

Data Insights: Covid-2019 Monitor

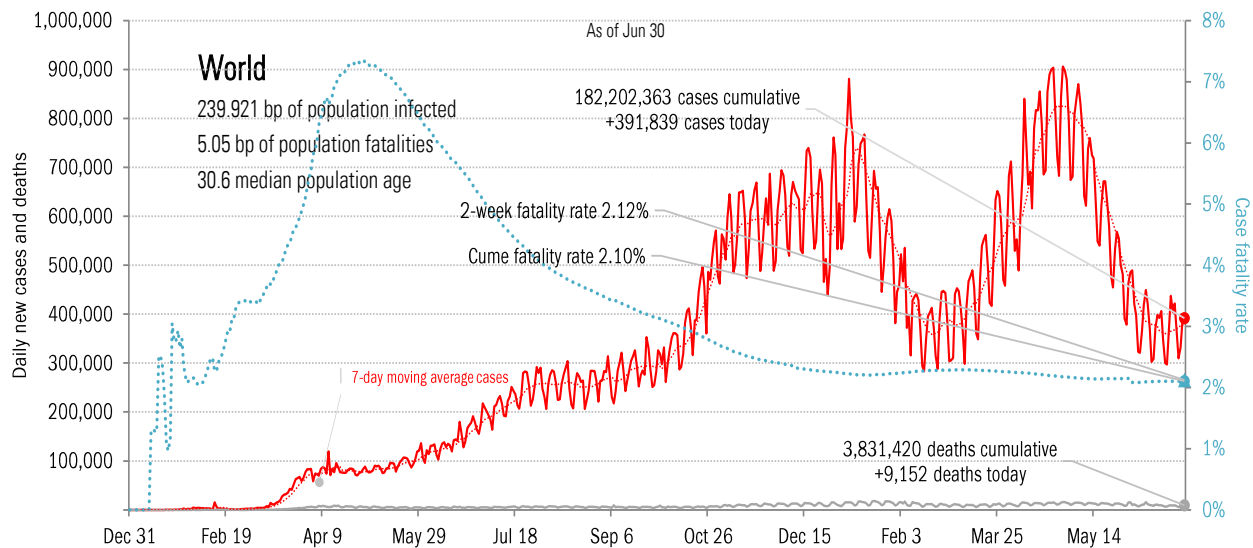
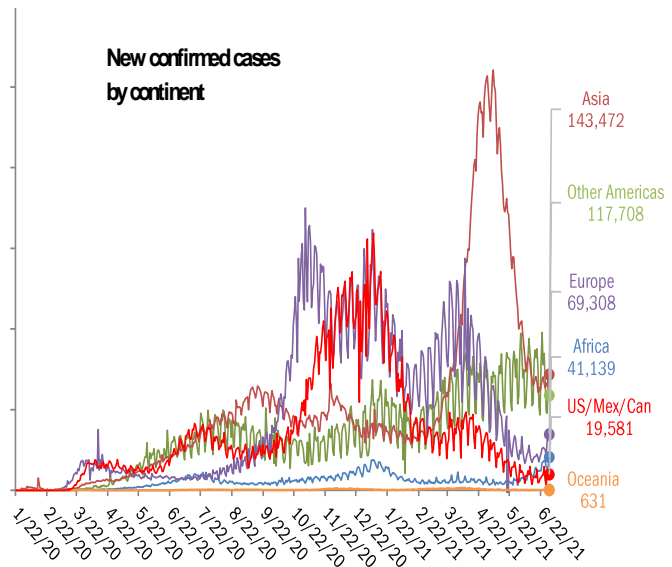
Thursday, July 1, 2021

The global scorecard

The worst ten countries

New cases		New Deaths	
India	+48,786	Brazil	+2,081
Brazil	+43,836	India	+1,005
Colombia	+27,908	Russia	+659
United Kingdom	+25,670	Argentina	+636
Argentina	+22,673	Colombia	+610
Indonesia	+21,807	Indonesia	+467
Russia	+20,633	Peru	+432
South Africa	+19,506	South Africa	+383
United States	+12,872	Mexico	+244
Iran	+11,748	United States	+240
+255,439		+6,757	
World	+391,839	World	+9,152
Top ten	65%	Top ten	74%

New confirmed cases by continent



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

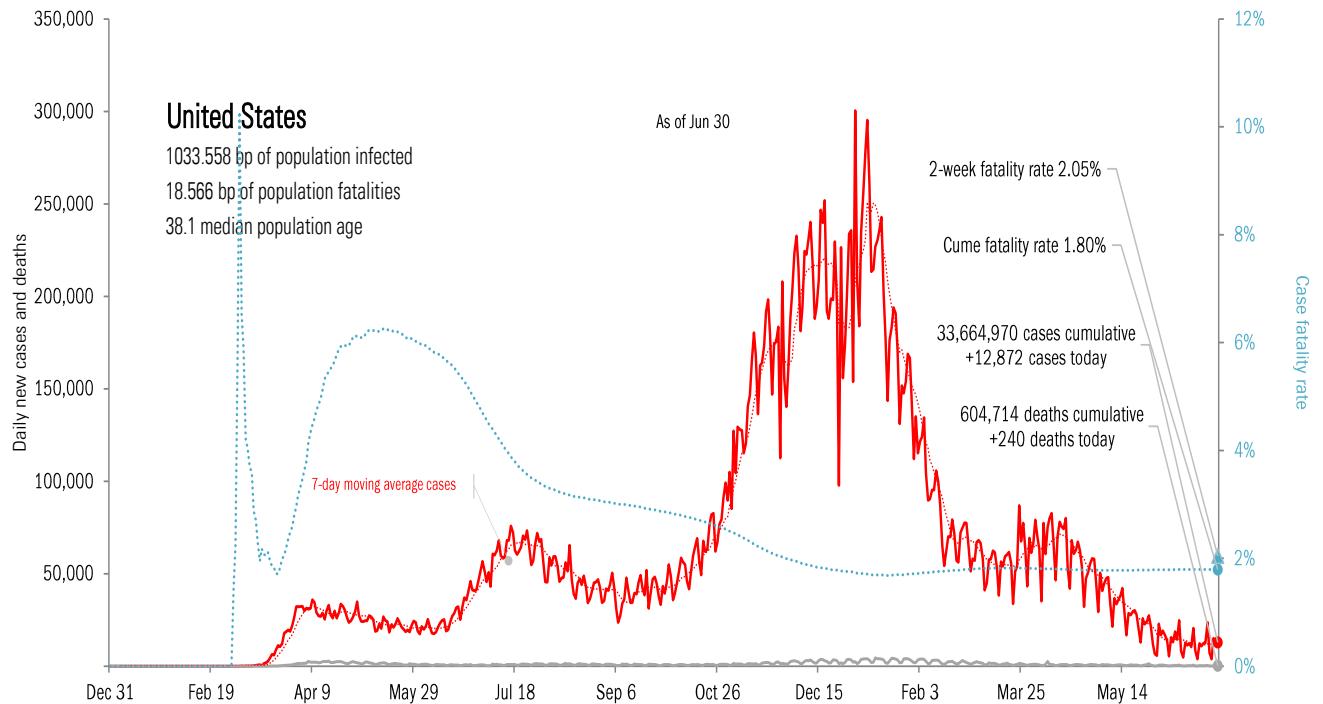
The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
TX	+2,751		TX	+29		FL	+68		CA	3,816,659		CA	63,647		TX	254,492		RI	91%	MO	17%
FL	+1,578		FL	+27		CA	+59		TX	3,000,069		NY	53,679		CA	240,667		MA	82%	AR	14%
MO	+1,325		CA	+26		GA	+27		FL	2,367,821		TX	52,337		FL	187,837		MO	82%	UT	13%
AZ	+769		AL	+14		MI	+23		NY	2,114,986		FL	37,891		NY	136,579		PA	81%	WA	10%
AR	+686		NC	+13		MO	+19		IL	1,391,739		PA	27,678		GA	109,498		GA	80%	NV	10%
LA	+591		NJ	+13		IN	+16		PA	1,216,579		NJ	26,457		PA	91,758		MD	79%	ME	9%
GA	+590		WV	+12		NV	+14		GA	1,134,573		IL	25,660		CH	88,036		MI	79%	CO	9%
UT	+574		GA	+11		TX	+14		CH	1,111,324		GA	21,423		IL	82,664		WV	78%	MT	8%
NV	+558		WA	+10		AZ	+10		NJ	1,023,395		MI	20,999		KY	78,138		FL	78%	TX	8%
AL	+532		MO	+9		MA	+10		NC	1,013,689		CH	20,309		MI	73,238		MN	78%	ID	8%
+9,954			+164			+260			18,190,834			350,080			1,342,907						
All states	+14,450		+267			+178			All states	33,664,970		604,714			2,392,098			All states	70%	67%	
Top ten	69%		61%			146%			Top ten	54%		58%			56%			Median	72%	5%	

Some states not reporting

Five most improved US states

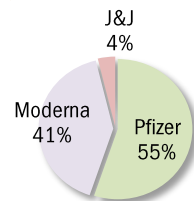
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
CA	-2,575	FL	-66	PA	-29	NC	+250 bp
CH	-77	MO	-32	CT	-16	NM	+80 bp
NV	-67	MI	-29	KY	-15	MT	+60 bp
NC	-66	CH	-28	AL	-10	MN	+50 bp
MT	-48	WI	-15	AR	-9	MP	+40 bp



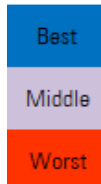
Source: [Johns Hopkins](#), [Dept. of Health and Human Services](#), [CDC](#), TrendMacro calculations

Rolling out the vaccines in the US and the world

US overall	Total				Today	Immunity	Full	Partial
Doses distributed	394,550,015				+0.118 million	US	46.3%	54.0%
Doses administered	336,155,034				+1.407 million	UK	48.4%	65.9%
Administered	One dose	% Pop	Immune	% pop	New immune today	France	29.7%	49.6%
Total population	185,342,806	55%	159,039,868	48%	+0.692 million	Spain	37.5%	54.2%
Age 12 to 17	8,810,364	35%	6,559,541	26%	+0.101 million	Germany	36.2%	54.1%
Age 18 to 64	126,629,439	62%	108,180,912	53%	+0.487 million	Italy	31.0%	56.3%
Age 65 and over	49,688,047	91%	44,179,465	81%	+0.103 million	Australia	5.9%	24.1%



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 **102 days** by Oct 10, 2021

59.0% of population >18 immunized
11.5% previously tested positive
70.5% vs 60% adult herd immunity*

