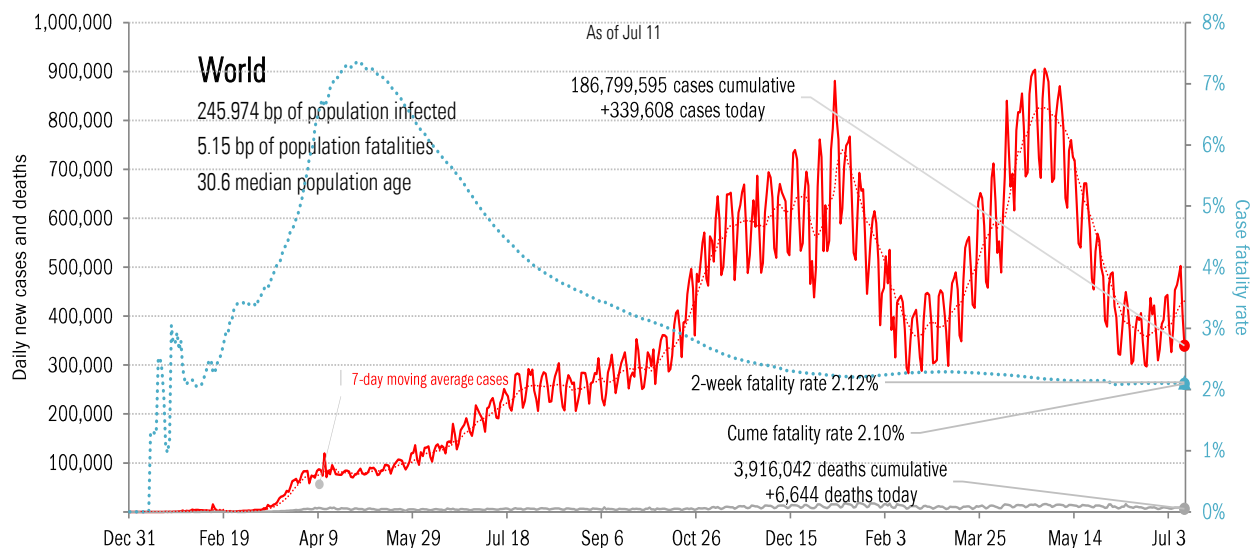
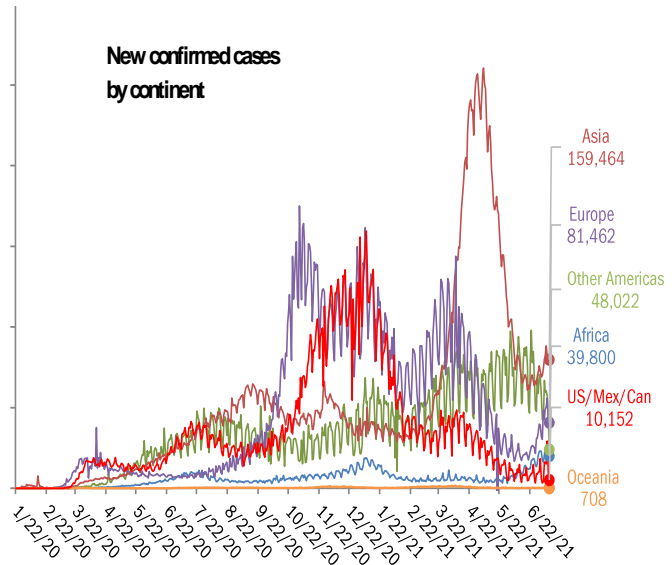


Data Insights: Covid-2019 Monitor

Monday, July 12, 2021

The global scorecard

The worst ten countries			
New cases		New Deaths	
India	+37,154	Peru	+1,157
Indonesia	+36,197	Indonesia	+1,007
United Kingdom	+31,382	Russia	+739
Russia	+24,544	India	+724
Brazil	+20,937	Brazil	+595
Iran	+17,664	Argentina	+280
South Africa	+16,302	Bangladesh	+230
Bangladesh	+11,874	Iran	+165
Thailand	+9,539	South Africa	+151
Netherlands	+9,328	Tunisia	+144
+214,921		+5,192	
World	+339,608	World	+6,644
Top ten	63%	Top ten	78%



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

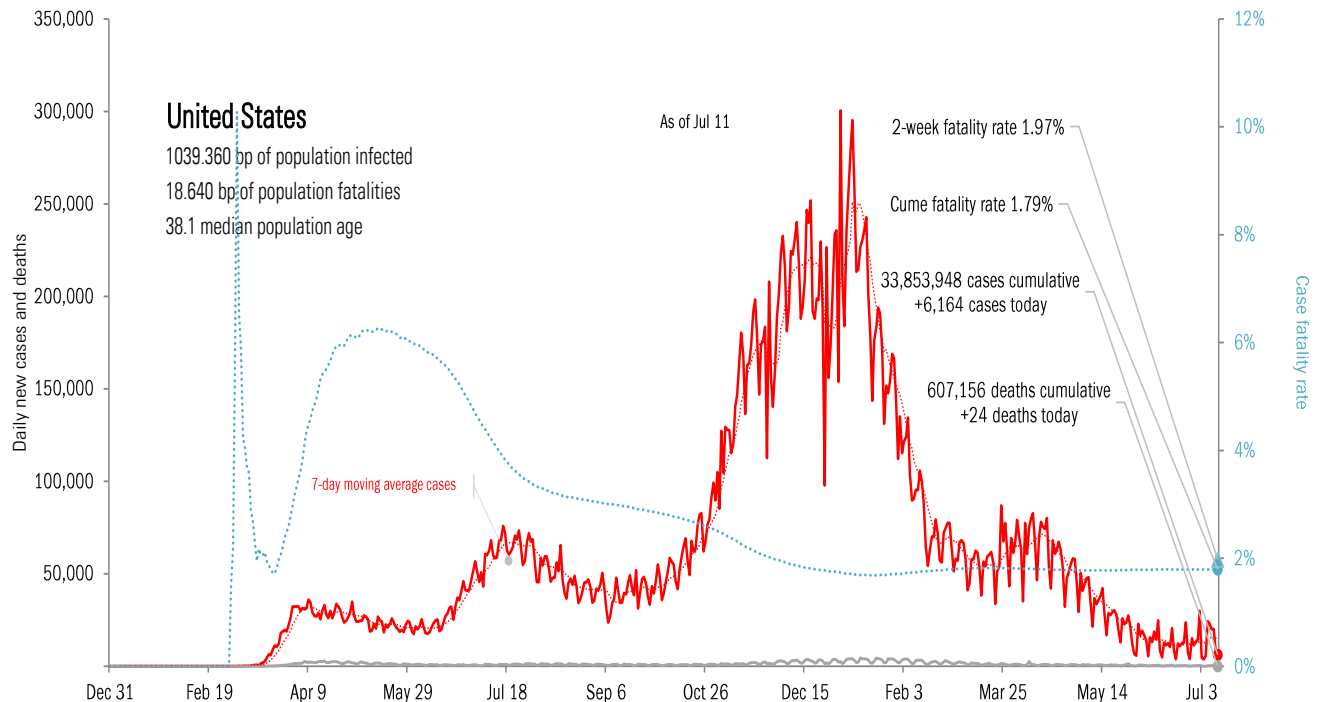
The ten worst US states

New cases			New Deaths			New in hospital			Cumulative cases			Cumulative deaths			Cumulative in hospital			Hospital use		ICU use	
FL	+3,392		FL	+24		FL	+186		CA	3,835,469		CA	63,932		TX	257,212		RI	86%	MO	23%
CA	+1,401		CO	+5		TX	+69		TX	3,017,321		NY	53,735		CA	242,568		MA	85%	AR	17%
MO	+1,095		TX	+5		GA	+58		FL	2,399,080		TX	52,629		FL	191,728		MD	83%	UT	16%
AZ	+803		AZ	+4		CA	+51		NY	2,120,486		FL	38,112		NY	137,112		MO	83%	NV	15%
NY	+794		NJ	+4		AR	+37		IL	1,395,497		PA	27,746		GA	110,516		PA	82%	TX	10%
TX	+430		PA	+3		MS	+26		PA	1,218,631		NJ	26,505		PA	92,146		DC	80%	WY	10%
CO	+362		NY	+2		IL	+25		GA	1,139,396		IL	25,730		CH	88,387		GA	80%	FL	10%
NJ	+283		PR	+1		LA	+23		CH	1,114,267		GA	21,486		IL	83,152		MN	79%	OK	9%
VA	+240		AK	+0		NV	+19		NJ	1,026,071		MI	21,059		KY	78,941		NV	79%	ID	9%
CH	+231		AL	+0		CH	+17		NC	1,017,435		CH	20,380		MI	73,531		FL	78%	MS	9%
+9,031			+48			+511			18,283,653			351,314			1,355,293						
All states	+9,556			+48			+650		All states	33,853,948			607,156			2,415,106		All states	70%		67%
Top ten	95%			100%			79%		Top ten	54%			58%			56%		Median	73%		5%

Some states not reporting

Five most improved US states

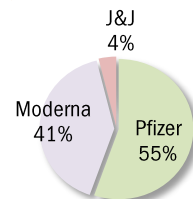
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
TX	-941	CA	-57	NY	-24	FR	+30 bp
CA	-607	AZ	-16	MO	-23	CA	+20 bp
AL	-534	TX	-13	AZ	-17	AK	+10 bp
MO	-502	CO	-6	OR	-13	AL	+10 bp
CO	-127	MO	-5	WY	-12	AR	+10 bp



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	399,615,115	+0.021 million	US	47.6%	55.1%
Doses administered	343,971,068	+0.599 million	UK	51.2%	67.6%
Administered	One dose	% Pop	Immune	% pop	New immune today
Total population	188,862,926	57%	163,493,557	49%	+0.319 million
Age 12 to 17	9,385,152	37%	7,306,959	29%	+0.062 million
Age 18 to 64	129,098,322	63%	111,315,332	55%	+0.223 million
Age 65 and over	50,155,689	92%	44,742,695	82%	+0.034 million
			France	36.1%	52.3%
			Spain	44.9%	58.9%
			Germany	42.3%	58.0%
			Italy	38.1%	59.3%
			Australia	9.0%	26.6%
			Israel	60.0%	66.2%
			Canada	43.2%	69.4%
			Japan	17.9%	29.7%
			Africa	1.3%	2.9%
			India	5.3%	22.0%
			Brazil	14.4%	40.8%



