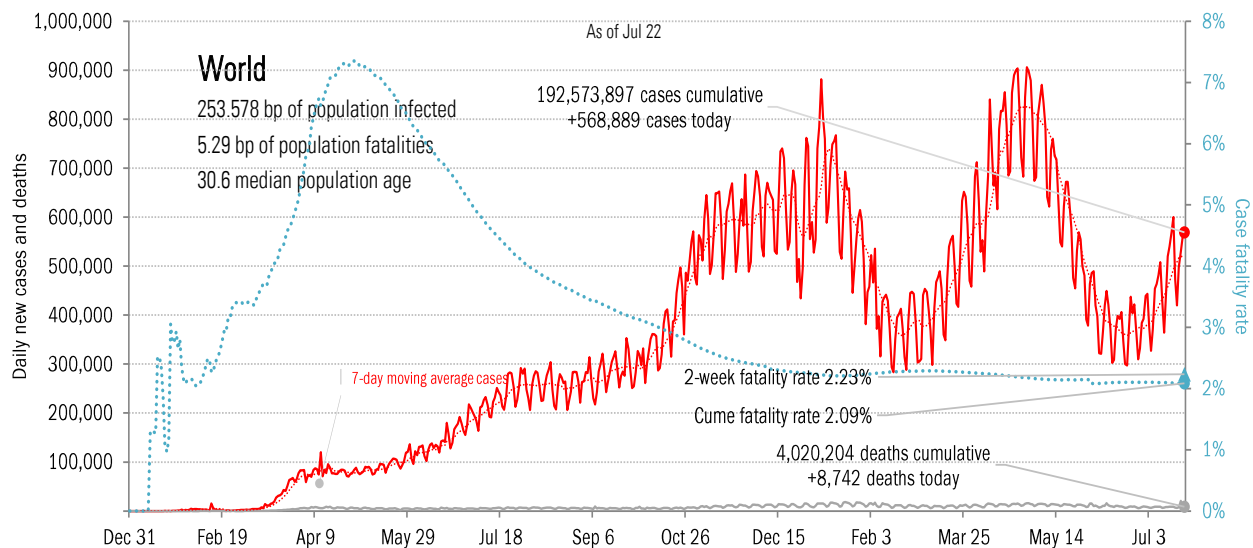
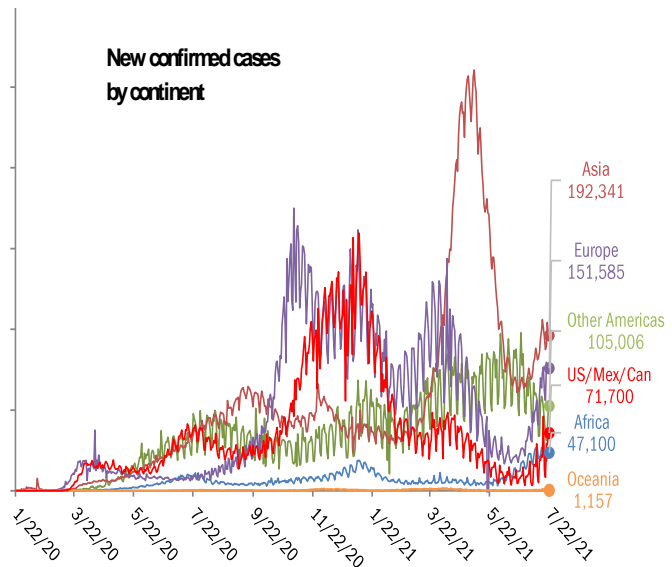


## Data Insights: Covid-2019 Monitor

Friday, July 23, 2021

### The global scorecard

The worst ten countries			
New cases		New Deaths	
United States	+55,058	Indonesia	+1,449
Brazil	+49,757	Brazil	+1,412
Indonesia	+49,509	Russia	+783
United Kingdom	+40,029	India	+483
India	+35,342	South Africa	+433
Spain	+29,535	Mexico	+419
Russia	+23,938	Colombia	+354
France	+22,148	Burma	+319
Iran	+20,313	United States	+315
Mexico	+16,244	Argentina	+256
<b>+341,873</b>		<b>+6,223</b>	
World	+568,889	World	+8,742
Top ten	60%	Top ten	71%



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

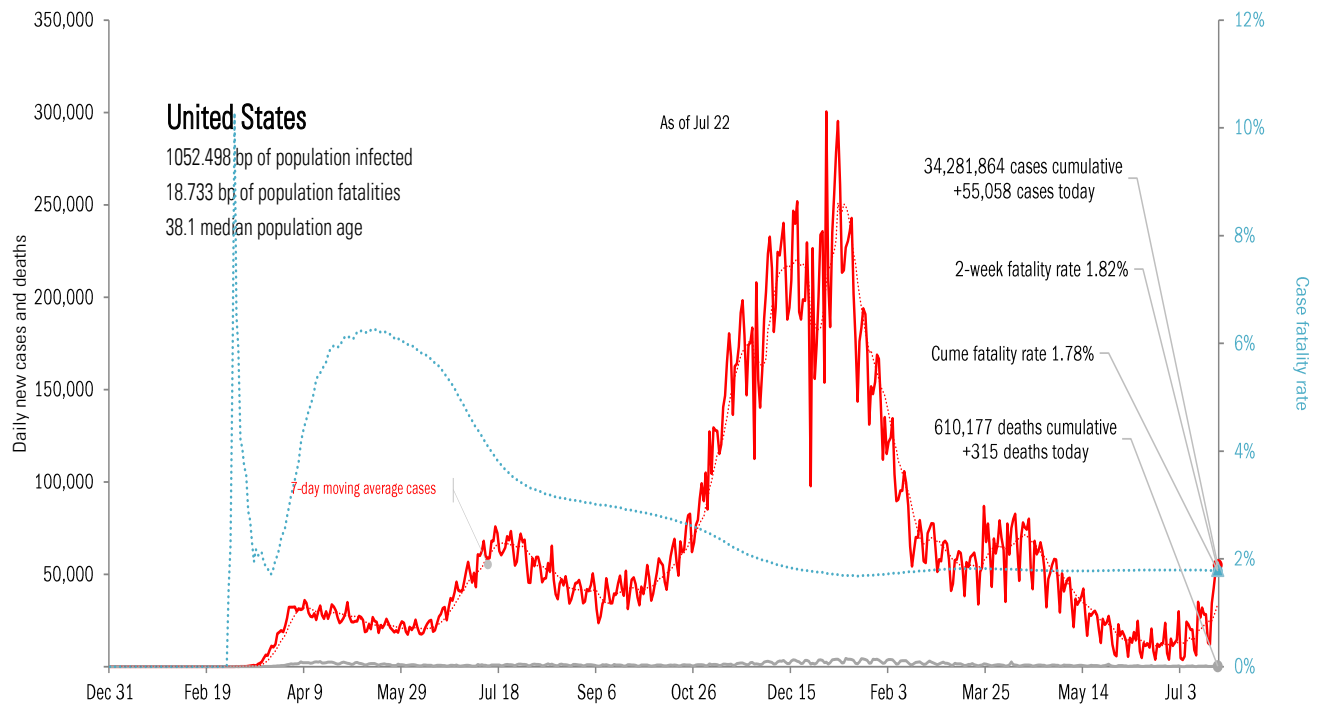
## The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
CA	+10,340		CA	+72		FL	+206		CA	3,893,526		CA	64,235		TX	260,020		RI	89%	MO	27%
TX	+6,869		TX	+31		TX	+100		TX	3,064,743		NY	53,798		CA	244,496		MA	85%	AR	23%
FL	+6,493		FL	+29		CA	+80		FL	2,461,491		TX	52,935		FL	196,191		MD	85%	NV	22%
MO	+3,278		KS	+20		GA	+55		NY	2,131,535		FL	38,410		NY	137,570		MO	84%	UT	20%
LA	+2,834		AR	+15		LA	+48		IL	1,406,459		PA	27,819		GA	111,387		PA	82%	WY	17%
WA	+2,562		LA	+15		AL	+43		PA	1,223,026		NJ	26,564		PA	92,342		FL	81%	MS	15%
GA	+2,144		TN	+15		AZ	+33		GA	1,155,208		IL	25,831		CH	88,864		CT	81%	FL	14%
IL	+1,993		WV	+14		NY	+28		CH	1,120,120		GA	21,605		IL	83,639		NV	81%	TX	13%
AR	+1,860		GA	+12		NV	+24		NJ	1,031,346		MI	21,124		KY	80,000		DC	81%	OK	13%
NC	+1,800		NC	+12		UT	+23		NC	1,029,931		CH	20,449		MI	73,744		MN	80%	ID	13%
+40,173			+235			+640			18,517,385			352,770			1,368,253						
All states	+61,551		+344			+611			All states	34,281,864		610,177			2,437,679			All states	70%	67%	
Top ten	65%		68%			105%			Top ten	54%		58%			56%			Median	73%	5%	