Global data differs from sources, timing

AK
60.8%
49.0%
42.9%

ME
72.7%
66.3%
61.0%

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As of Jun 30

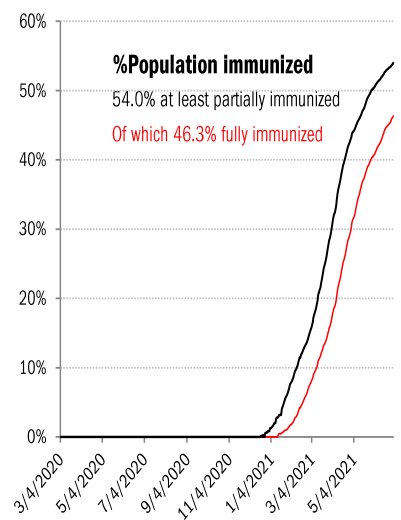
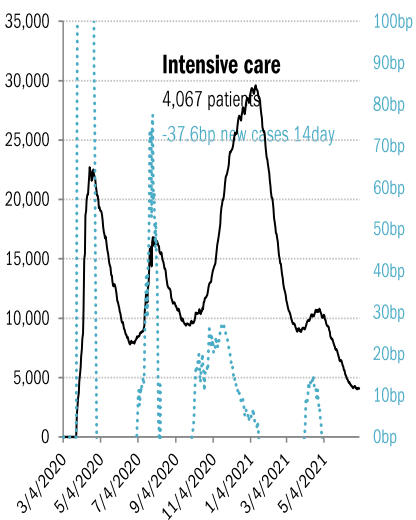
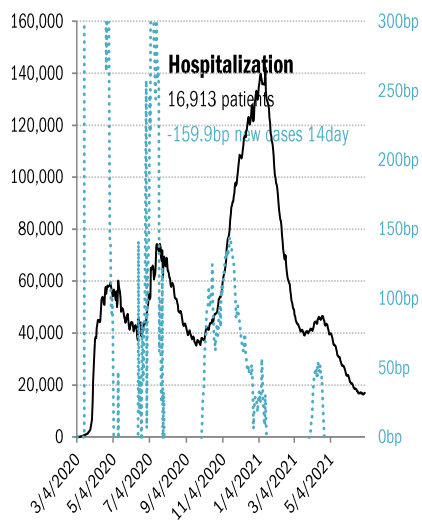
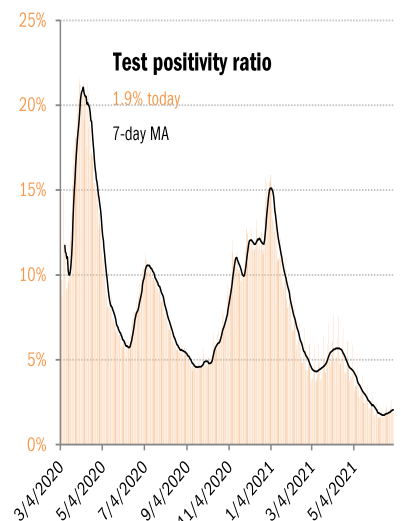
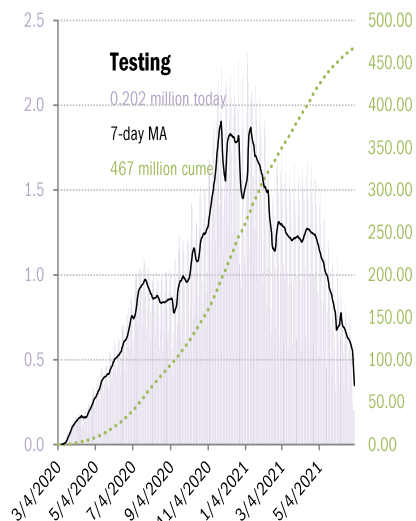
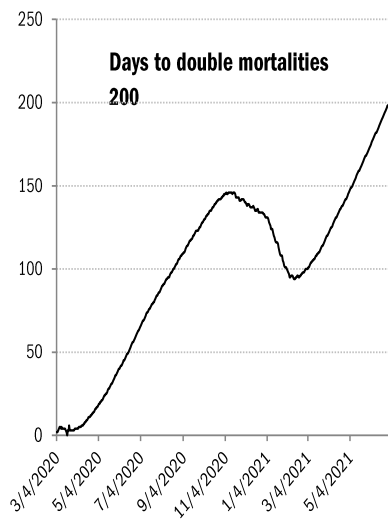
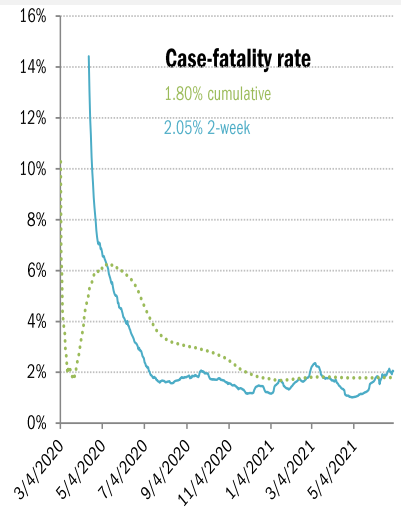
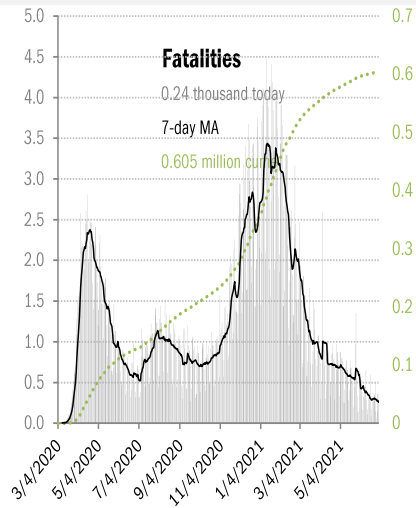
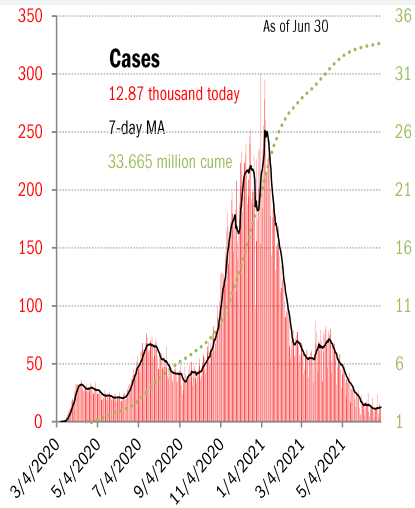
* Includes persons >18 fully immunized or previously tested positive, no overlap. Disregards untested positives, natural immunities.

** 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

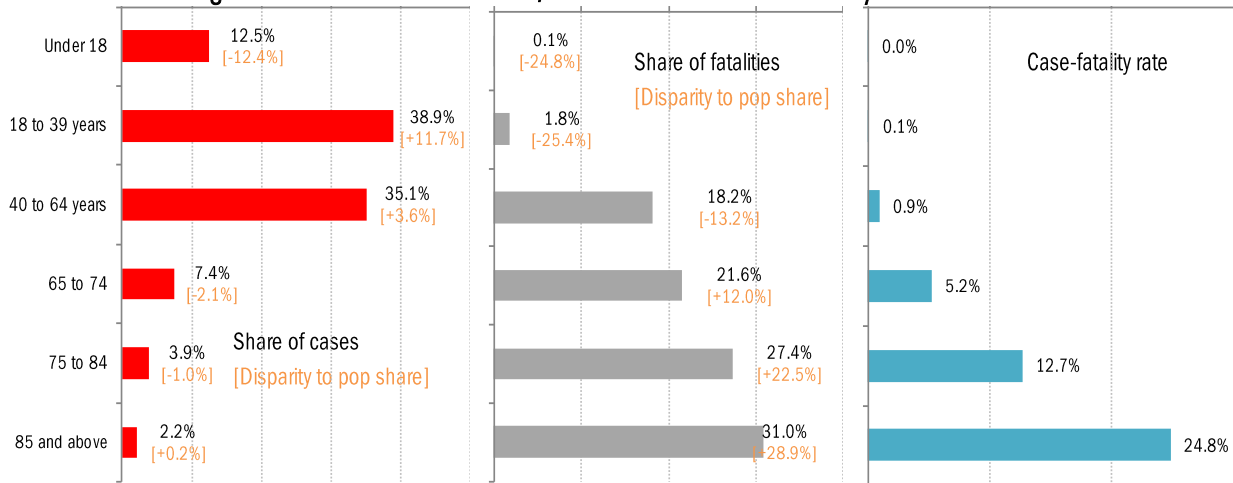
US deep-dive

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

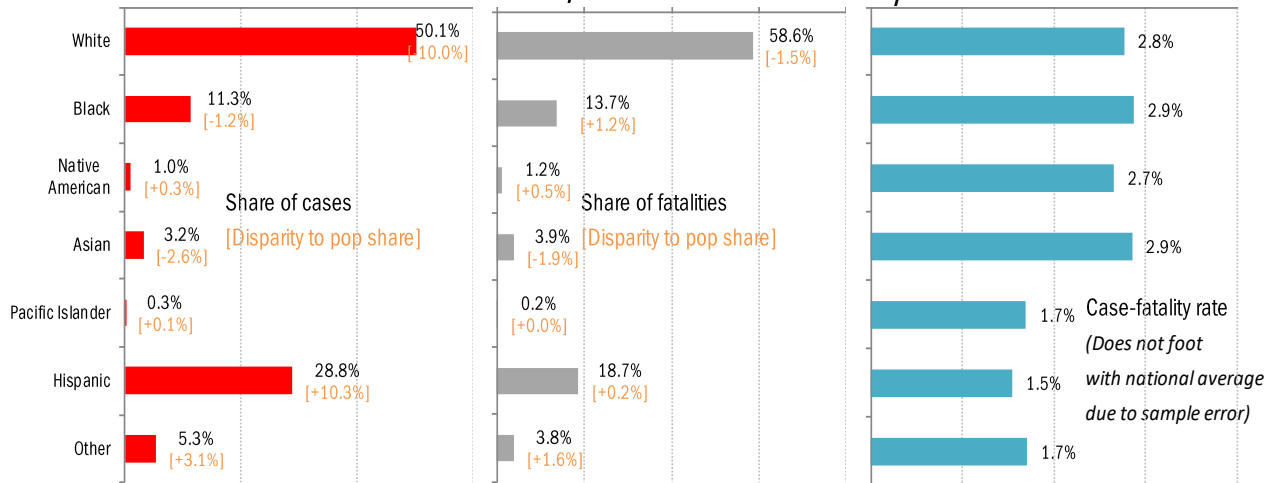


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations

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

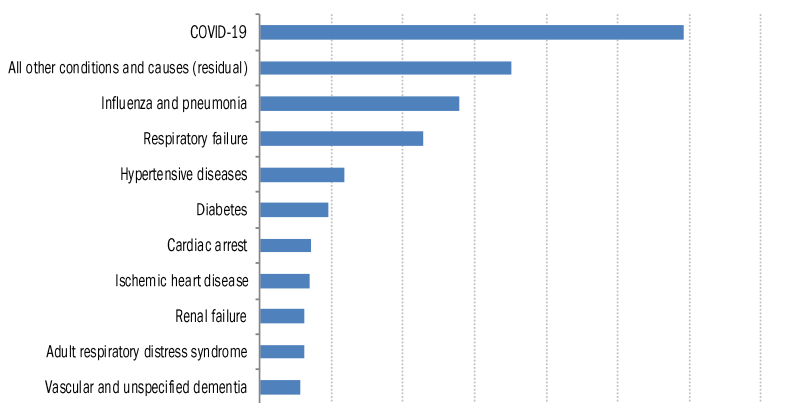


Racial distribution of US cases, fatalities and case-fatality rates



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

[It's not the heat. It's the existential dread.](#)

Charlie Warzel
Washington Post
June 29, 2021

[Inside the risky bat-virus engineering that links America to Wuhan](#)