AK
61.5%
50.4%
44.5%

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

Best
Middle
Worst

At today's dosing pace,
every American >18 immune in
229 days
by Feb 25, 2022
60.4% of population >18 immunized
11.5% previously tested positive
72.0% vs 60% adult herd immunity*

Global data differs from sources, timing

China NA	ME
	73.6%
	67.1%
	62.4%
VT	NH
78.9%	72.7%
74.5%	63.4%
66.4%	57.2%

WA	ID	MT	ND	MN	IL	MI		NY	MA	
65.8%	50.5%	55.7%	50.0%	61.5%	62.0%	61.9%		65.8%	74.5%	
62.4%	40.1%	48.3%	44.4%	57.6%	60.3%	52.0%		61.1%	71.2%	
55.9%	36.6%	43.5%	39.4%	52.7%	47.1%	47.9%		55.3%	62.6%	
OR	NV	WY	SD	IA	IN	OH	PA	NJ	CT	RI
71.1%	54.1%	47.9%	58.3%	58.6%	53.5%	56.4%	66.1%	69.4%	70.6%	75.1%
59.4%	50.9%	40.3%	51.1%	51.9%	45.8%	48.7%	63.7%	63.9%	67.9%	65.4%
54.7%	42.9%	35.7%	46.0%	48.7%	43.1%	45.5%	50.7%	56.4%	61.7%	59.9%
CA	UT	CO	NE	MO	KY	WV	VA	MD	DE	
66.2%	53.8%	64.6%	57.4%	53.1%	53.7%	56.6%	64.7%	74.6%	70.0%	
62.6%	49.5%	58.7%	52.1%	45.9%	50.2%	45.6%	59.9%	62.8%	59.0%	
51.1%	38.1%	52.9%	48.2%	39.7%	44.4%	38.7%	52.9%	57.2%	51.1%	
	AZ	NM	KS	AR	TN	NC	SC	DC		
	59.6%	60.5%	56.6%	50.6%	49.8%	59.5%	55.2%	79.8%		
	51.3%	63.8%	49.9%	43.0%	42.9%	49.4%	45.0%	62.2%		
	44.0%	55.7%	42.6%	34.9%	38.0%	42.6%	39.5%	53.4%		
			OK	LA	MS	AL	GA			
			54.1%	46.8%	48.1%	52.7%	56.1%			
			45.6%	39.2%	37.1%	40.6%	44.0%			
			39.1%	35.8%	33.4%	33.3%	37.1%			
			TX					FL		PR
			58.9%					62.7%		69.3%
			49.1%					54.8%		66.4%
			42.2%	As of Jul 12				47.0%		57.6%

As of Jul 12

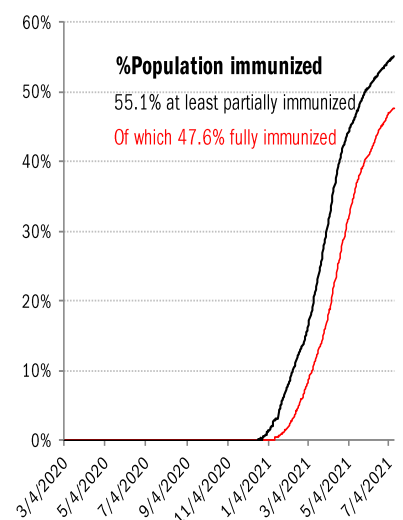
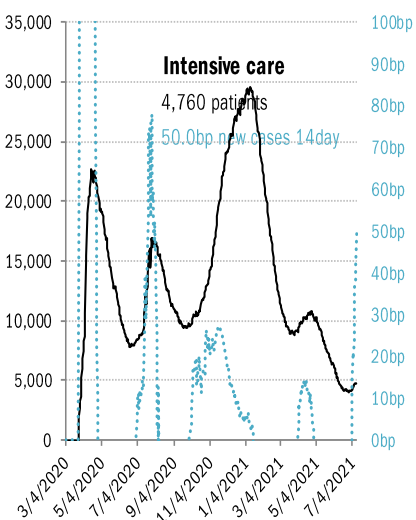
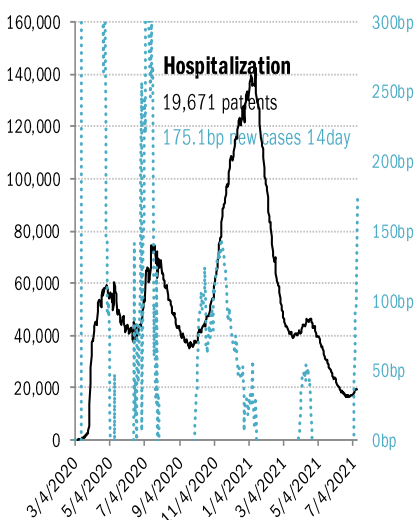
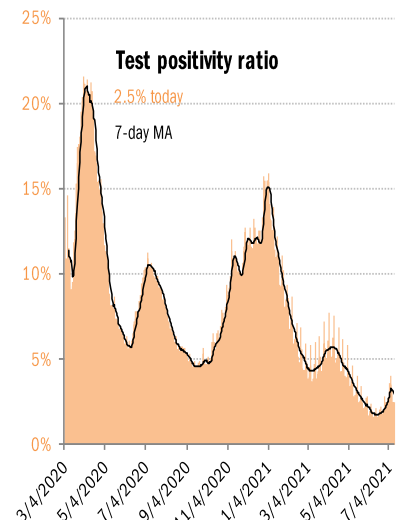
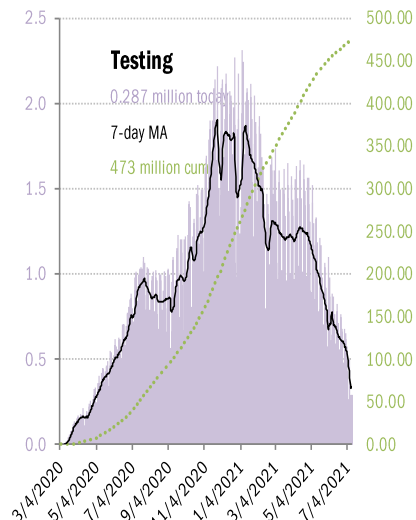
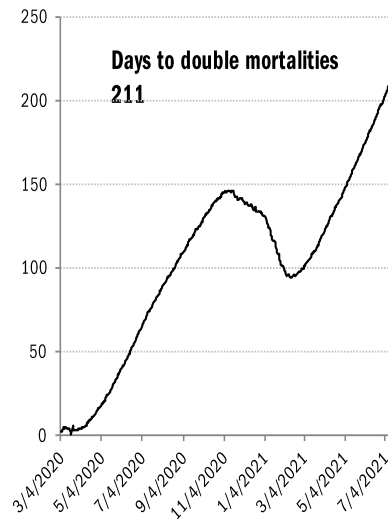
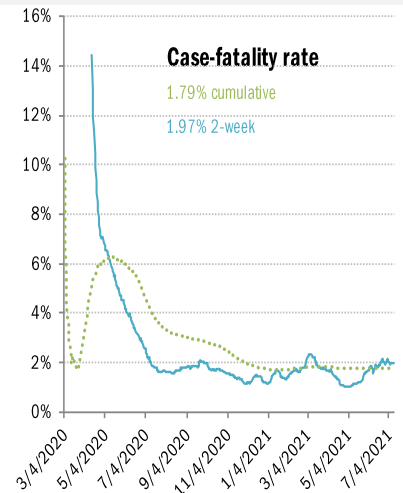
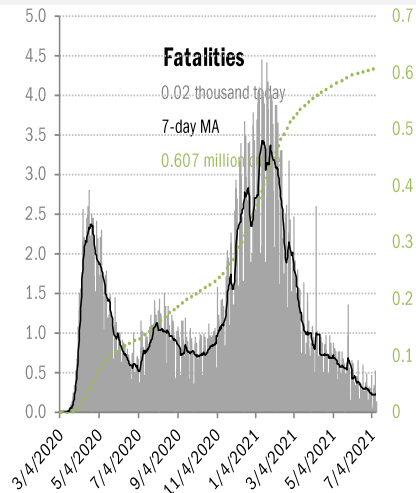
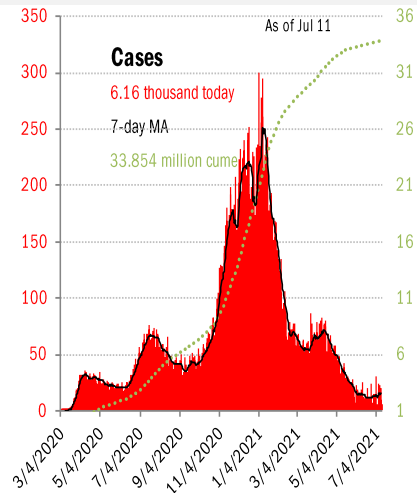
* Includes persons >18 fully immunized or previously tested positive, no overlap. Disregards untested positives, natural immunities.