Some states not reporting

## Five most improved US states

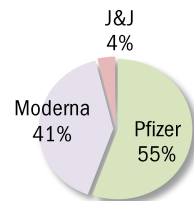
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
LA	-2,554	OK	-37	KY	-364	AL	+20 bp
IA	-1,395	NV	-20	AR	-57	WY	+20 bp
TX	-1,317	FR	-14	CH	-44	FR	+20 bp
FR	-1,191	IA	-12	MO	-33	AR	+10 bp
AK	-475	GA	-10	MS	-24	LA	+10 bp



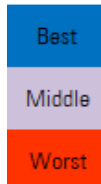
Source: [Johns Hopkins](#), [Dept. of Health and Human Services](#), [CDC](#), TrendMacro calculations

# Rolling out the vaccines in the US and the world

US overall	Total				Today	Immunity	Full	Partial
Doses distributed	403,904,165				+0.750 million	US	48.5%	56.0%
Doses administered	349,587,019				+0.673 million	UK	53.9%	68.4%
Administered	One dose	% Pop	Immune	% pop	New immune today	France	43.5%	57.1%
Total population	191,949,577	57%	166,428,305	50%	+0.284 million	Spain	53.6%	64.6%
Age 12 to 17	10,021,696	40%	7,855,753	31%	+0.056 million	Germany	48.2%	60.2%
Age 18 to 64	131,269,613	64%	113,376,170	56%	+0.196 million	Italy	46.5%	61.3%
Age 65 and over	50,435,572	92%	45,067,061	82%	+0.032 million	Australia	12.1%	29.7%



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 **197 days** by Feb 5, 2022

61.4% of population >18 immunized  
11.7% previously tested positive  
**73.0%** vs 60% adult herd immunity\*

Global data differs from sources, timing

AK
62.0%
50.8%
45.1%

ME	NH
74.2%	73.5%
67.7%	64.1%
63.0%	57.9%

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As of Jul 23

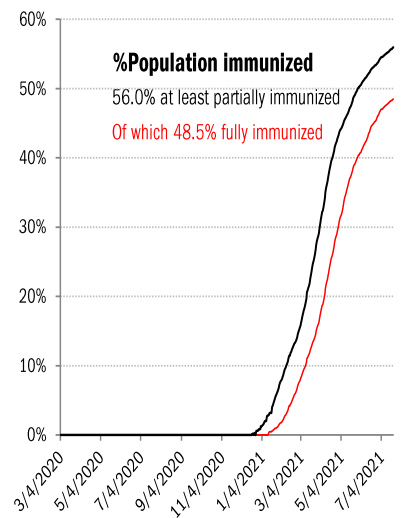
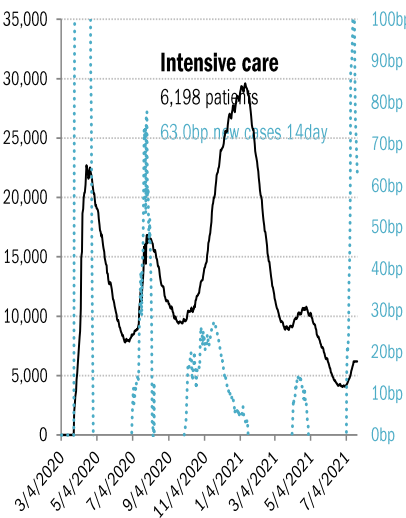
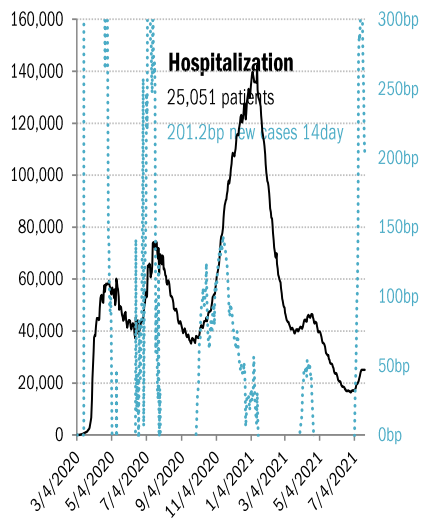
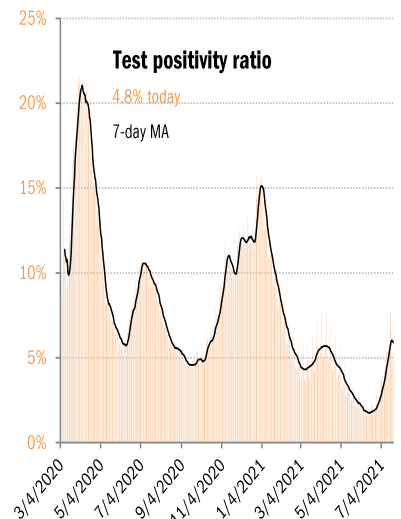
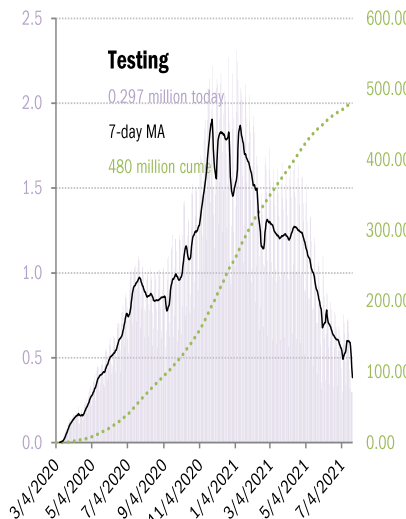
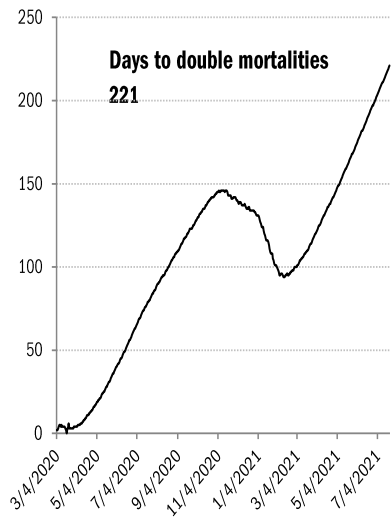
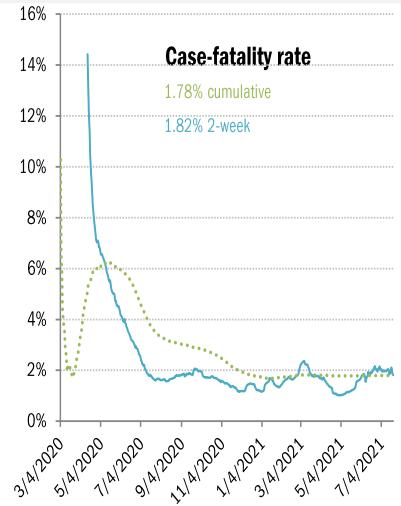
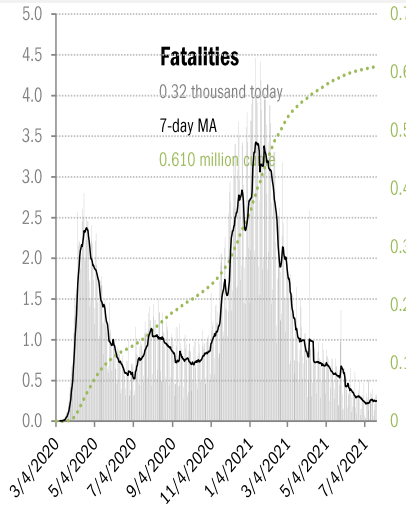
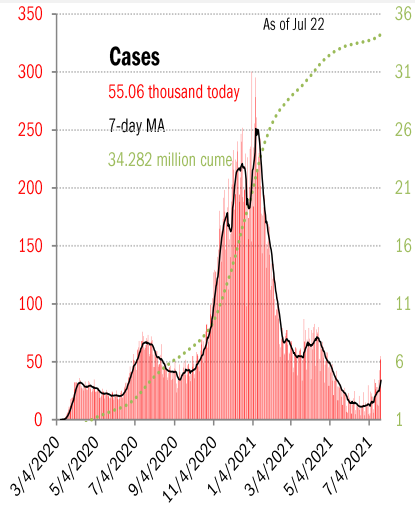
\* Includes persons >18 fully immunized or previously tested positive, no overlap. Disregards untested positives, natural immunities.