Rowan Jacobsen
archive page
MIT Technology Review
June 29, 2021

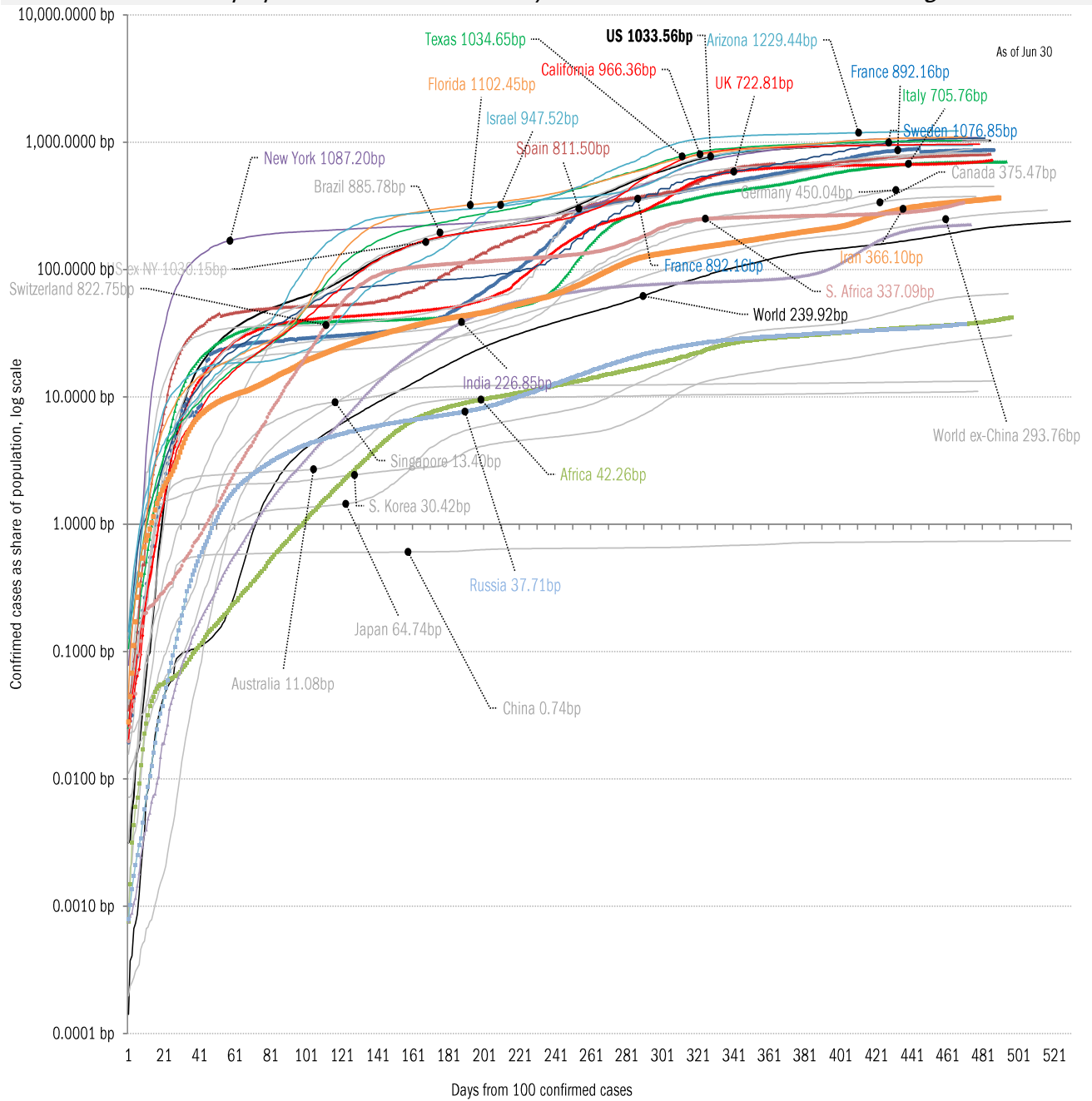
Meme of the day

Fauci now says "putting a fan on your head to "blow" the virus away is better than a mask".....



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

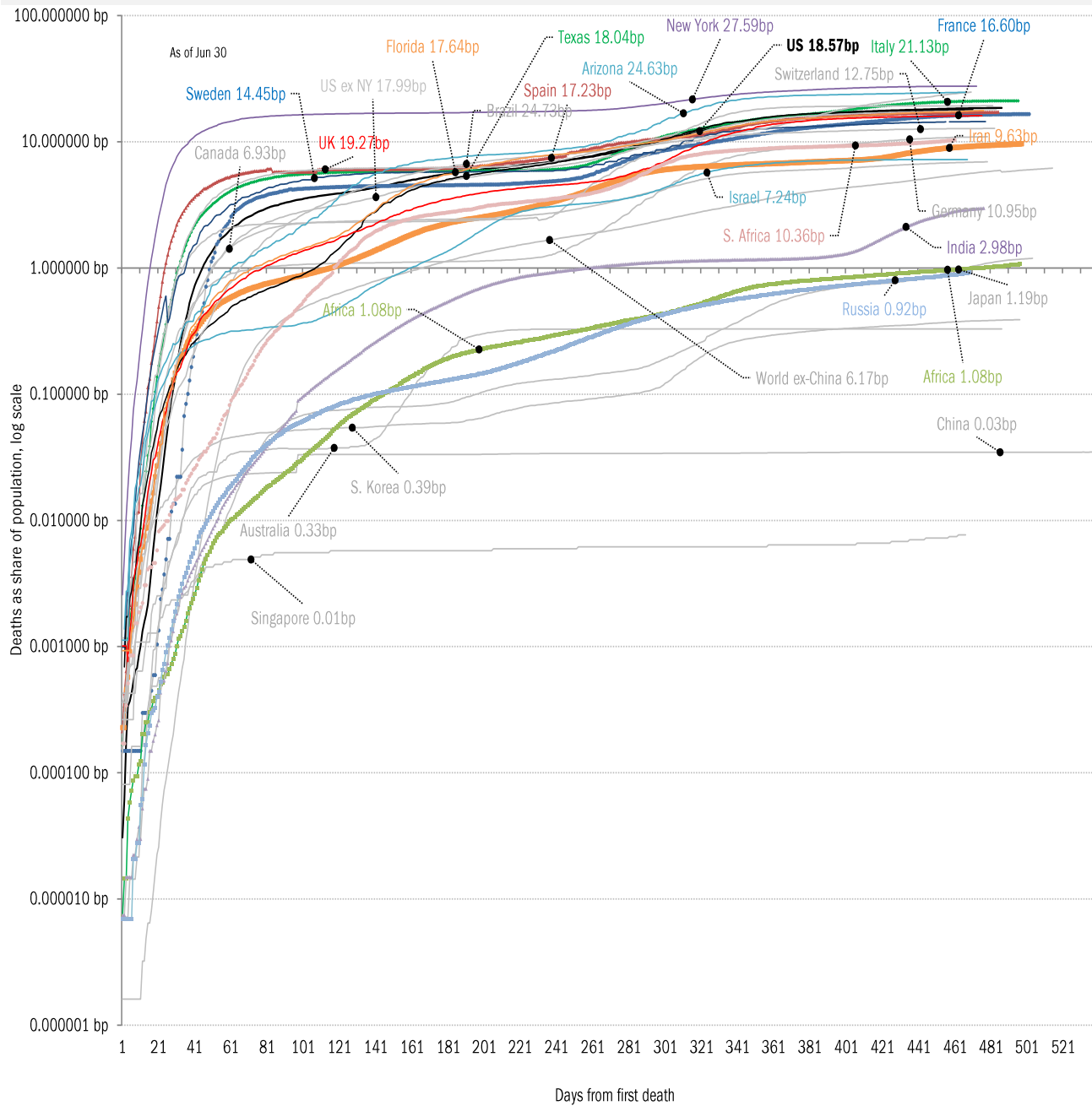
The coronavirus case accelerometer... tracking the world's infection curves
Share of infected population from first day with 100 confirmed cases, log scale