** 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

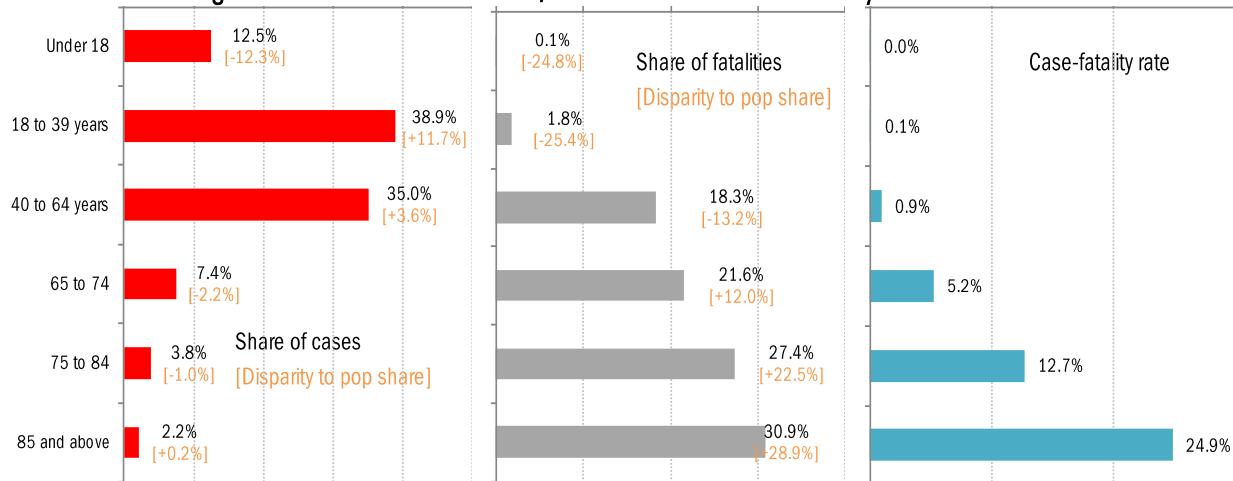
US deep-dive

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

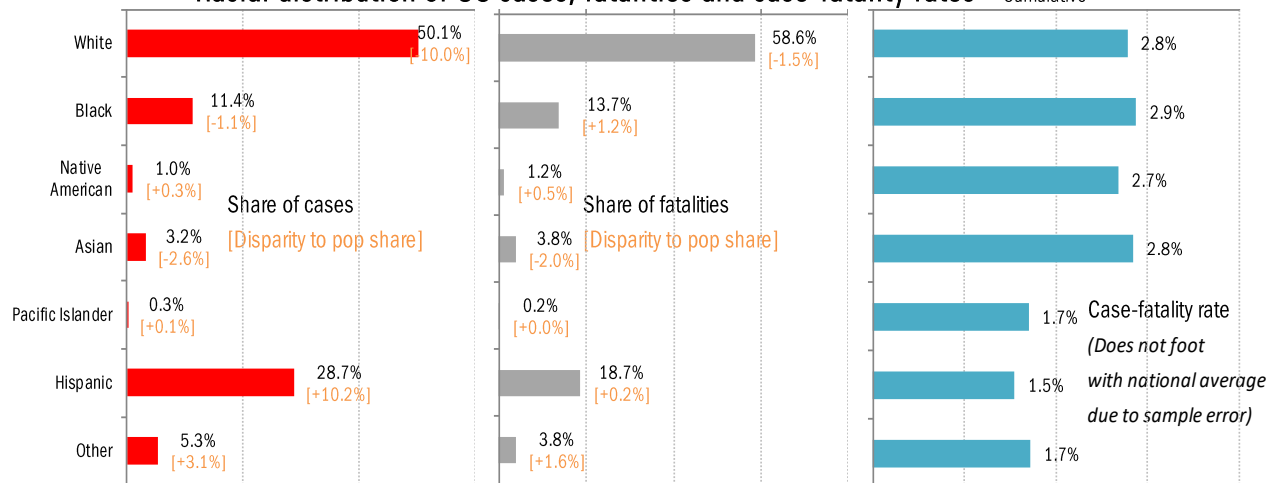


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations

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

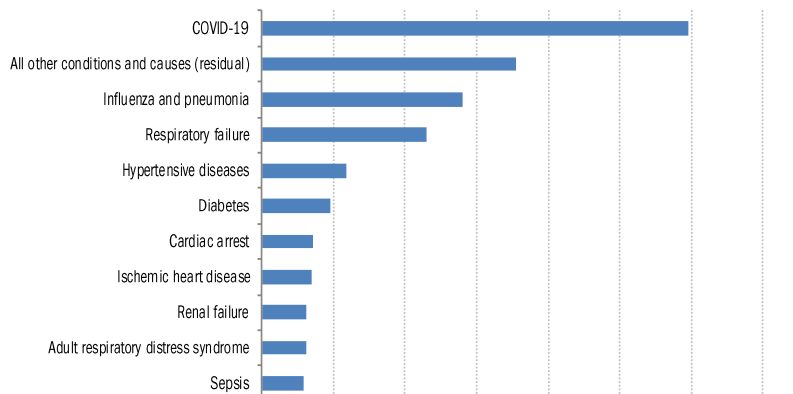


Racial distribution of US cases, fatalities and case-fatality rates



Comorbidities

Top-ten joint causes of Covid mortalities, cumulative



As of Jul 4

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

[The Origins of SARS-CoV-2: A Critical Review](#)

Edward C. Holmes et al.

Zenodo

July 7, 2021

[Fauci: 'Horrifying' to hear CPAC crowd cheering anti-vaccination remarks](#)

Olafimihan Oshin

The Hill

July 11, 2021

[A Group of Scientists Presses a Case Against the Lab Leak Theory of Covid](#)

Carl Zimmer and James Gorman

New York Times

July 9, 2021

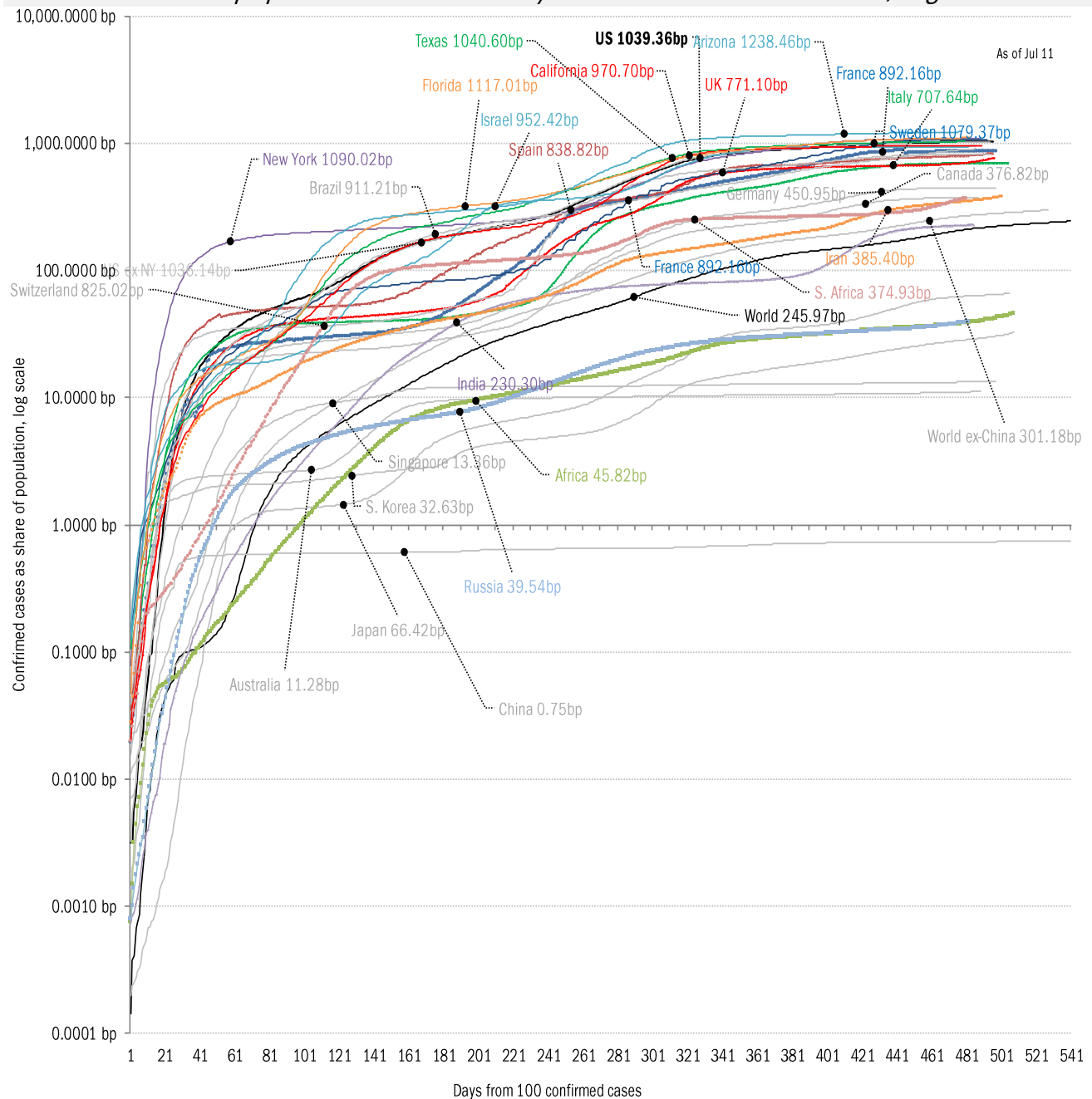
Meme of the day



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

The coronavirus case accelerometer... tracking the world's infection curves

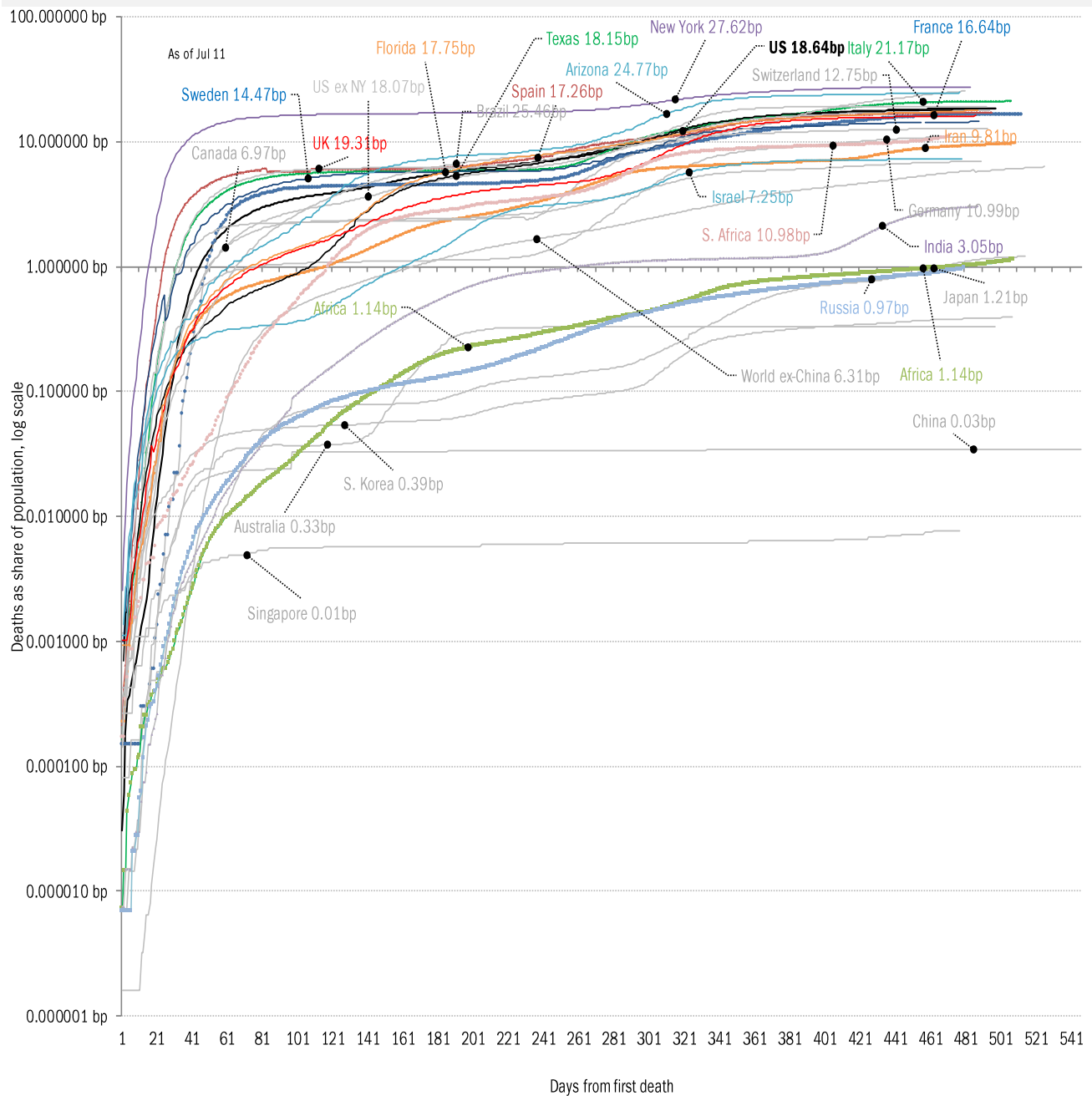
Share of infected population from first day with 100 confirmed cases, log scale