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

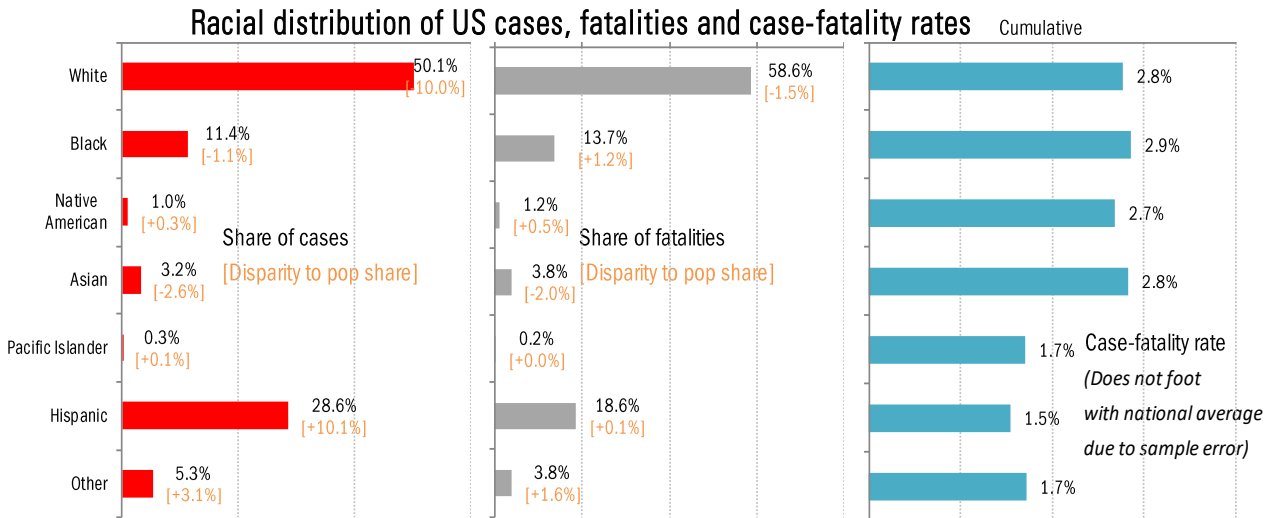
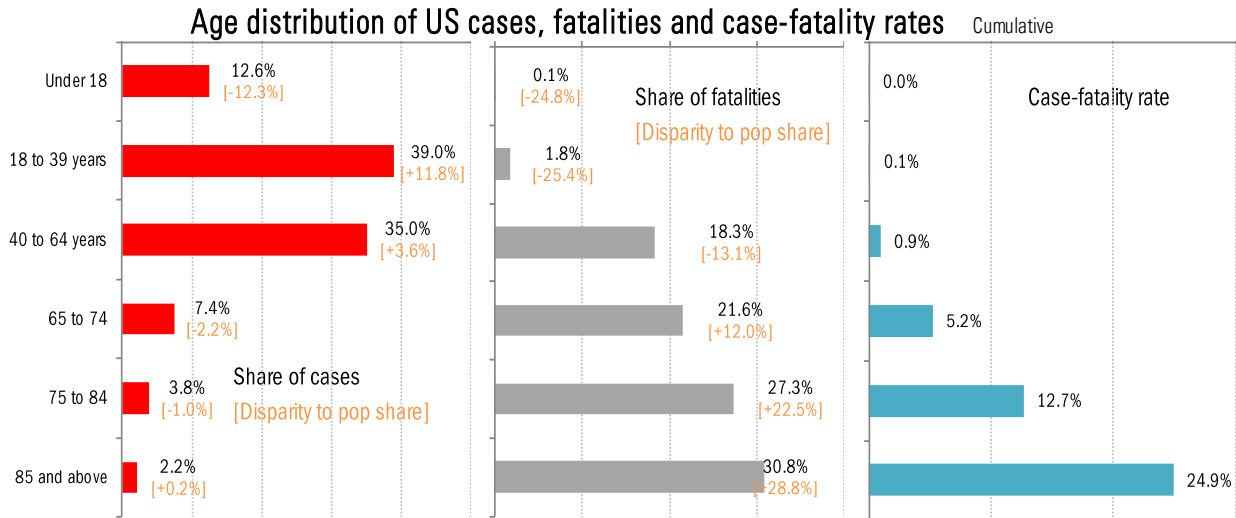
Source: [CDC](#), [CDC](#), [Our World in Data](#), TrendMacro calculations