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

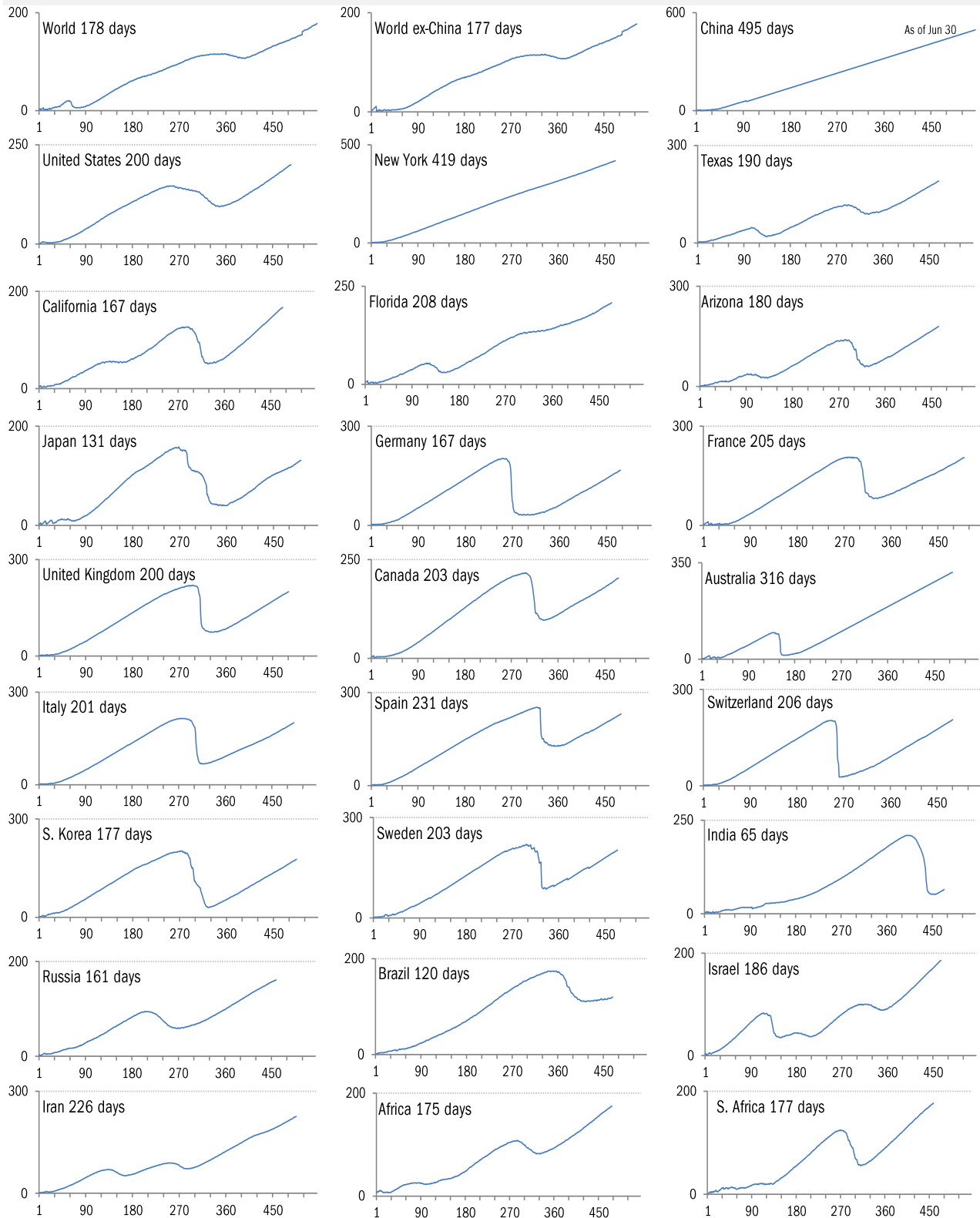


Source: [Johns Hopkins](#), TrendMacro calculations

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

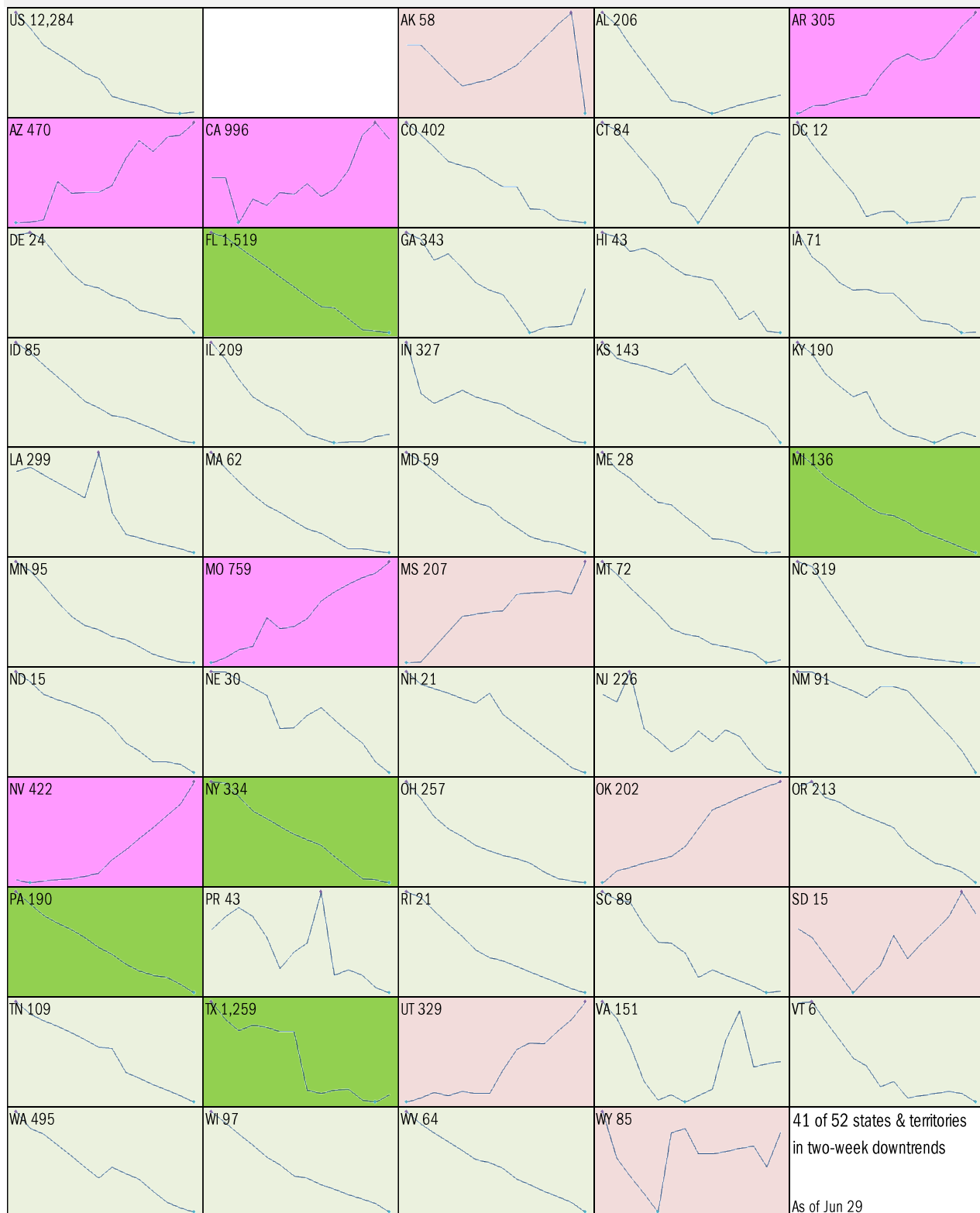
Vertical: days to double deaths Horizontal: days from first death

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

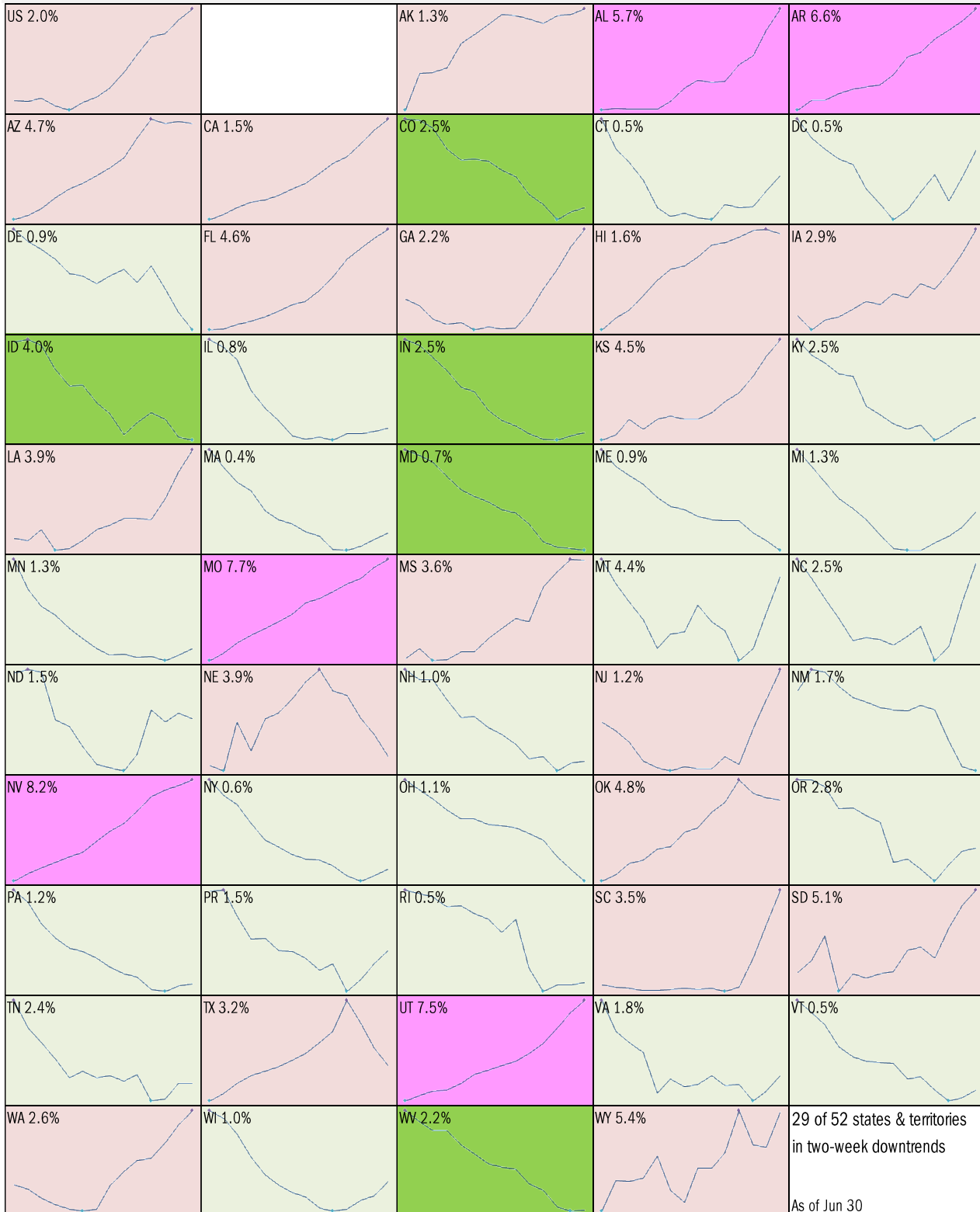


Source: [Johns Hopkins](#), TrendMacro calculations

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

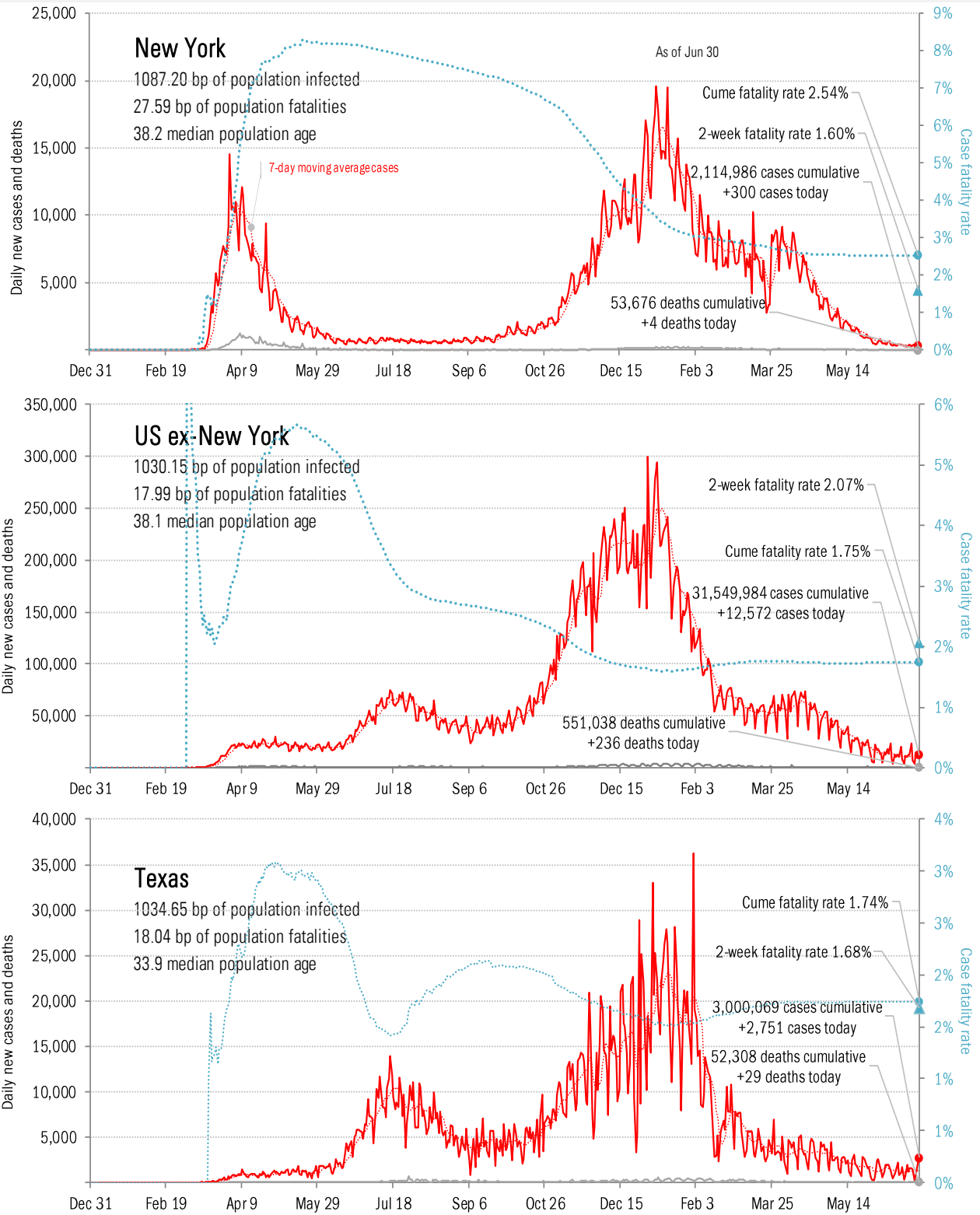
14-day moving average, last 14 days Most recent value displayed ● High ● Low

