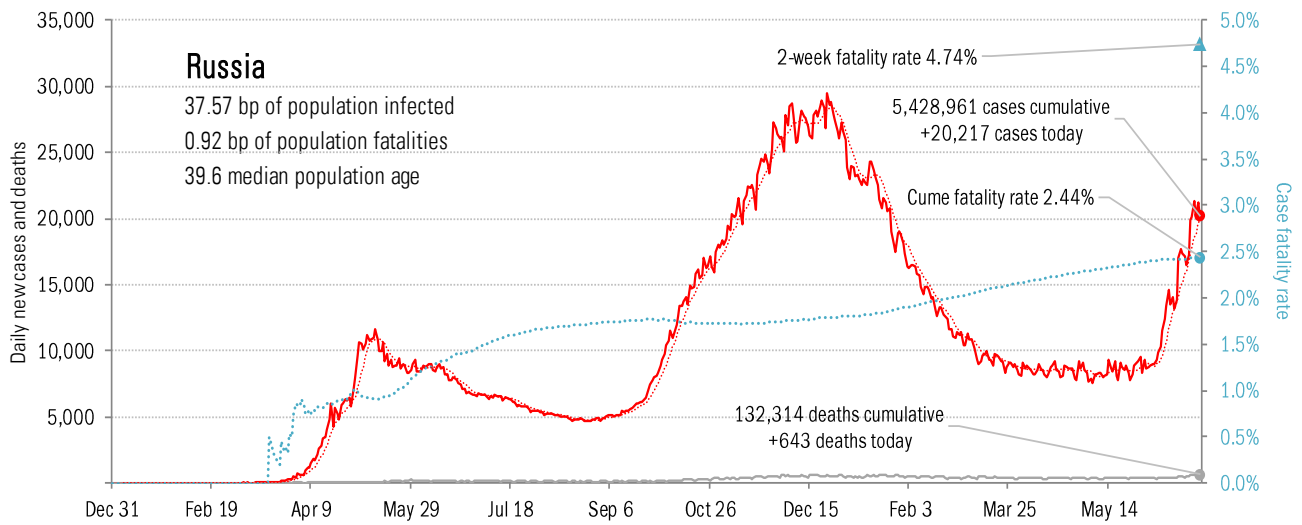
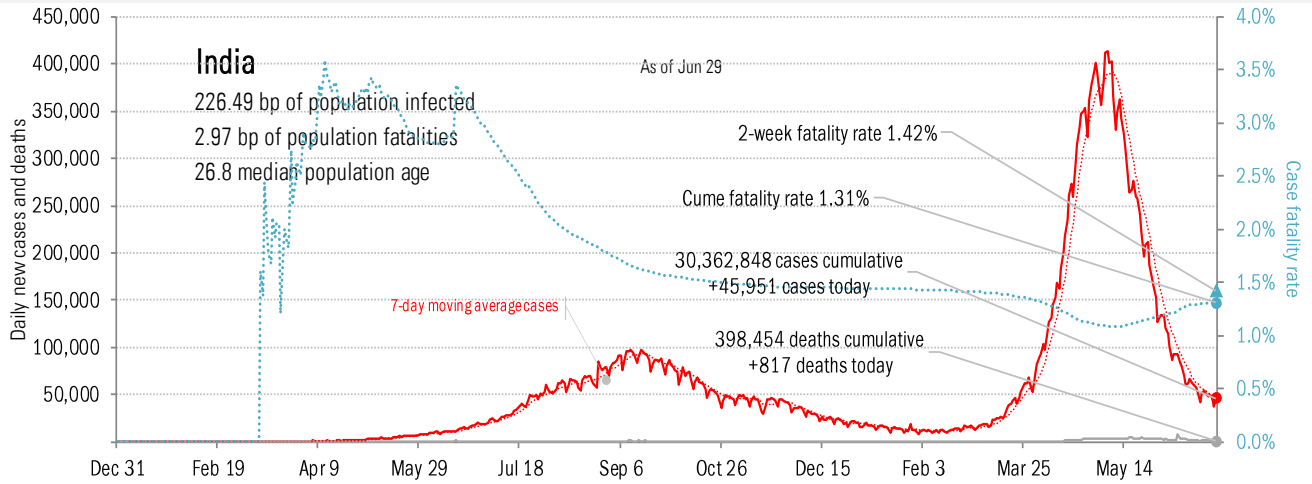
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in other hot-spots