# US deep-dive

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

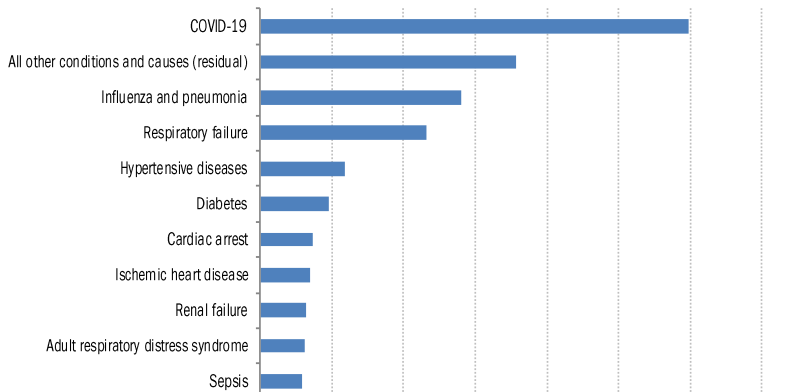


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations



### Comorbidities

Top-ten joint causes of Covid mortalities, cumulative



As of Jul 11

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

### [Why Covid-19 Vaccines Work Well Against Delta Variant](#)

Jared S. Hopkins  
*New York Times*  
July 22, 2021

### [Sen Rand Paul says he's asking DOJ for 'a criminal referral' into Fauci](#)

Joseph Guzman  
*Changing America*  
July 21, 2021

### [Why Vaccinated People Are Getting 'Breakthrough' Infections](#)

Apoorva Mandavilli  
*New York Times*  
July 22, 2021

### [Covid May Have Claimed as Many as 5 Million Lives in India](#)

Bibhudatta Pradhan and Abhijit Roy Chowdhury  
*Bloomberg*  
July 21, 2021

### [Polling on Mandatory or Voluntary Vaccination](#)

*Trafalgar Group*  
July 2021

### [Boy Dies of Bird Flu in India's First Case of Human Death](#)

Bibhudatta Pradhan and Atul Prakash  
*Bloomberg*  
July 21, 2020

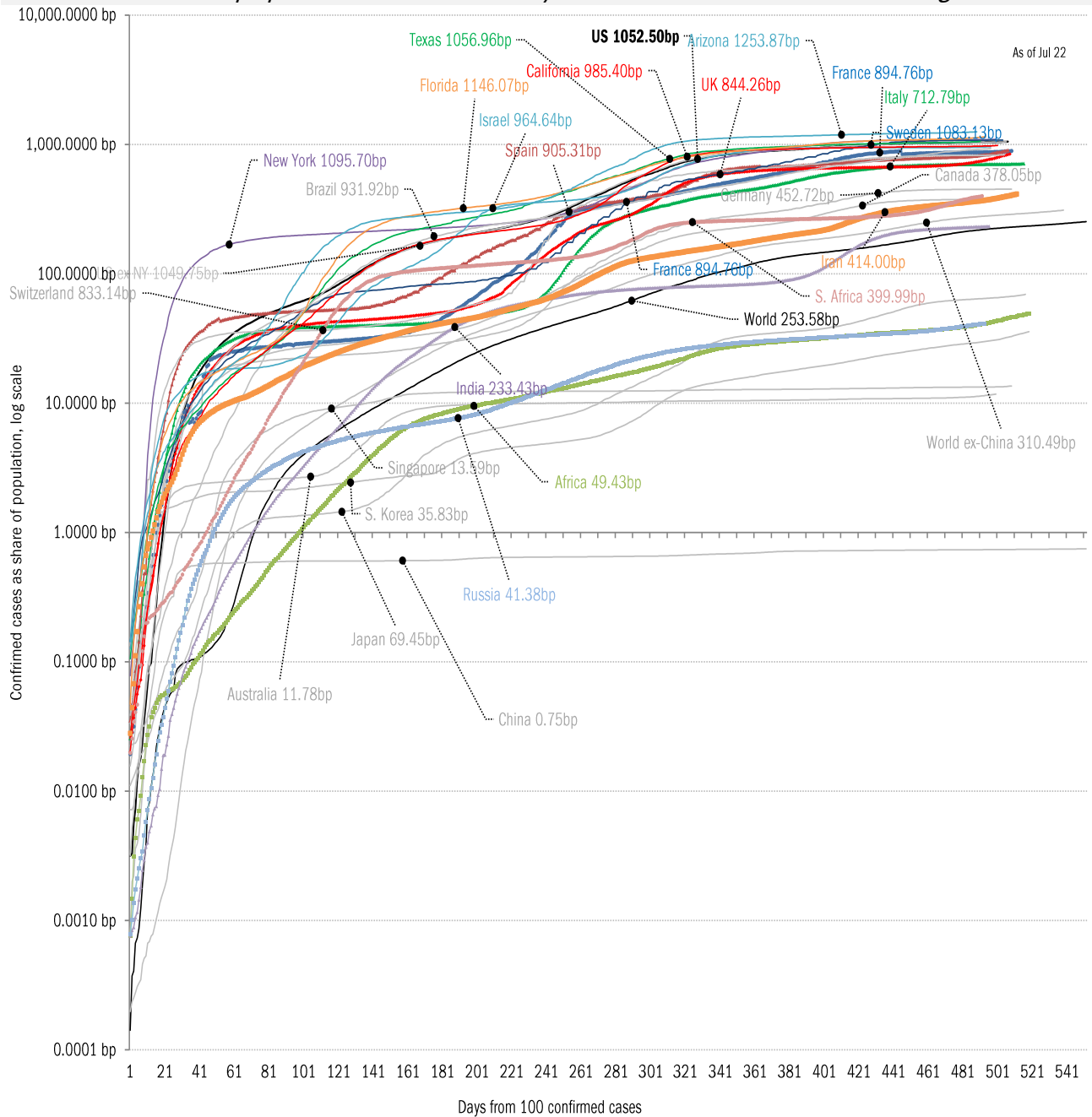
## Meme of the day

The door to door vaccine guy  
halfway through his first shift .



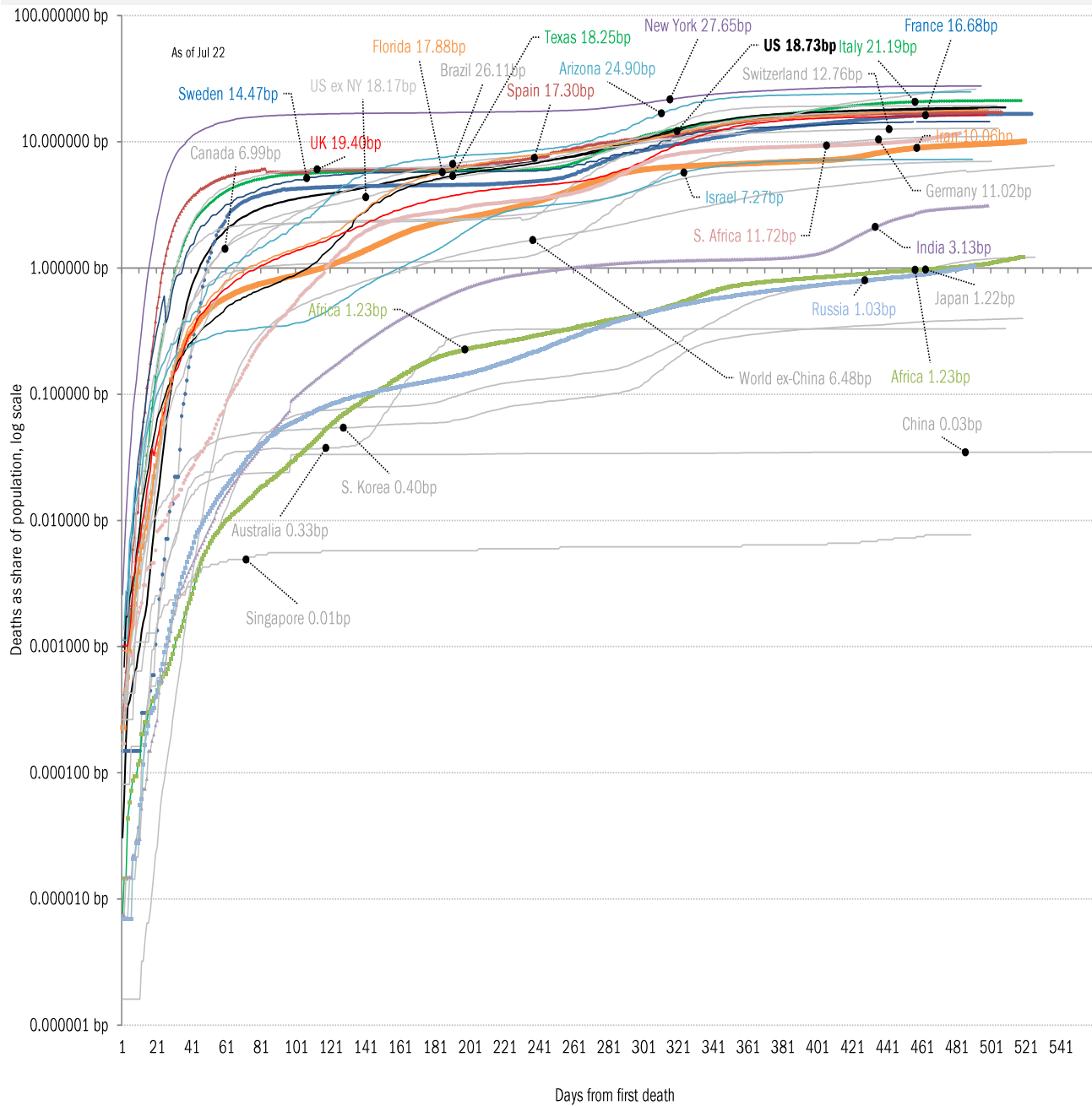
Source: Our beloved clients, [Power Line blog "The Week in Pictures"](#) and [CTUP](#)