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



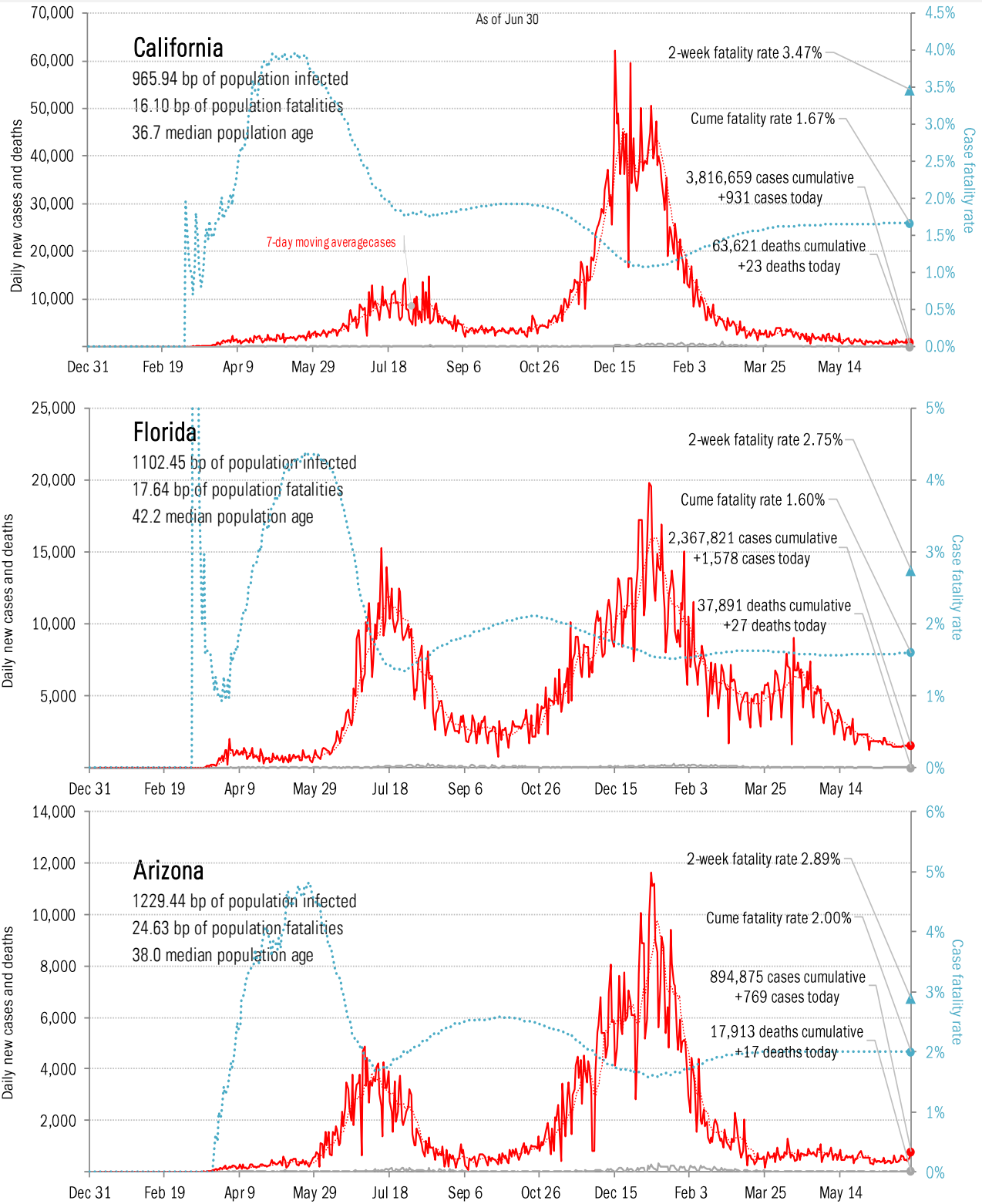
Source: [Covid Act Now](#), TrendMacro calculations

From Ground Zero to the Rio Grande



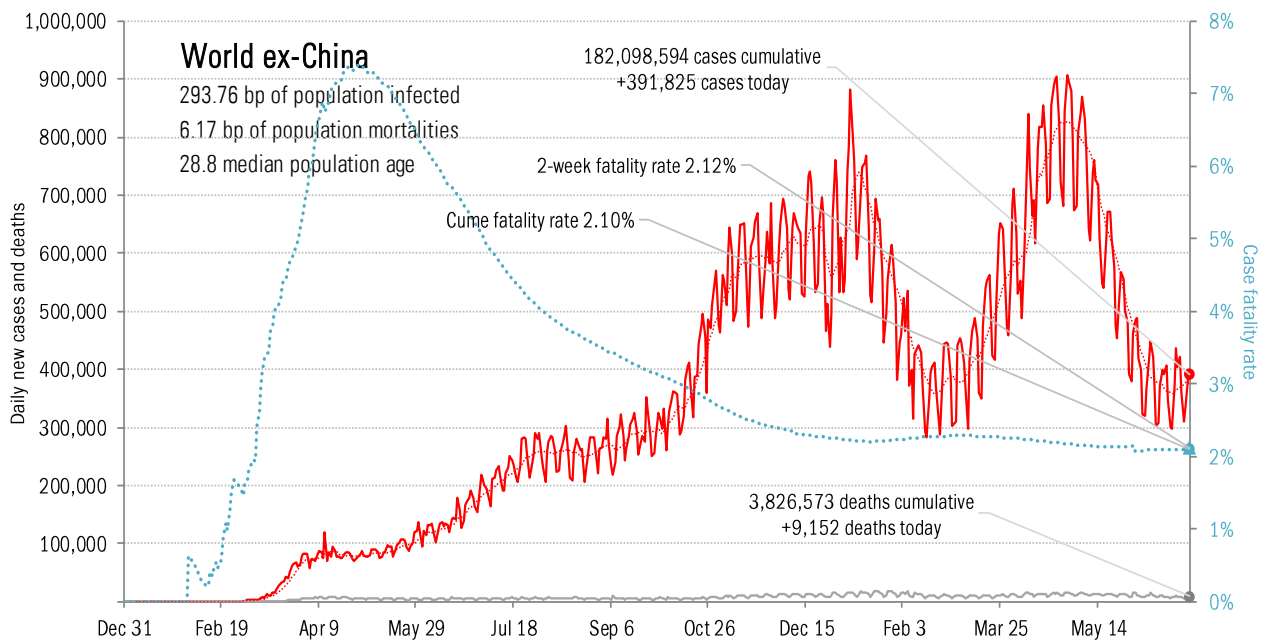
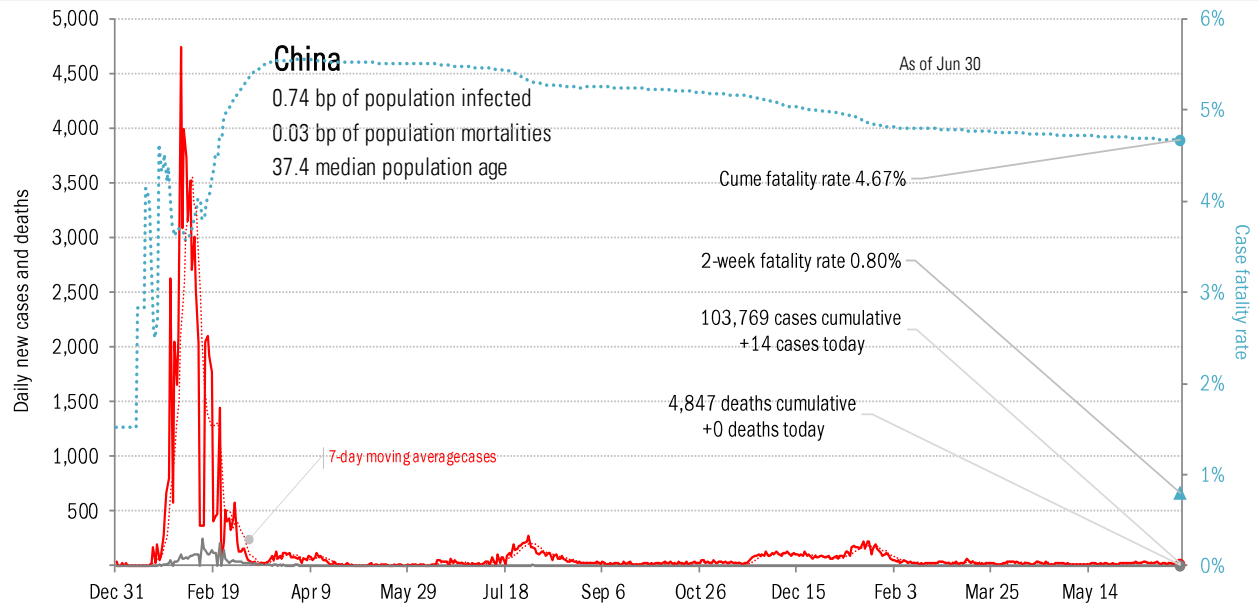
Source: [Johns Hopkins](#), TrendMacro calculations