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

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

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

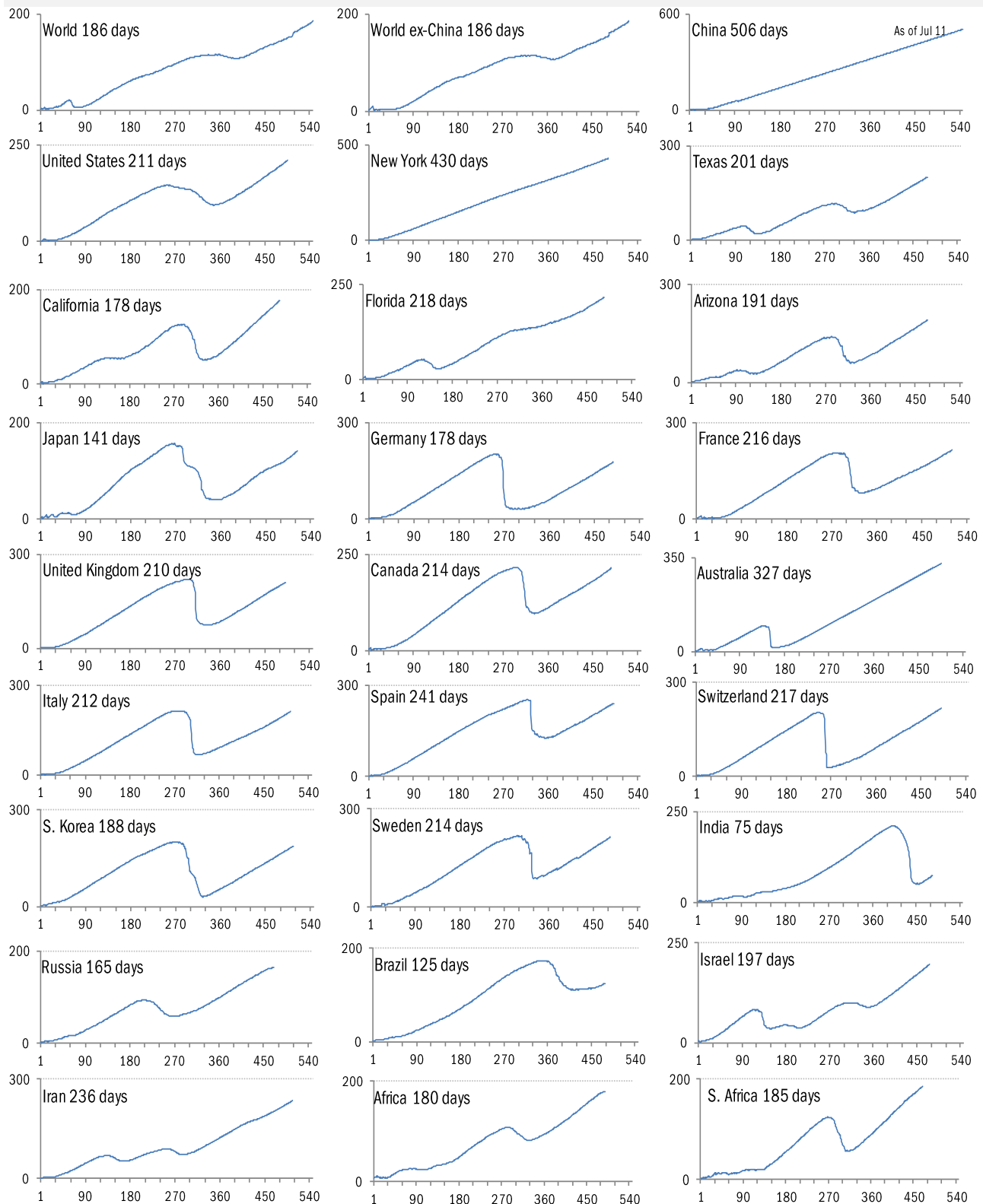


Source: [Johns Hopkins](#), TrendMacro calculations

"Exponential"? Our most reliable evidence of the rate of spread of Covid-19

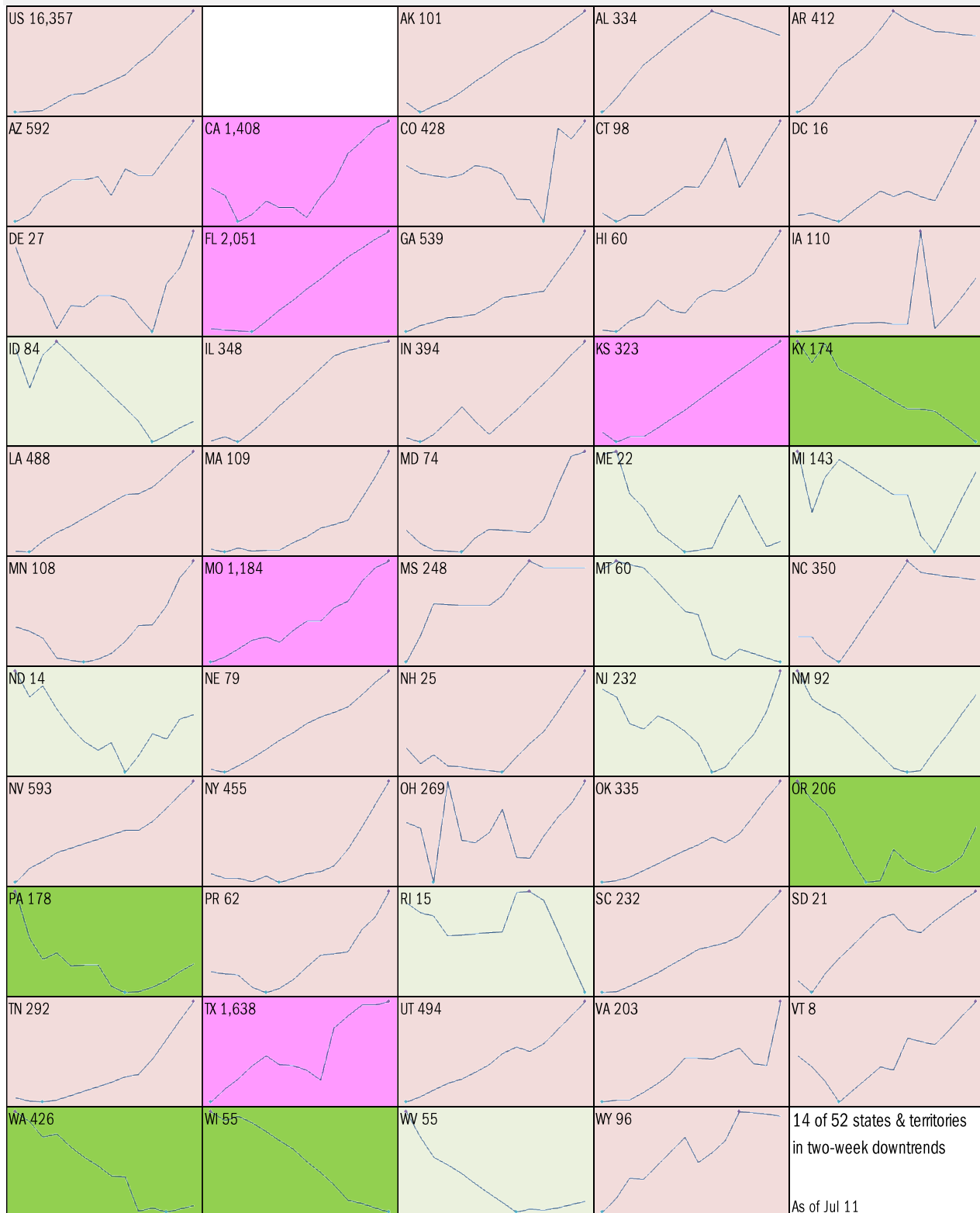
Vertical: days to double deaths Horizontal: days from first death