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*



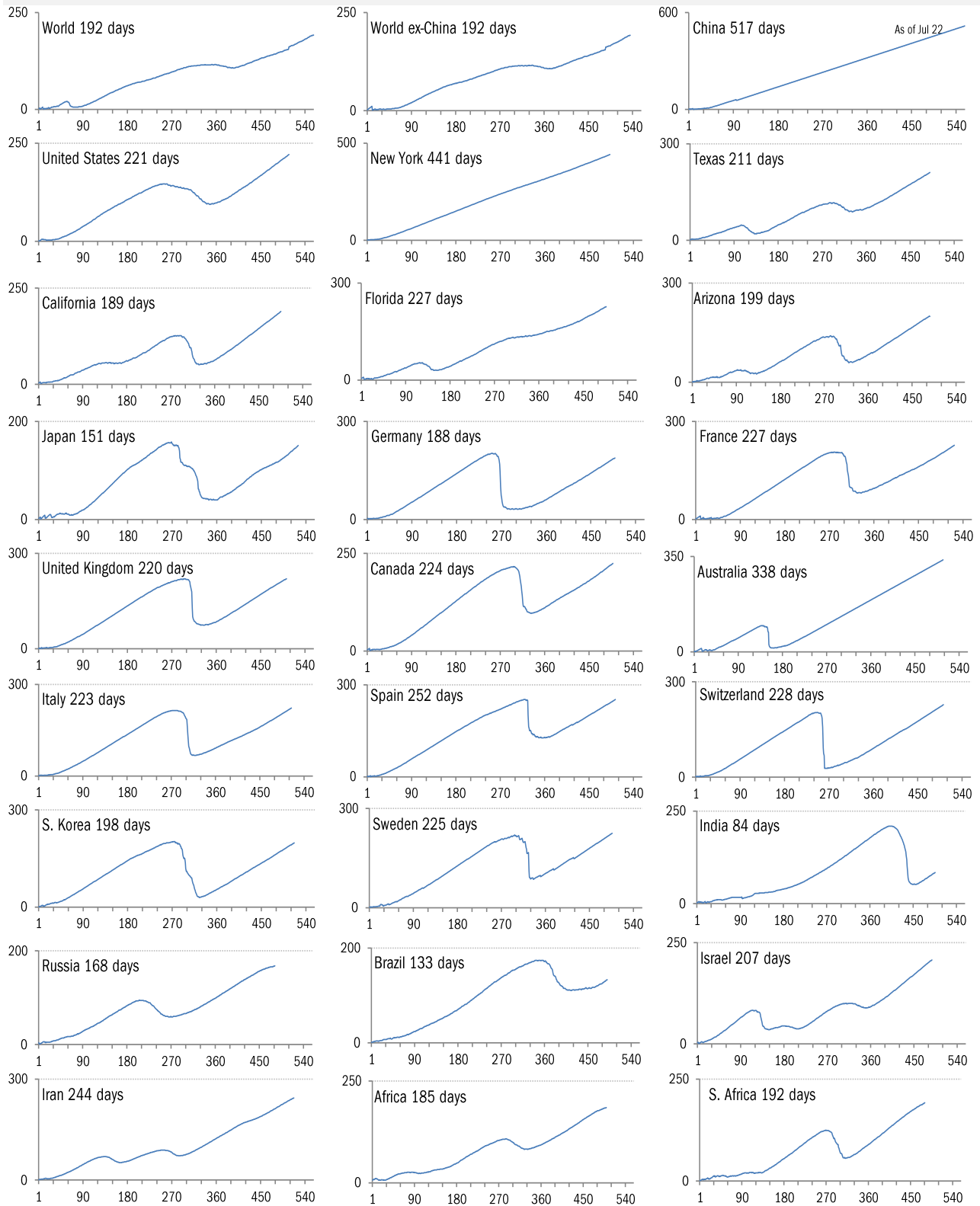
Source: [Johns Hopkins](#), TrendMacro calculations