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



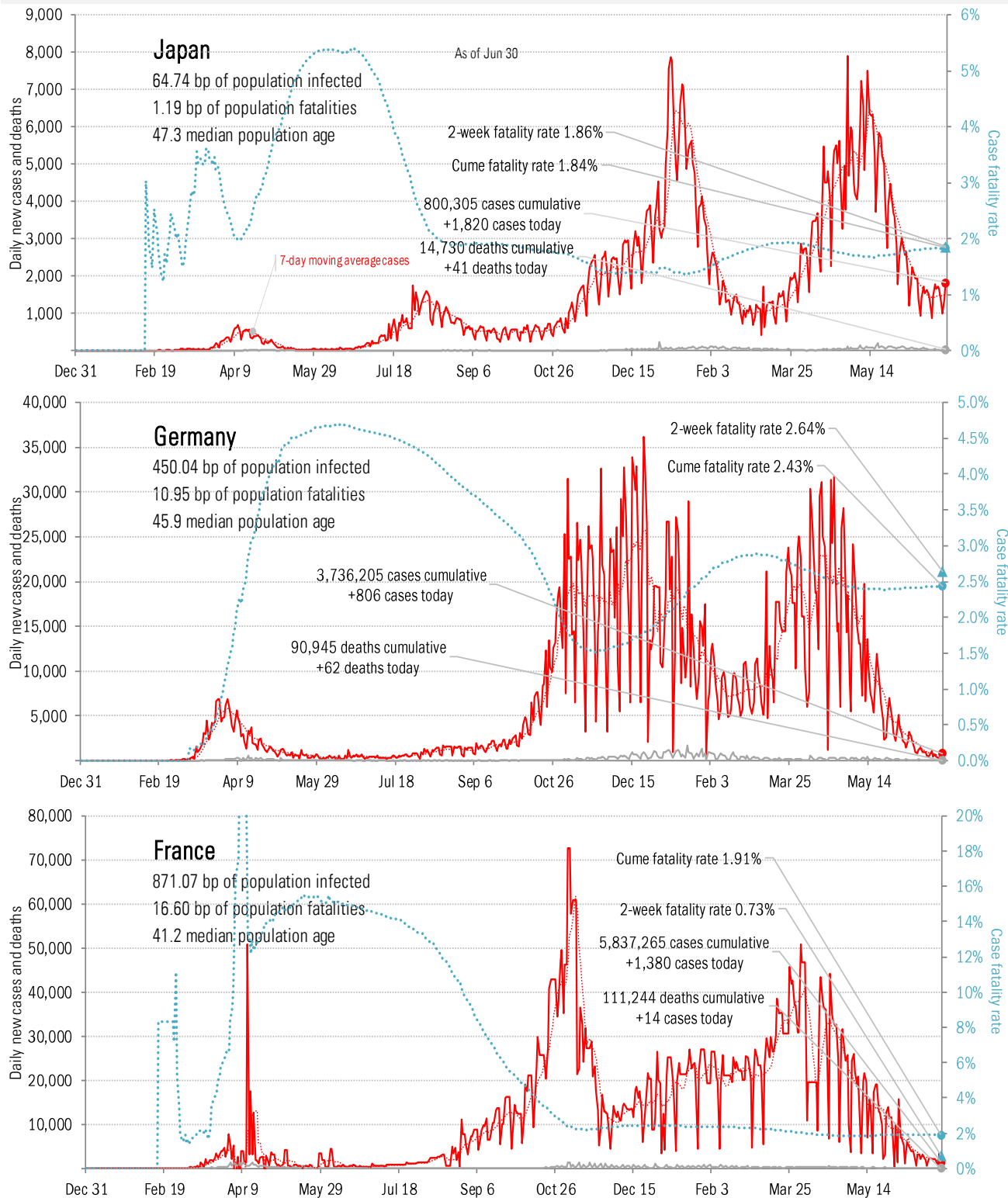
Source: [Johns Hopkins](#), TrendMacro calculations

Patient zero... and then everyone else



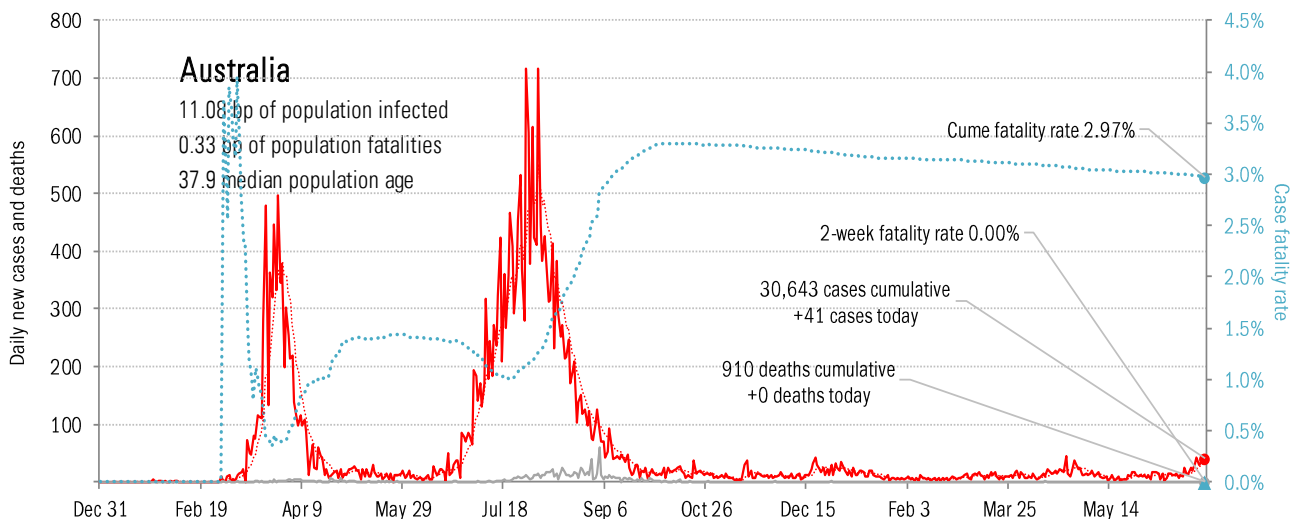
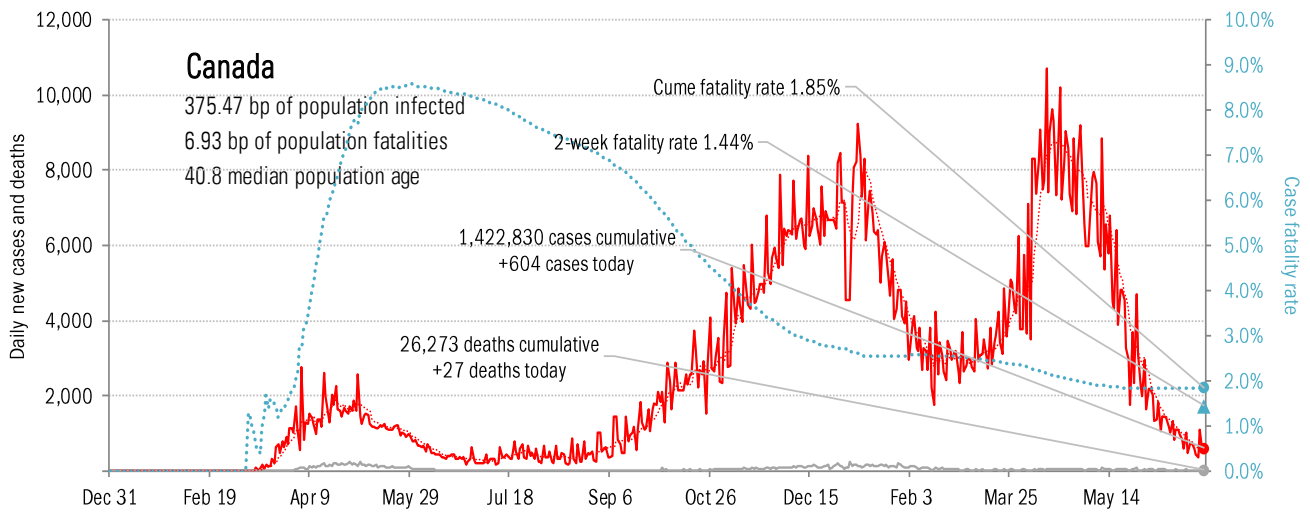
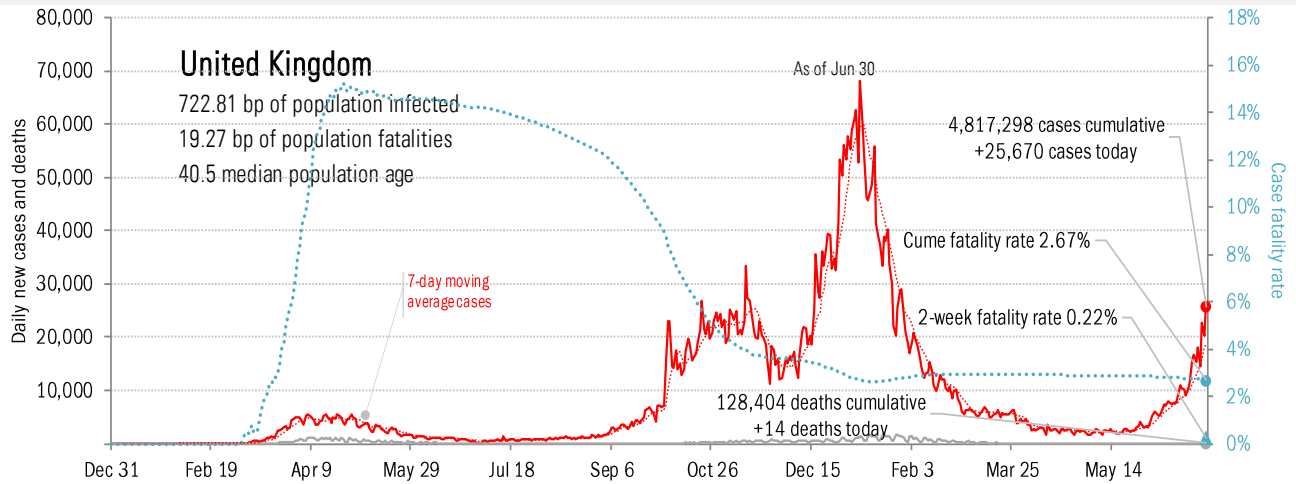
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the largest economies



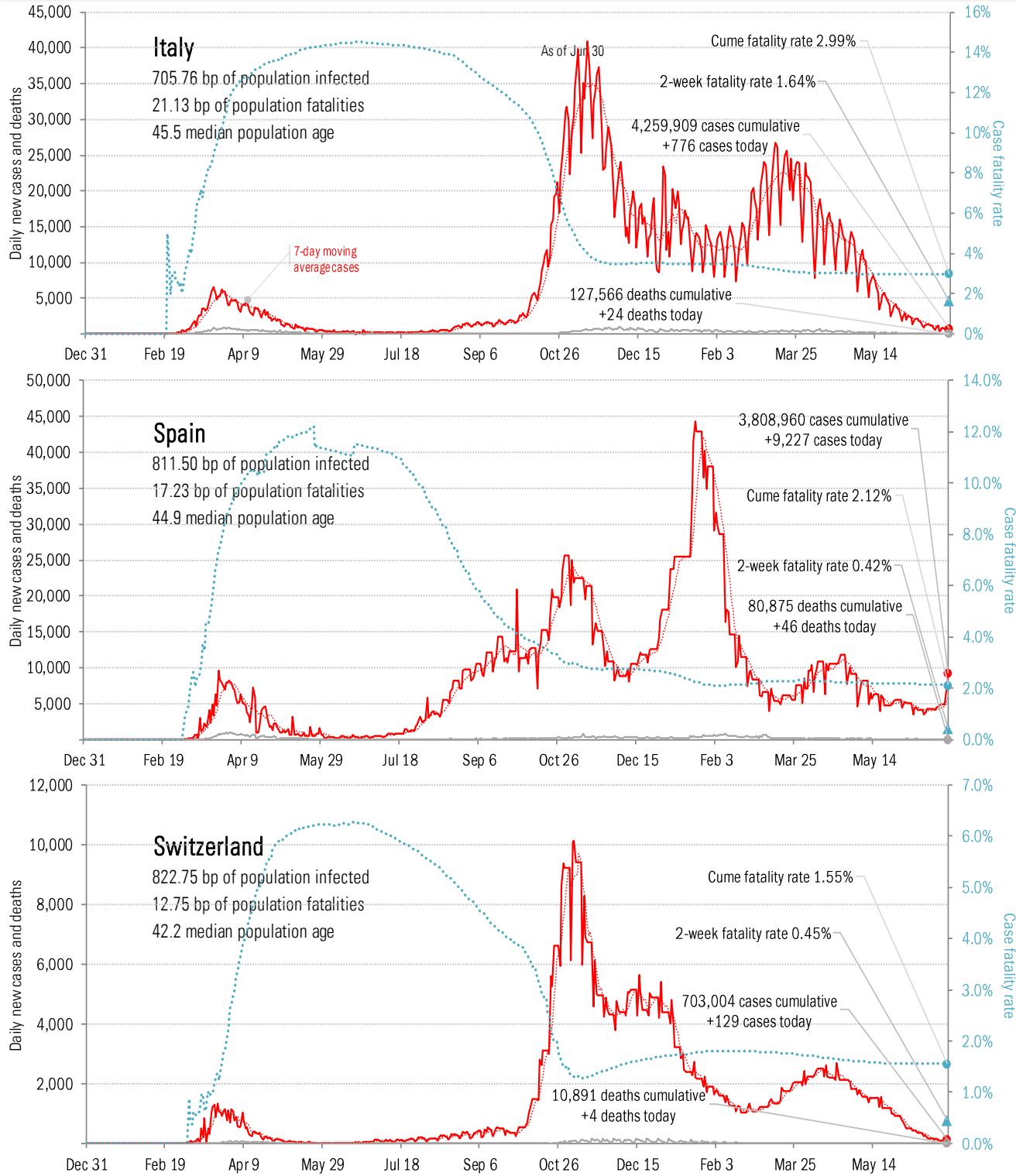
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in The Anglosphere