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



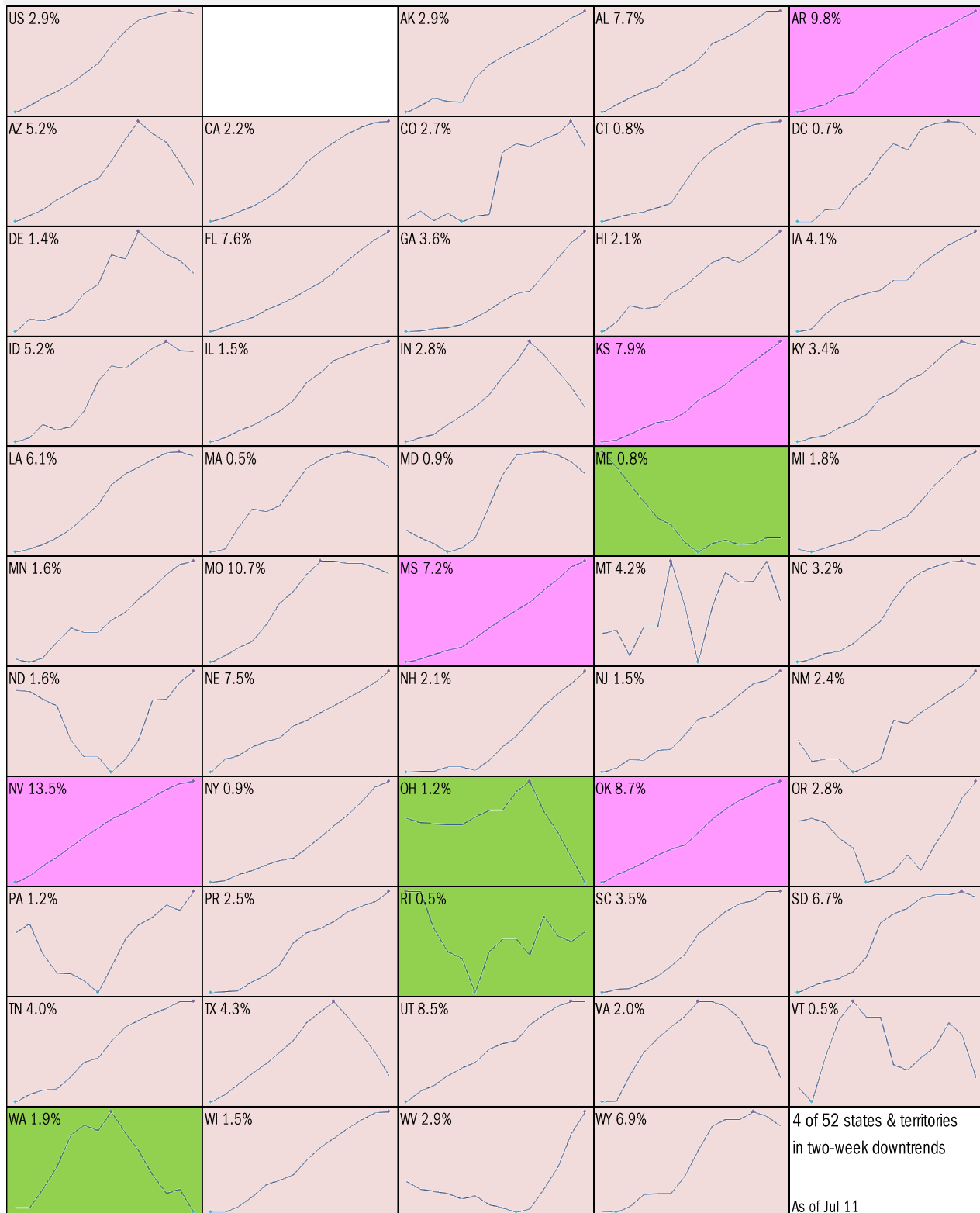
Source: [Johns Hopkins](#), TrendMacro calculations

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



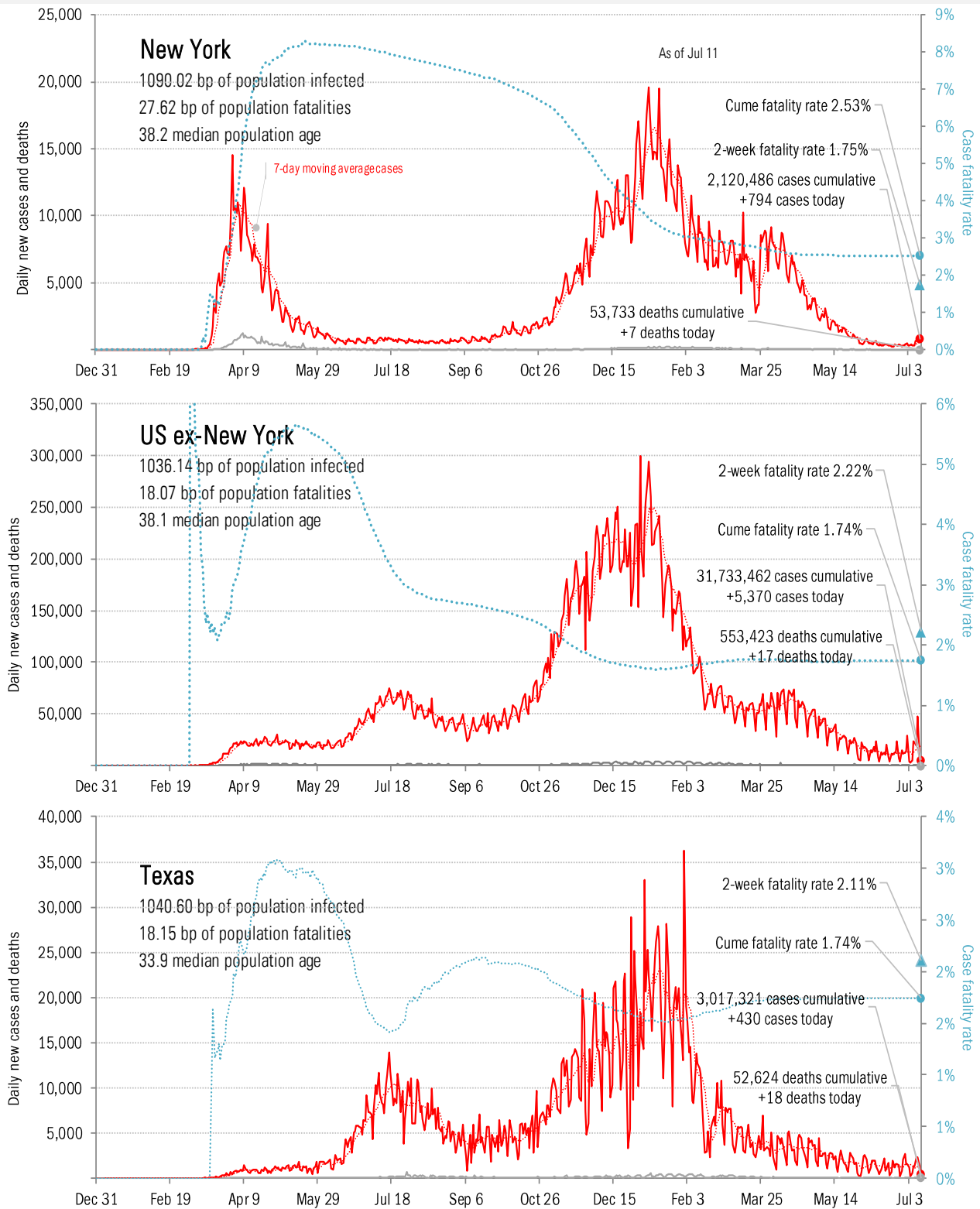
Source: [Johns Hopkins](#), TrendMacro calculations

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



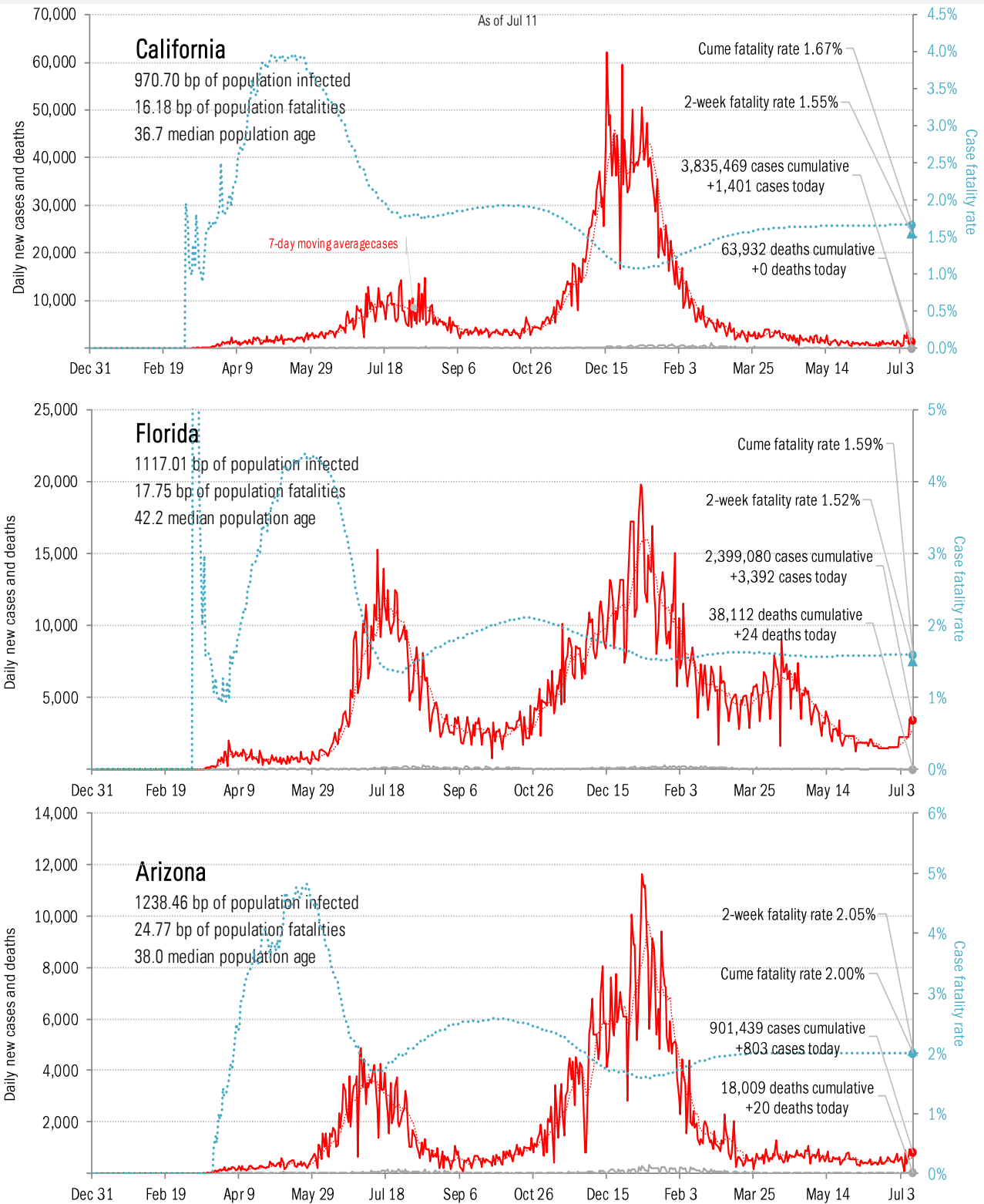
Source: [Covid Act Now](#), TrendMacro calculations