# "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

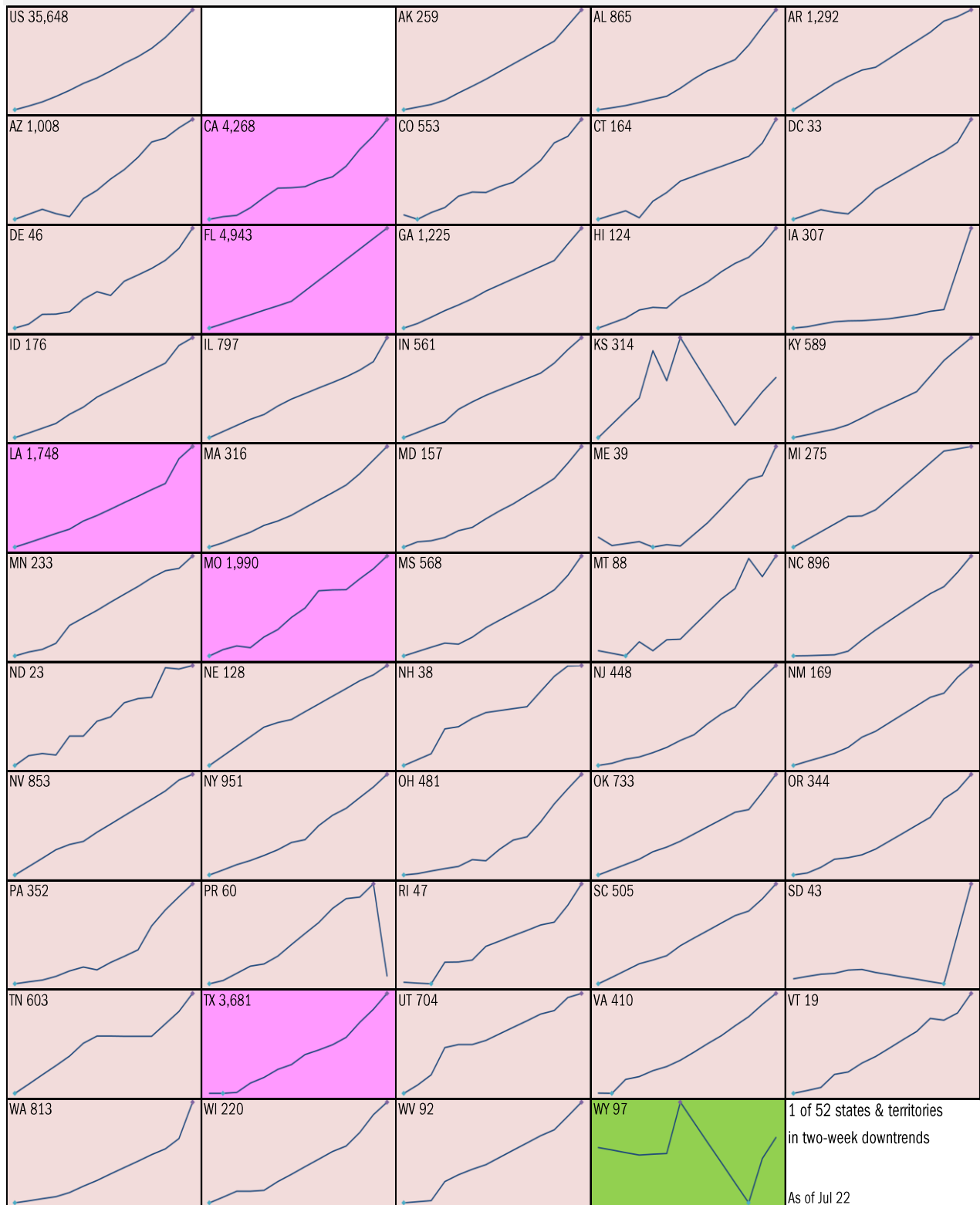


Source: [Johns Hopkins](#), TrendMacro calculations

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

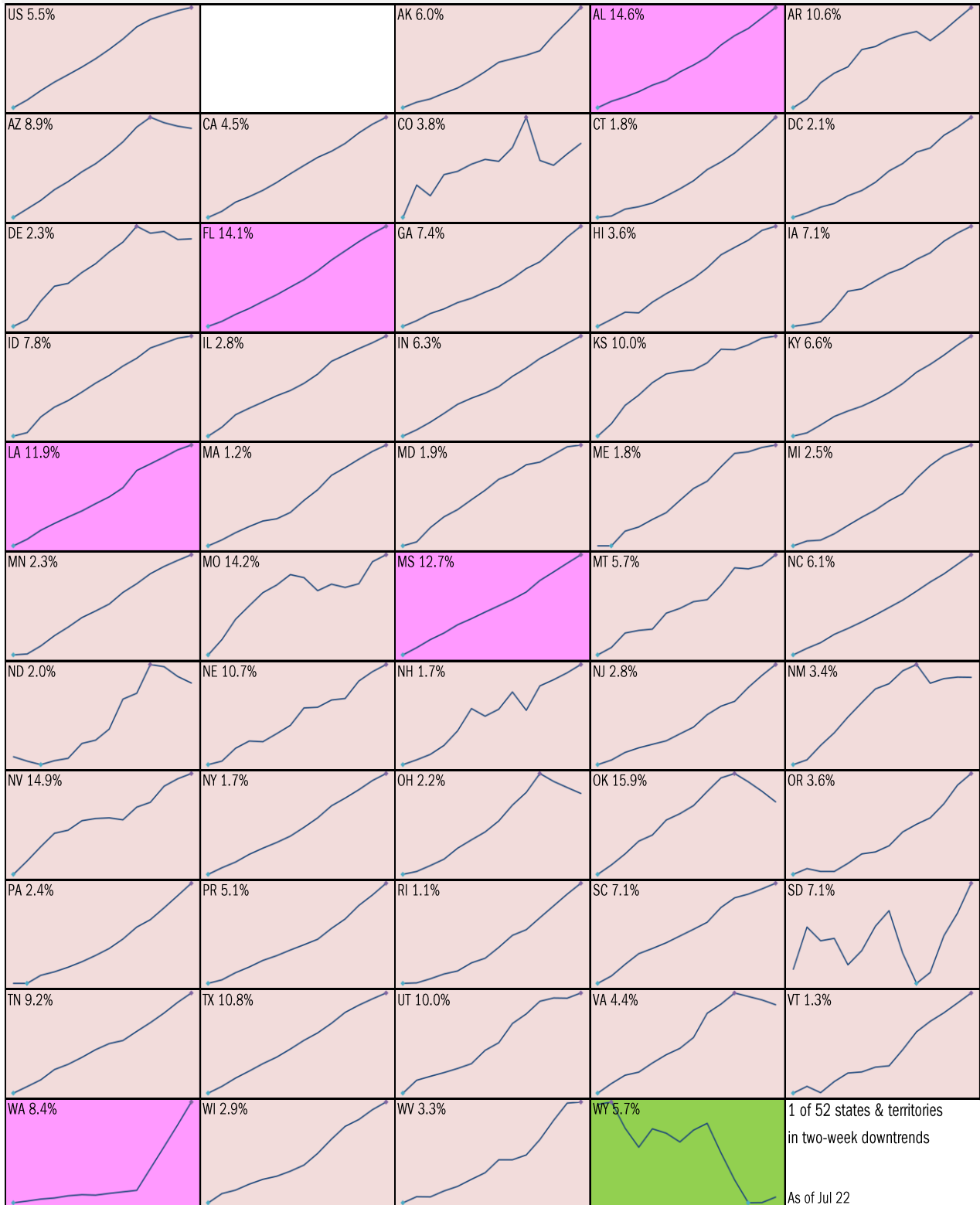


Source: [Johns Hopkins](#), TrendMacro calculations

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

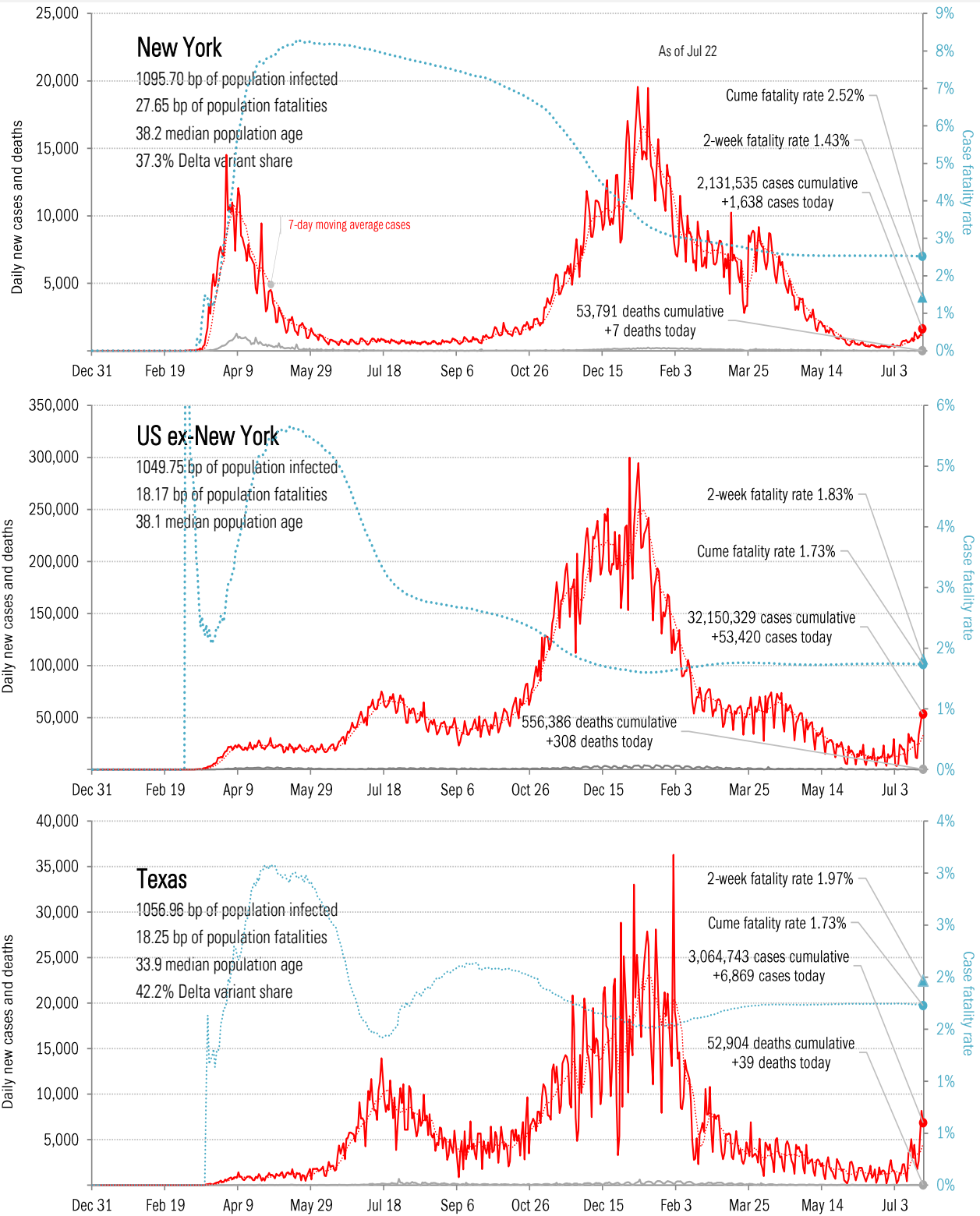
14-day moving average, last 14 days Most recent value displayed ● High ● Low