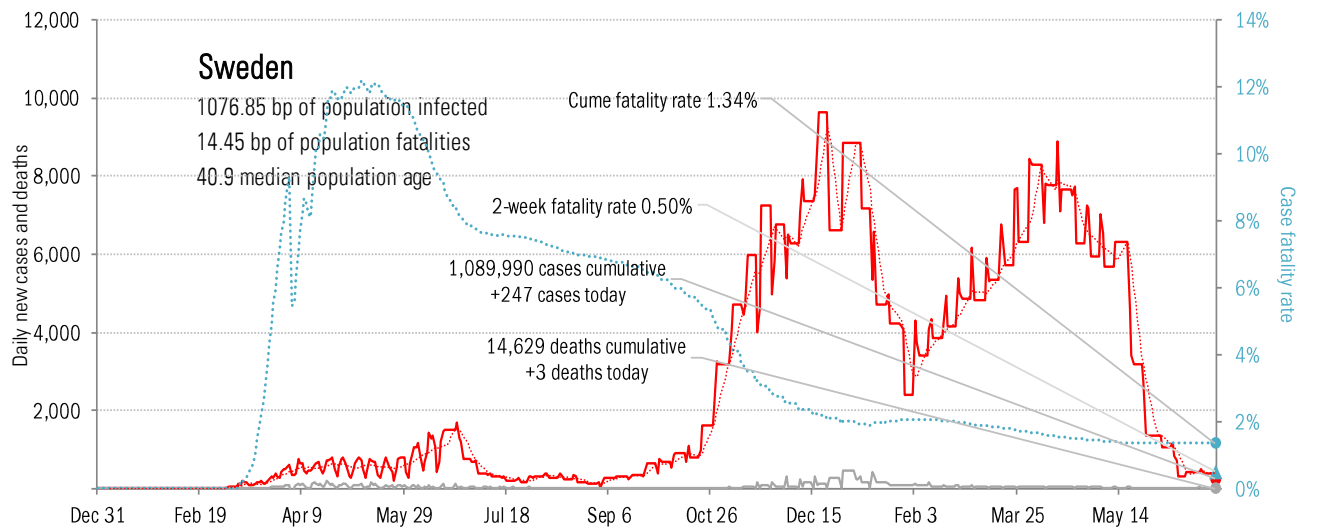
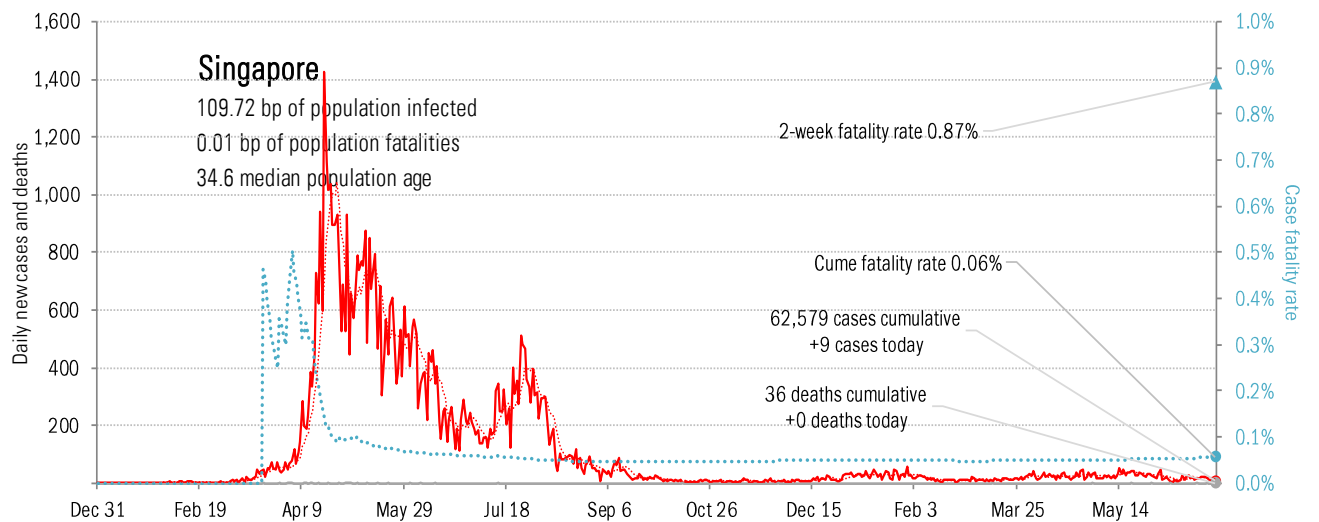
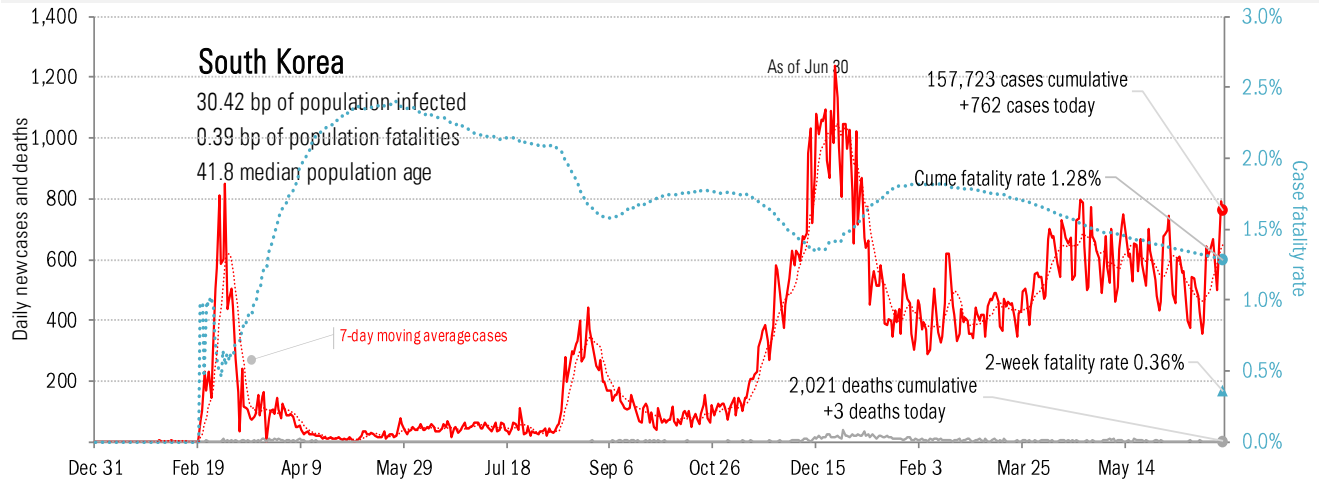
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in continental Europe



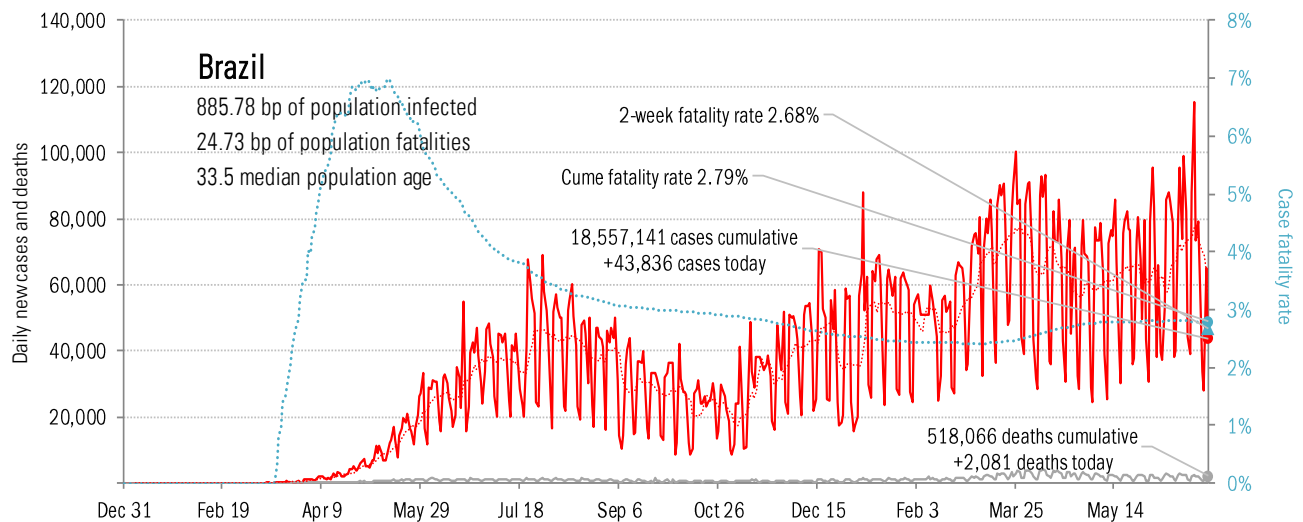
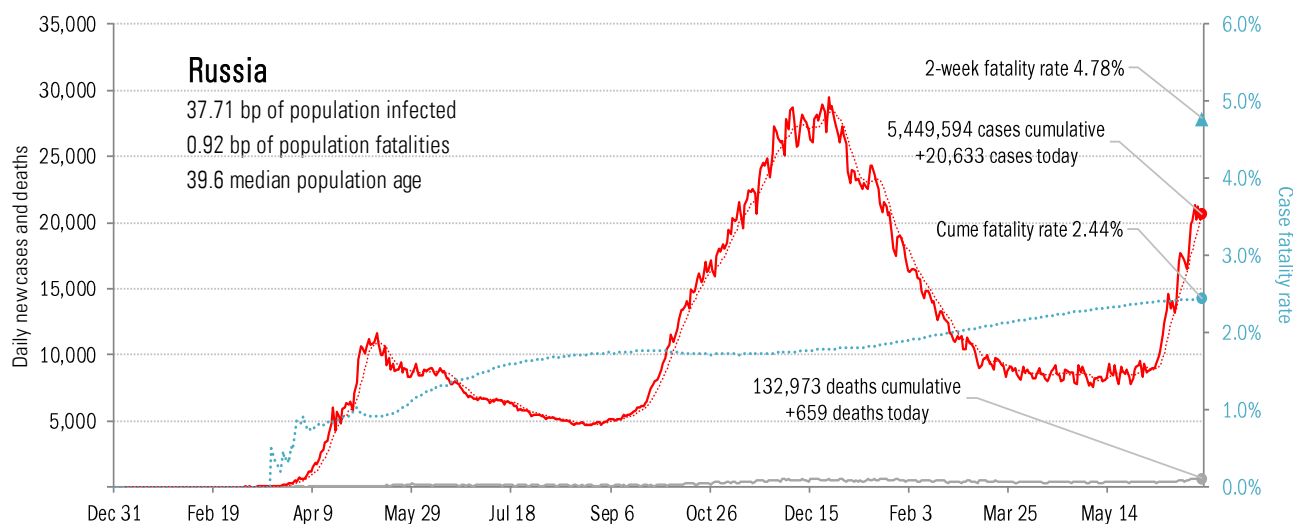
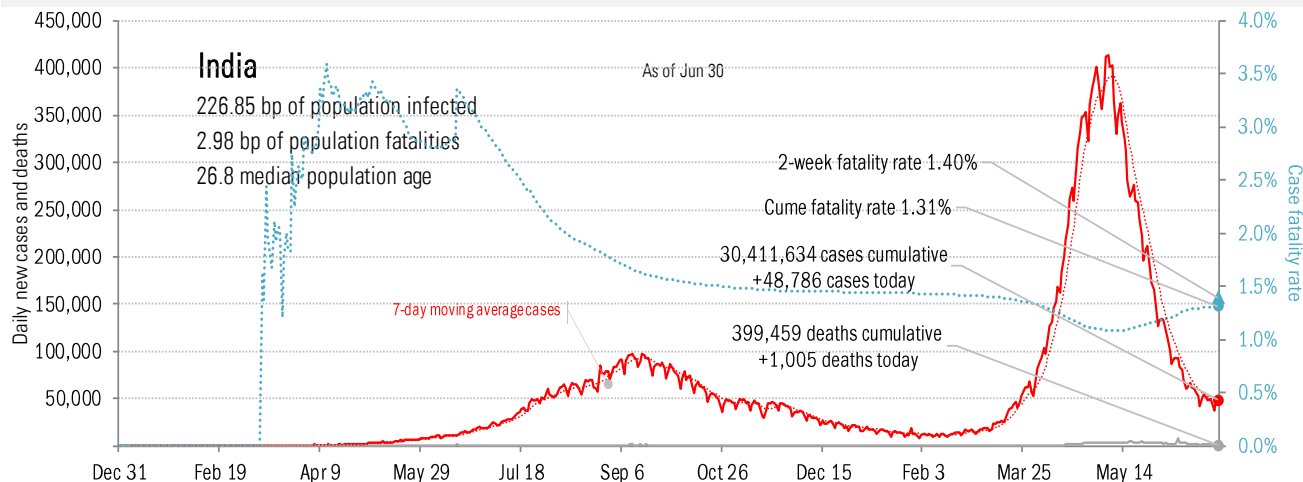
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in other hot-spots