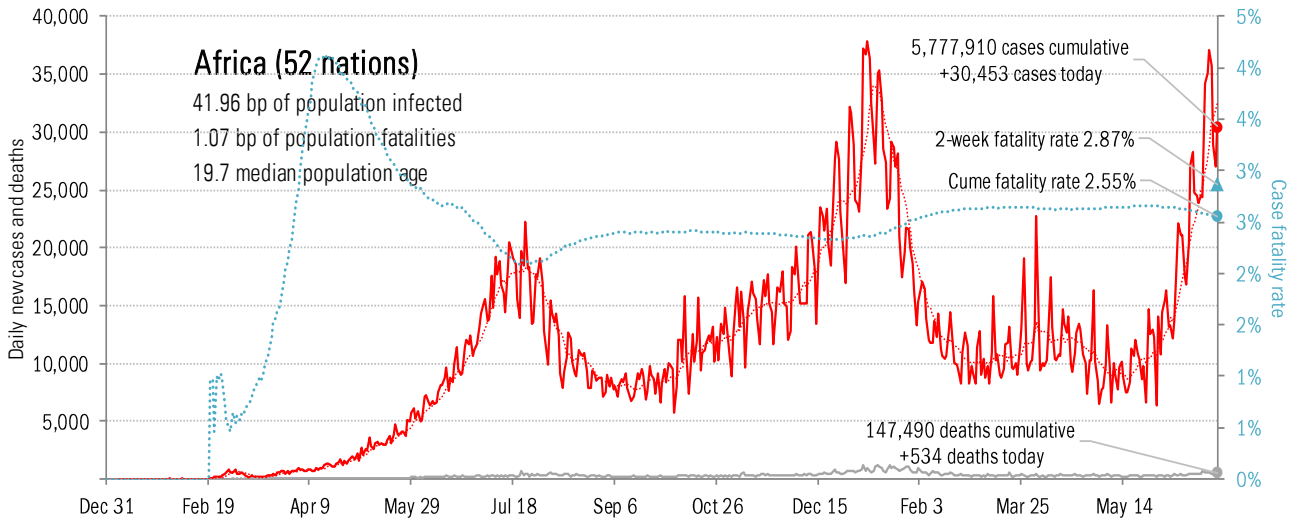
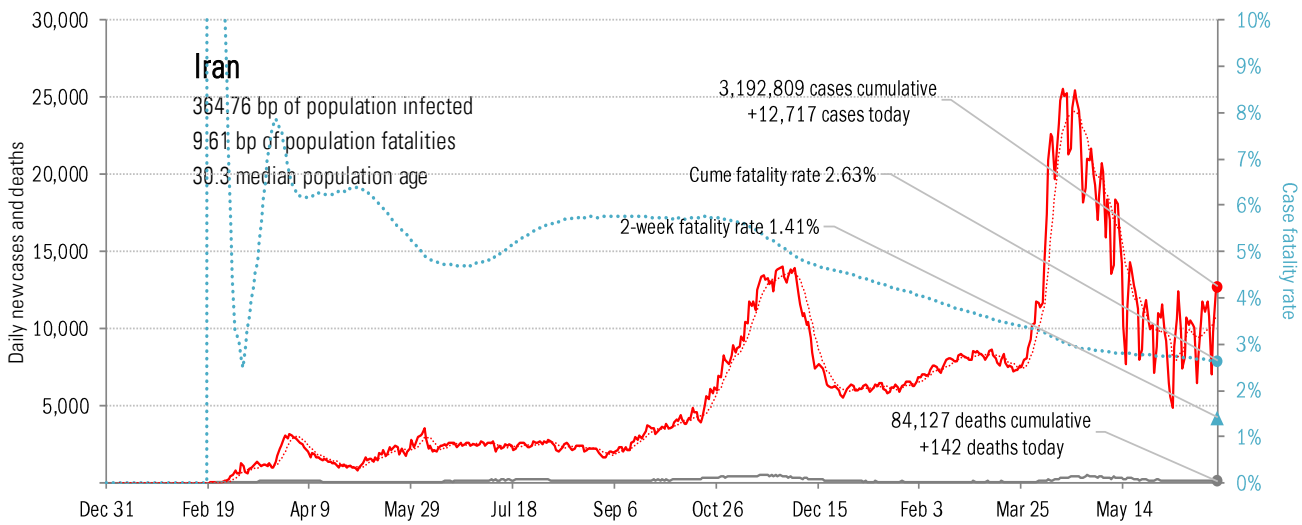
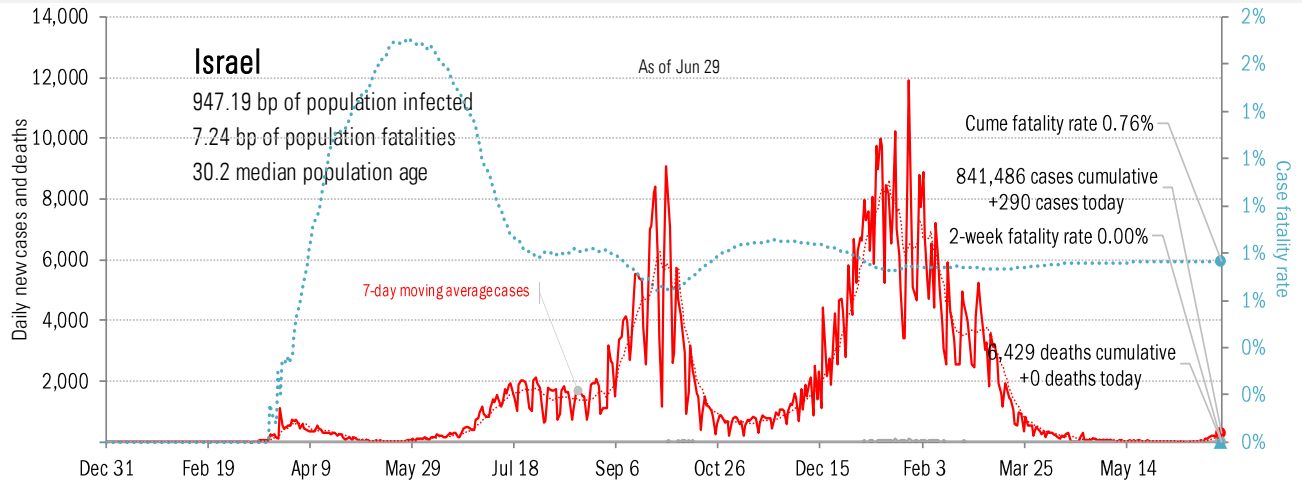
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the BRICs ex-China