From Ground Zero to the Rio Grande



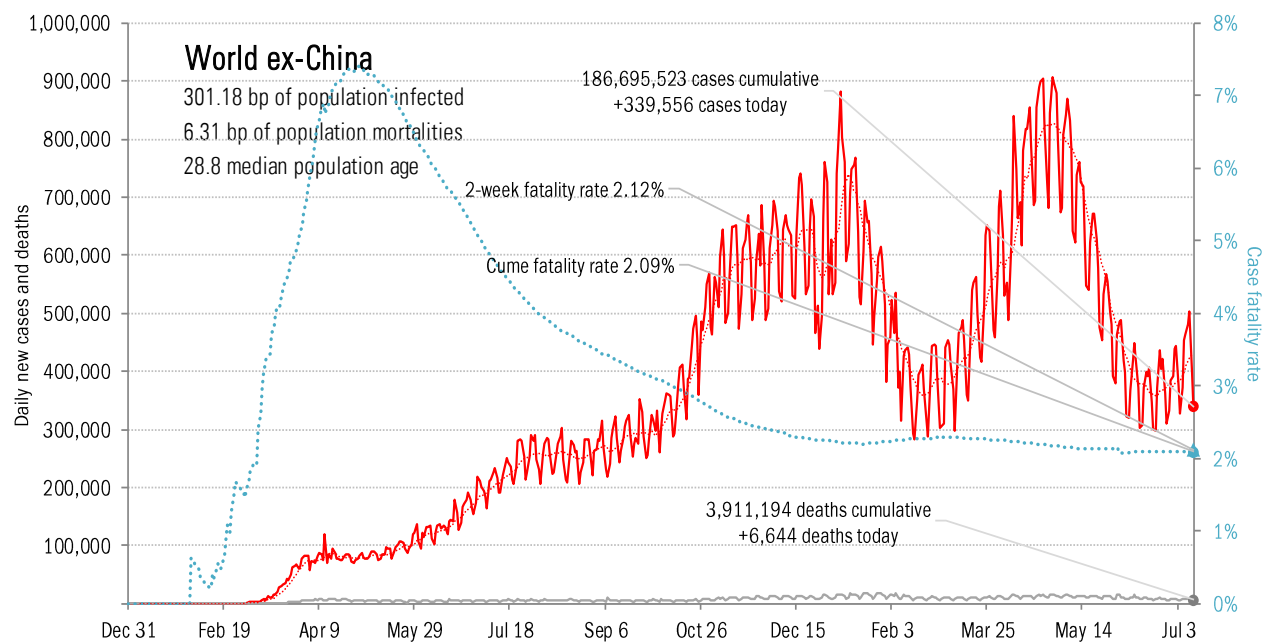
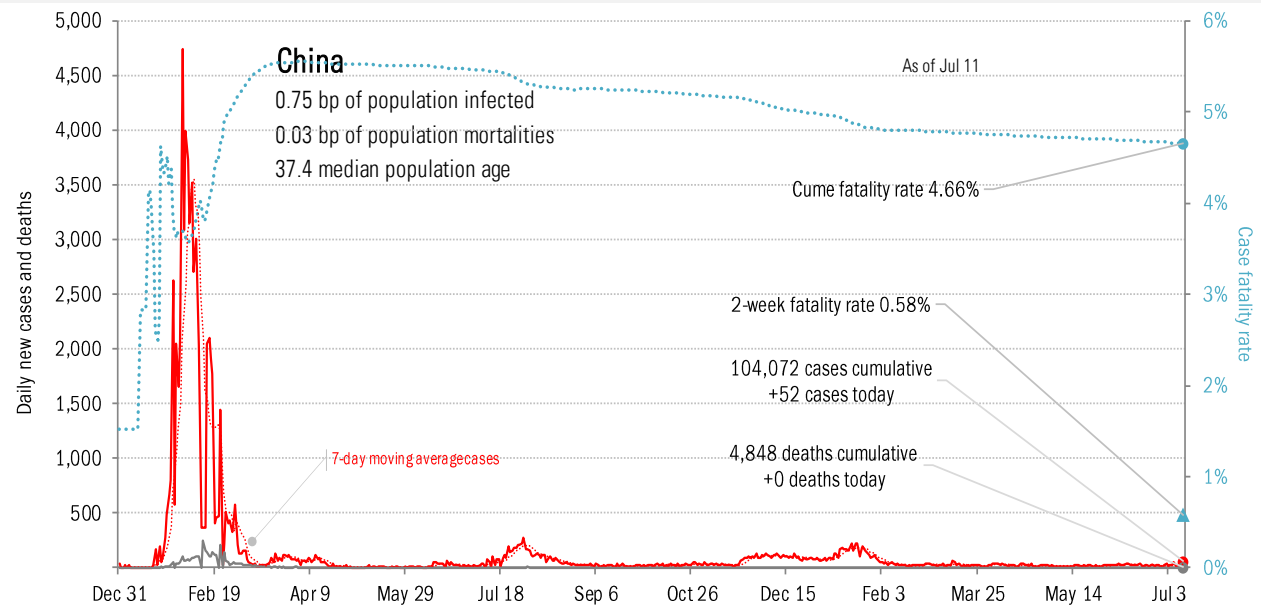
Source: [Johns Hopkins](#), TrendMacro calculations

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



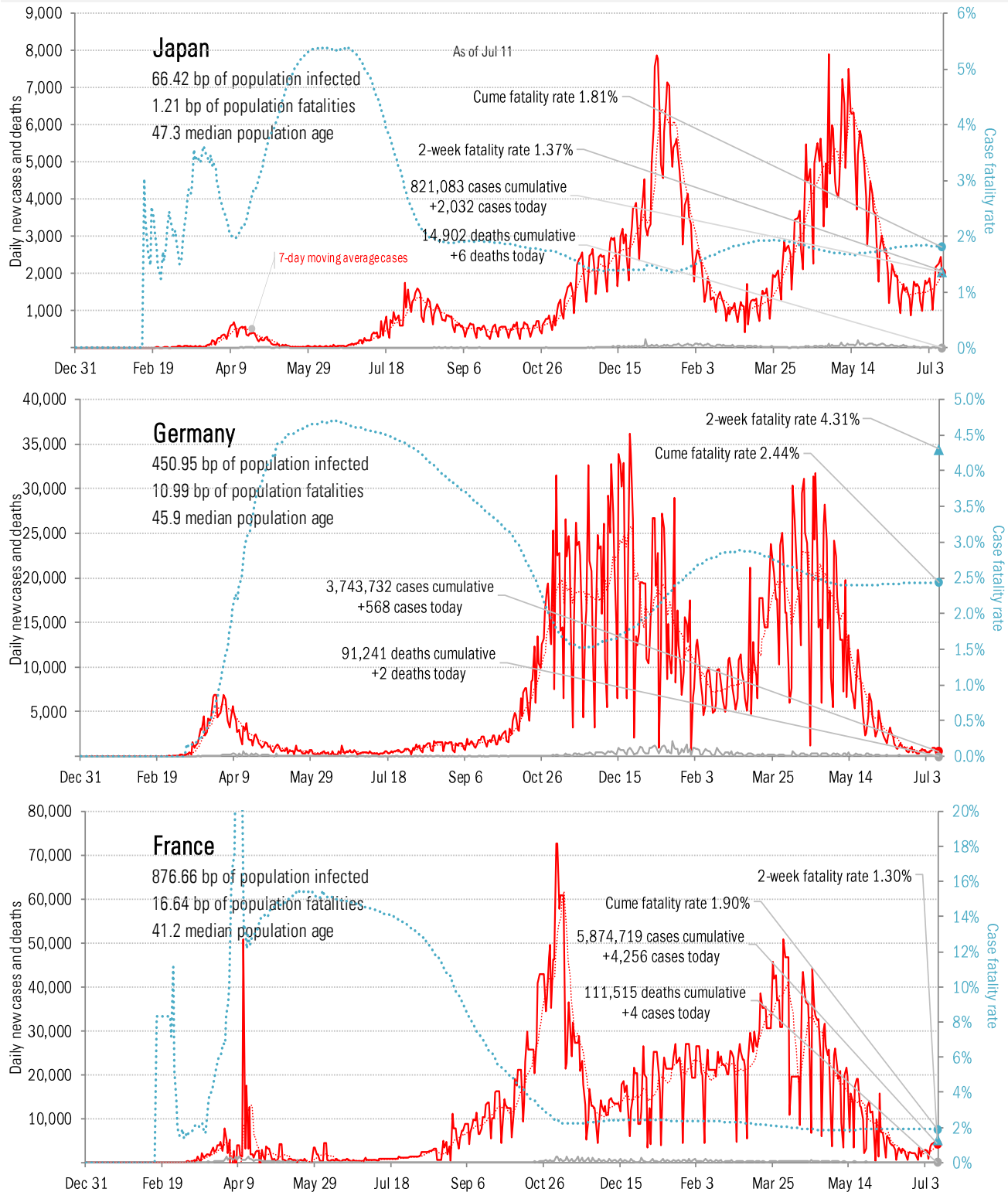
Source: [Johns Hopkins](#), TrendMacro calculations