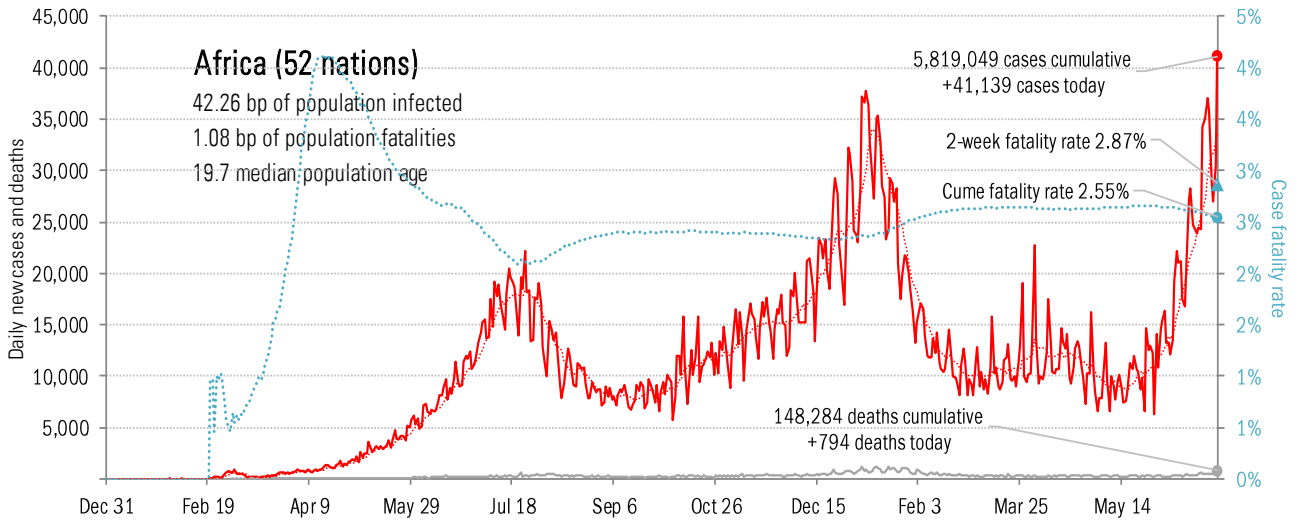
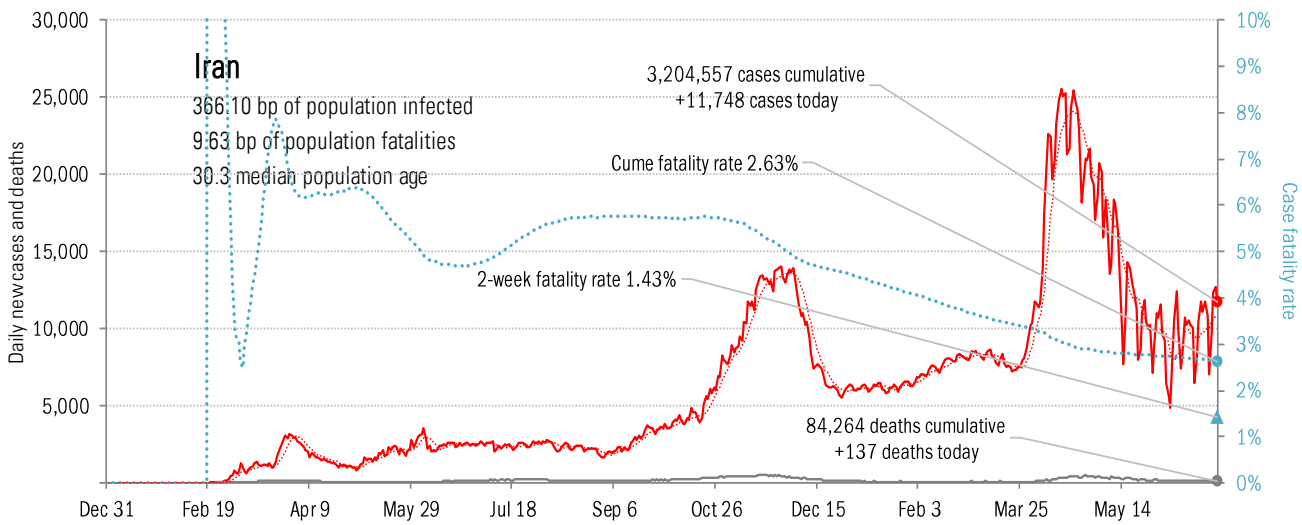
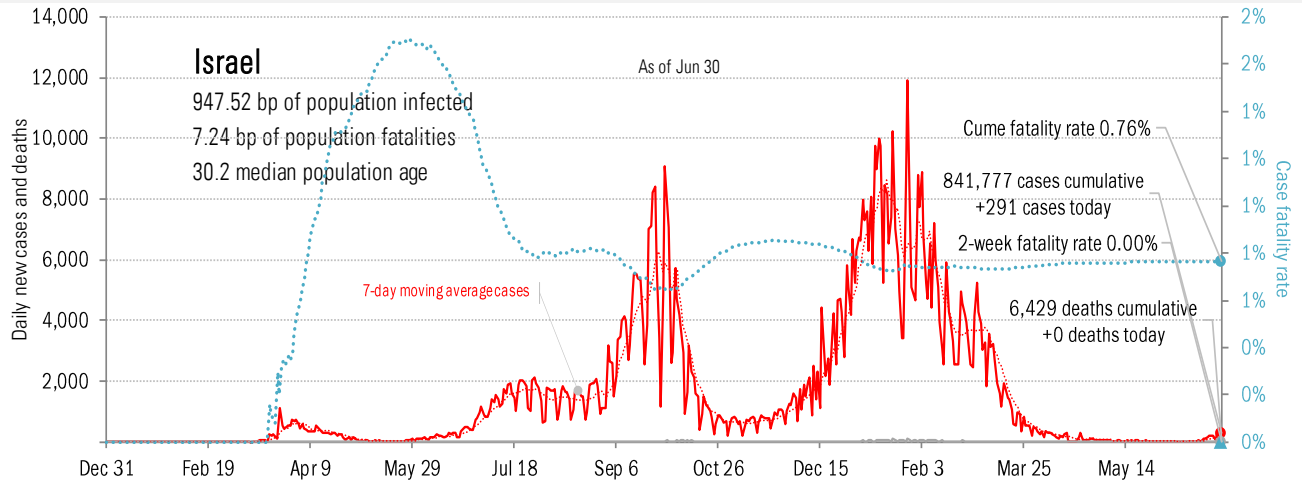
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the BRICs ex-China



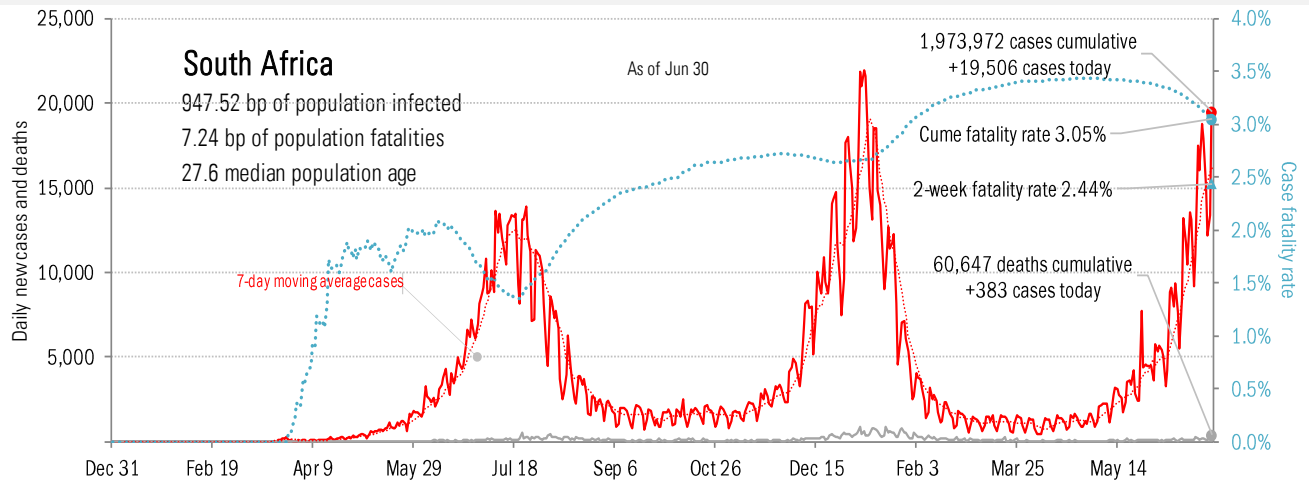
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the Middle East and Africa



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

Impact in Africa, continued



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