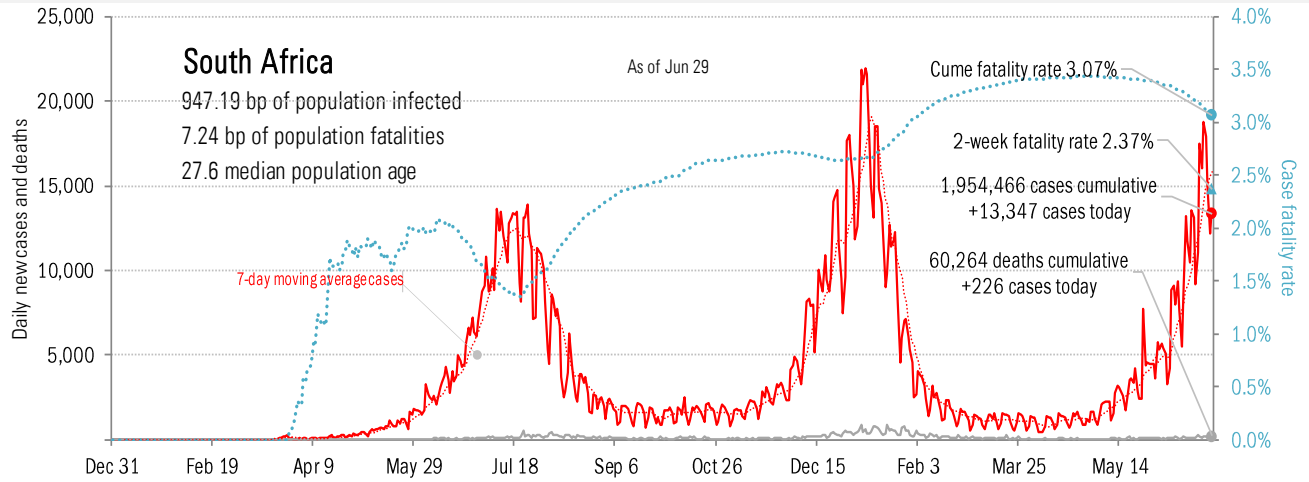
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the Middle East and Africa



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

Impact in Africa, continued



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