Patient zero... and then everyone else



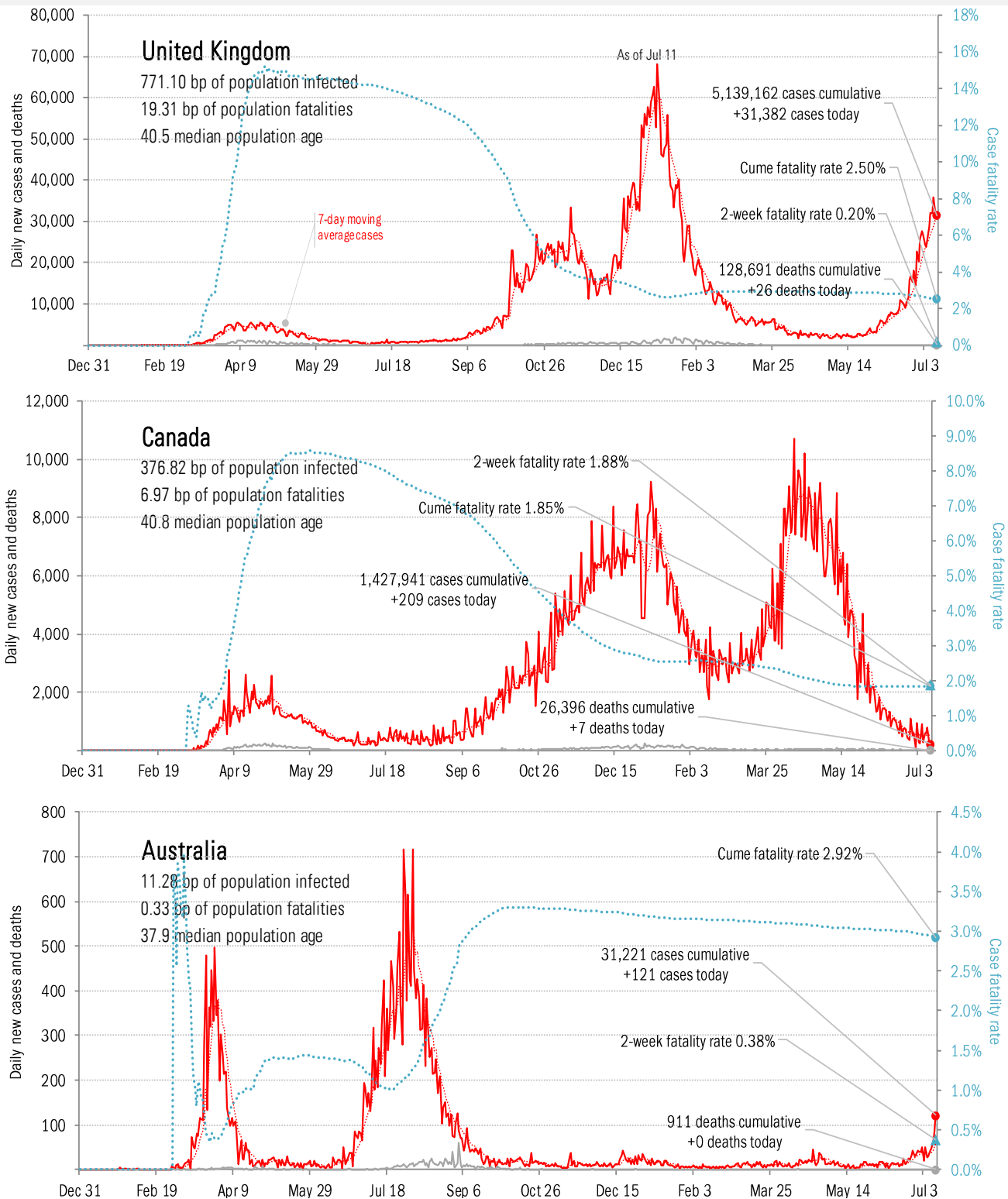
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the largest economies



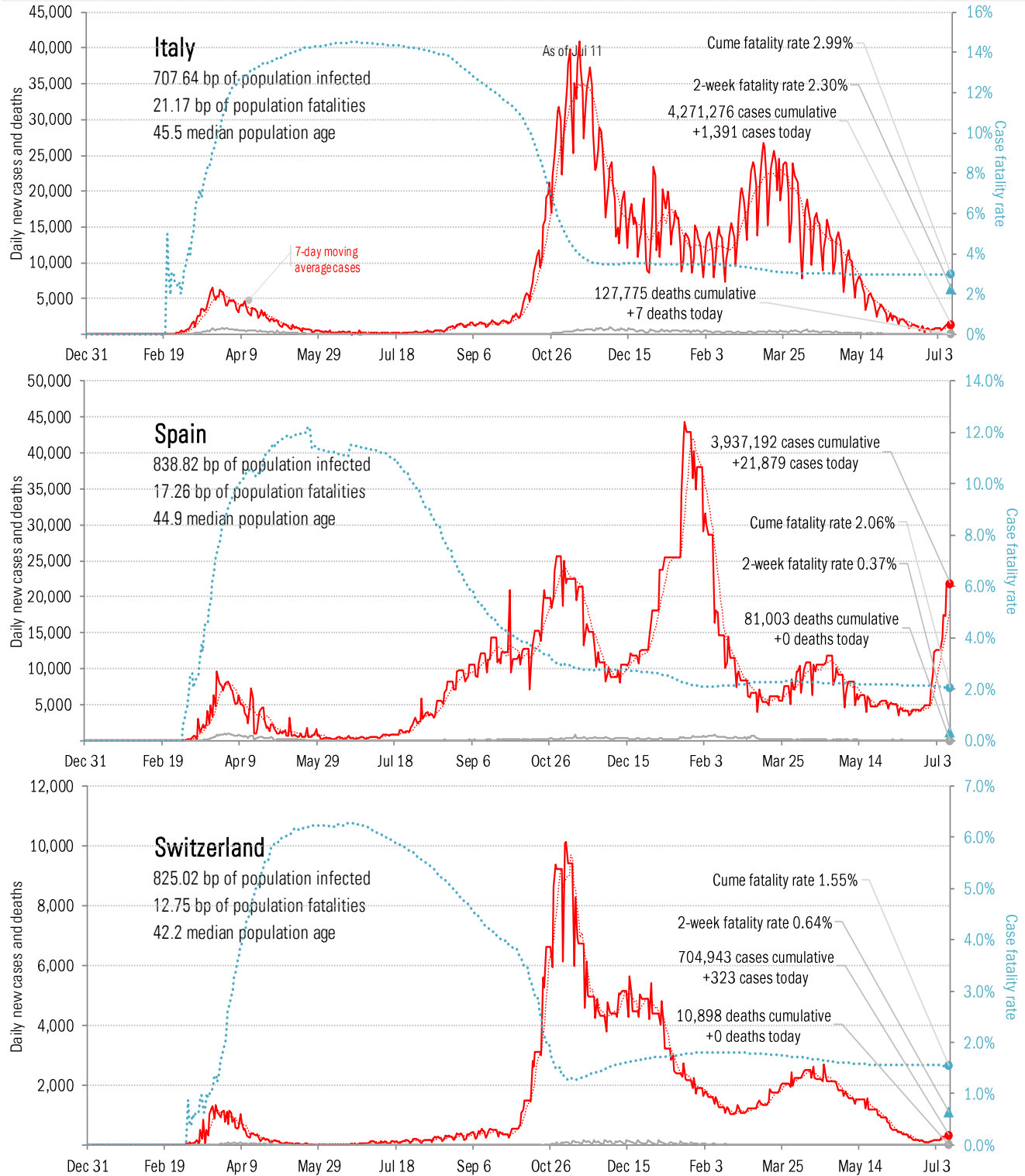
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in The Anglosphere



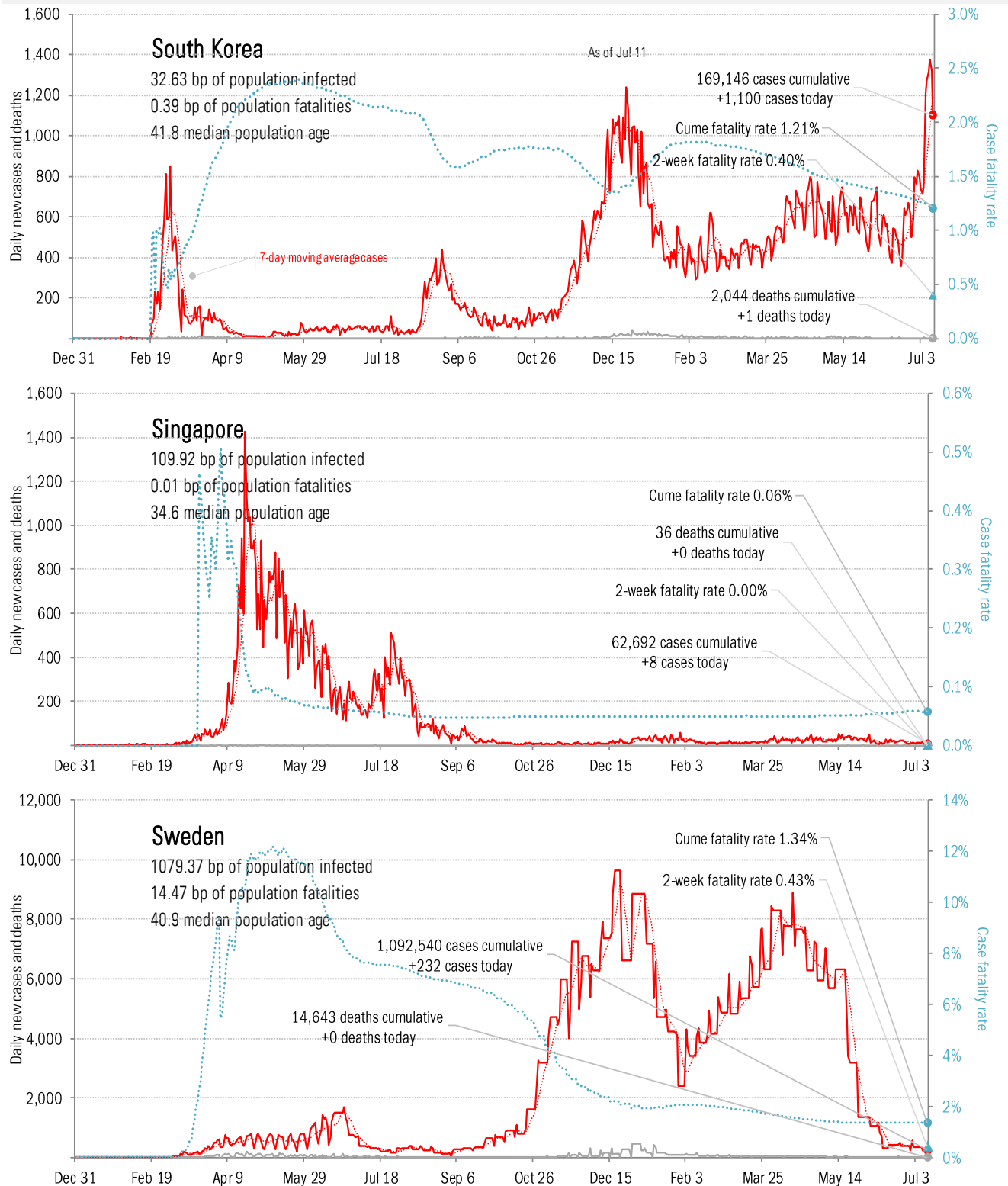
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in continental Europe