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



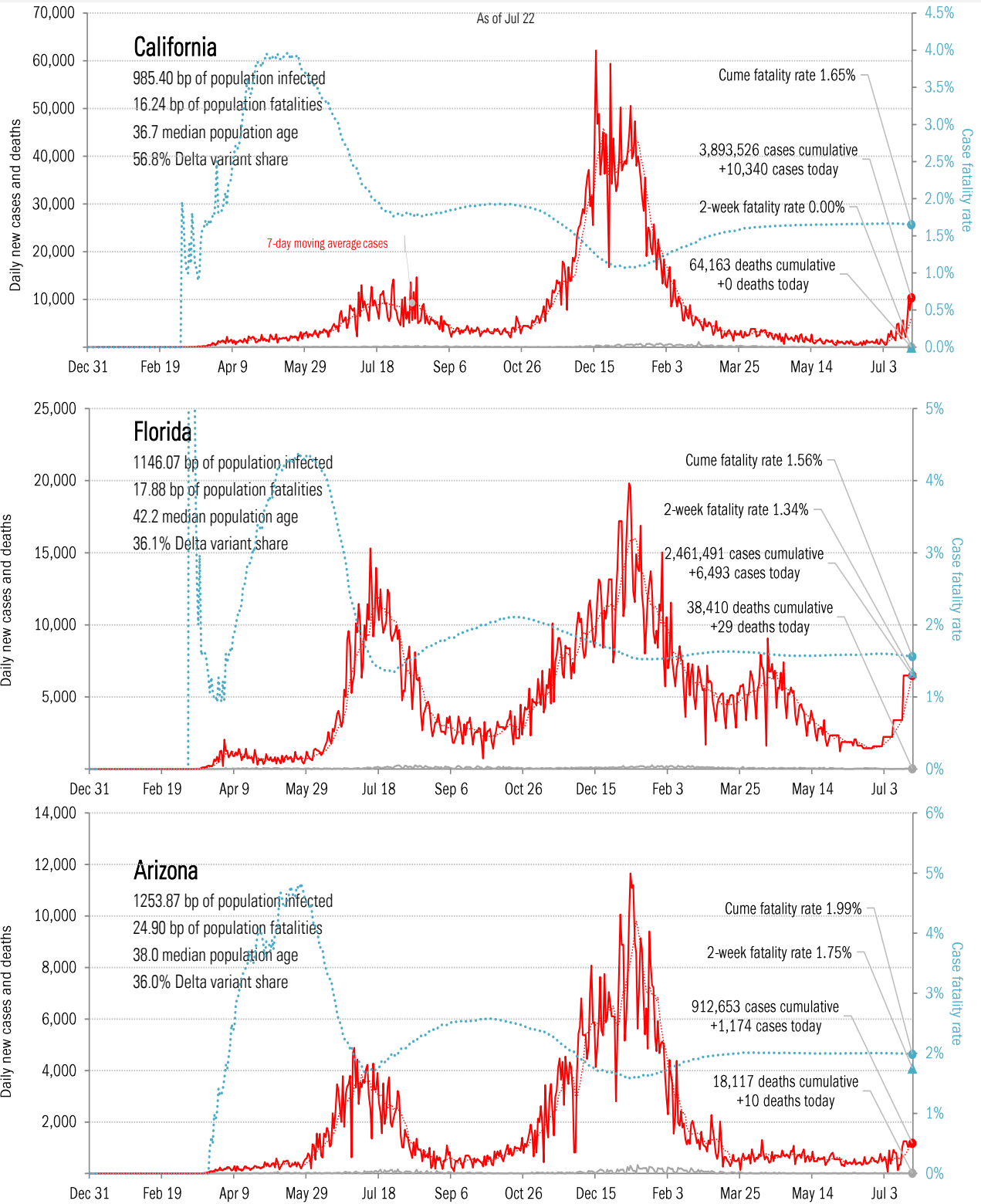
Source: [Covid Act Now](#), TrendMacro calculations