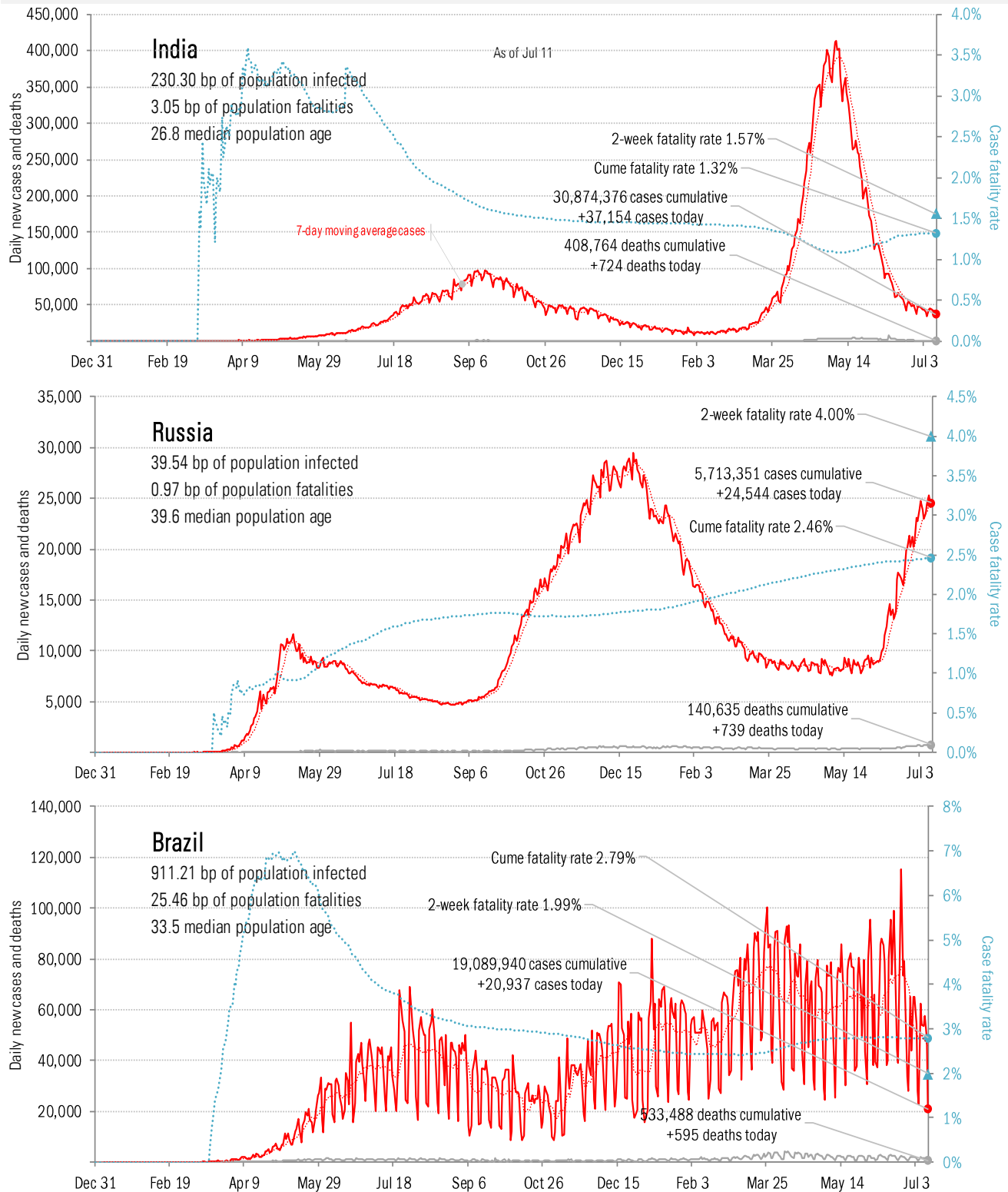
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in other hot-spots



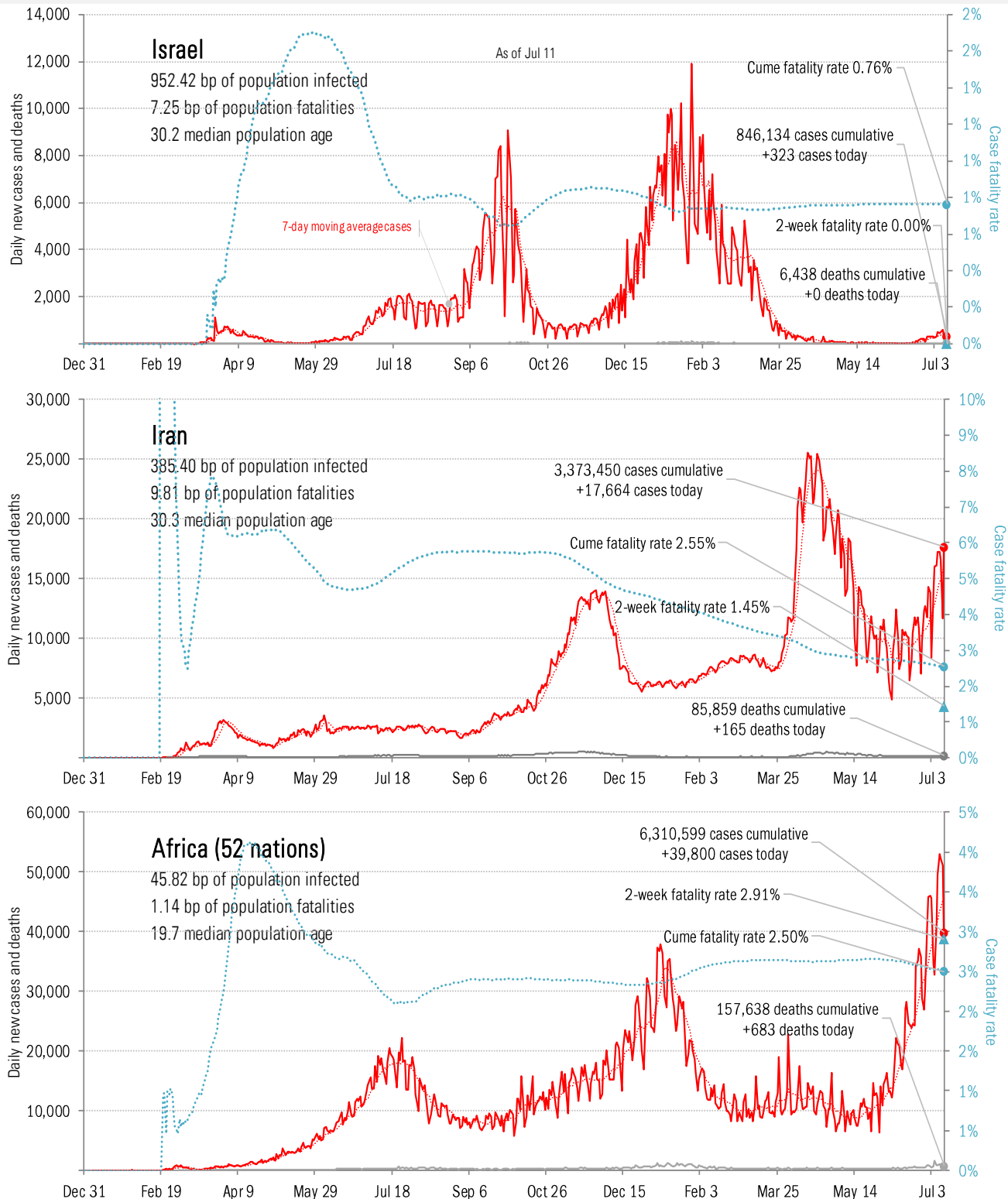
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the BRICs ex-China



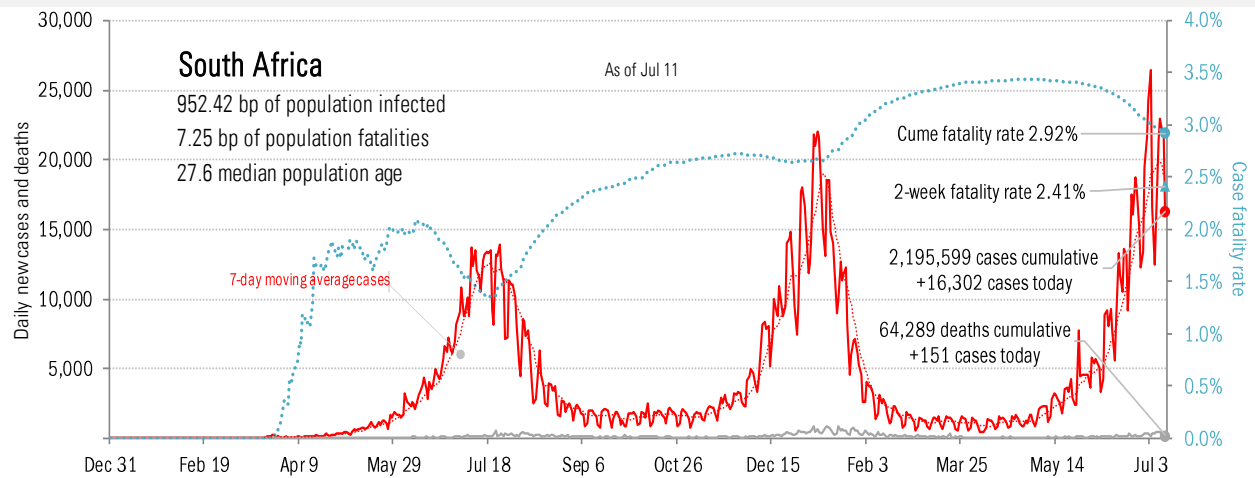
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the Middle East and Africa



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

Impact in Africa, continued



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