# From Ground Zero to the Rio Grande



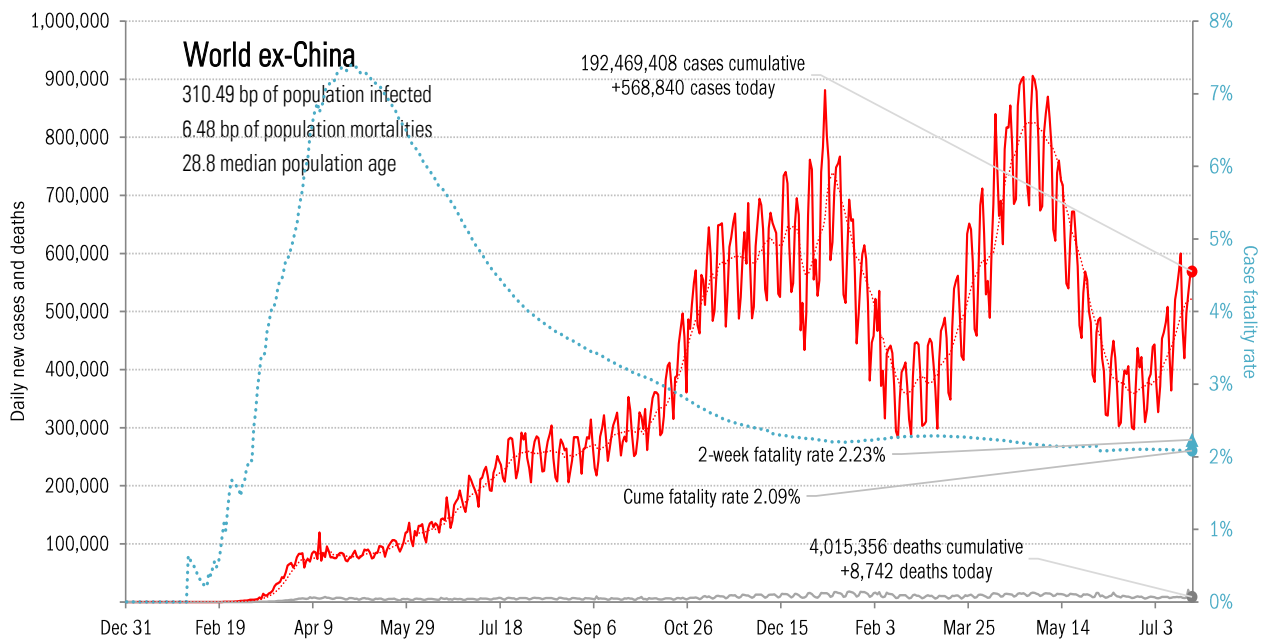
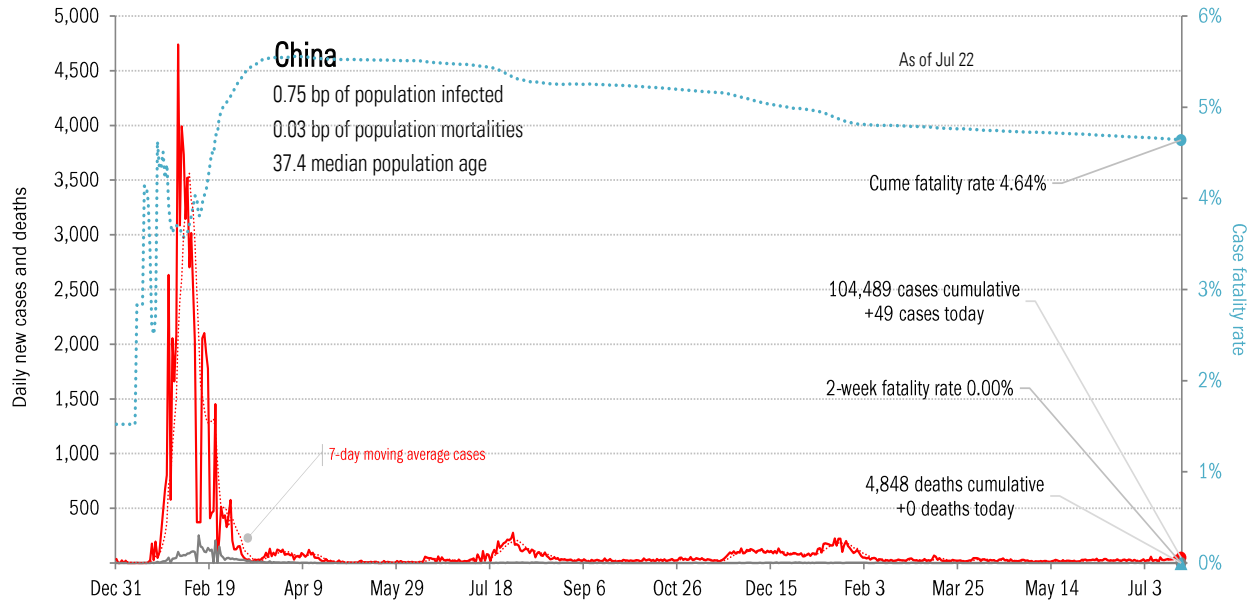
Source: [Johns Hopkins](#), TrendMacro calculations

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



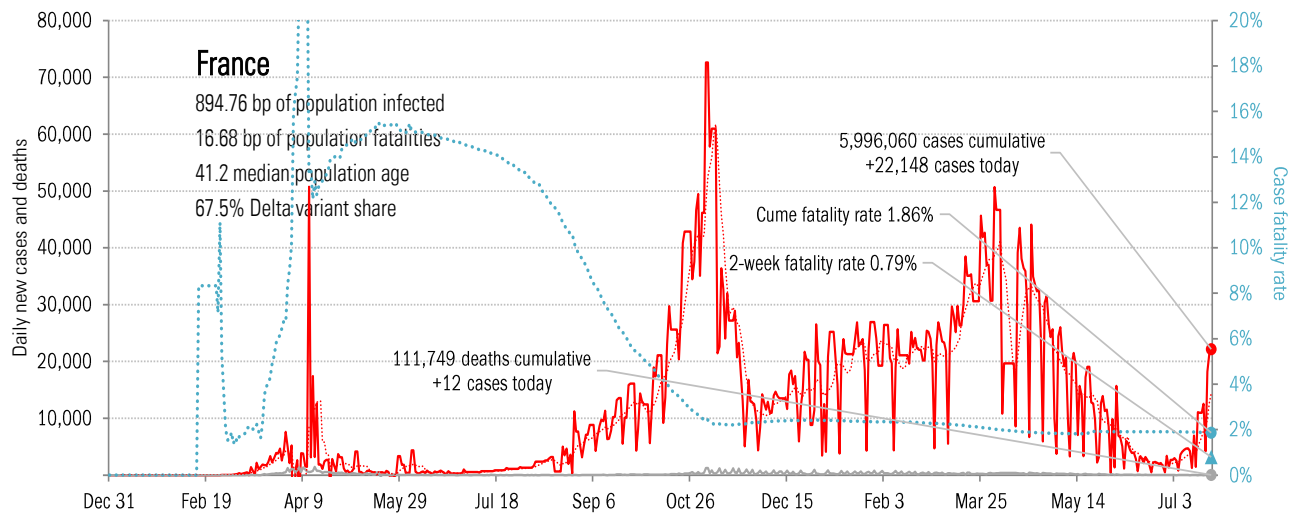
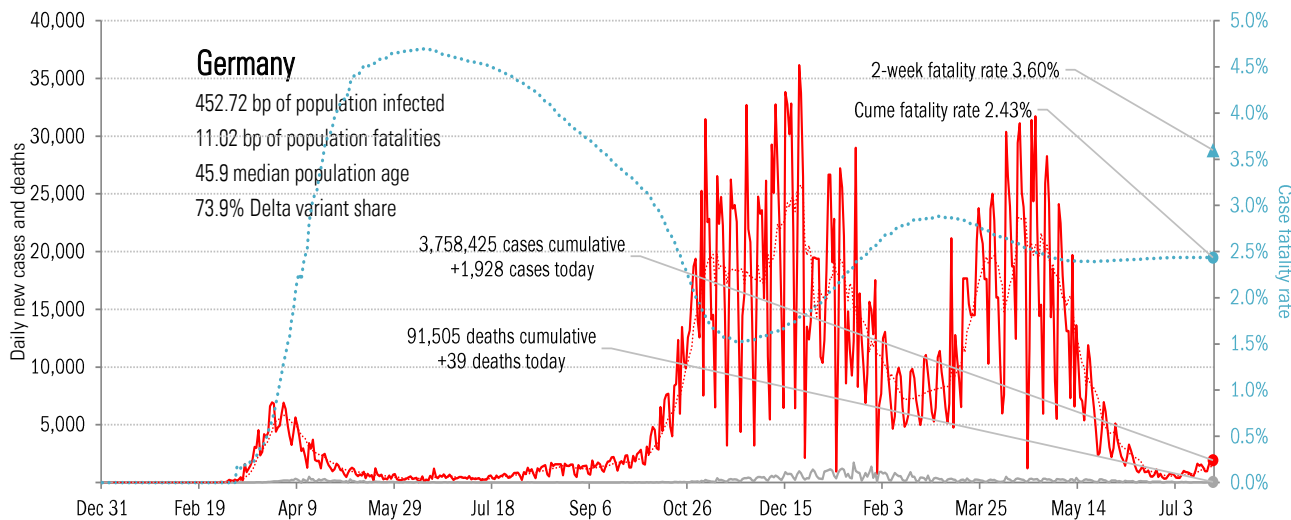
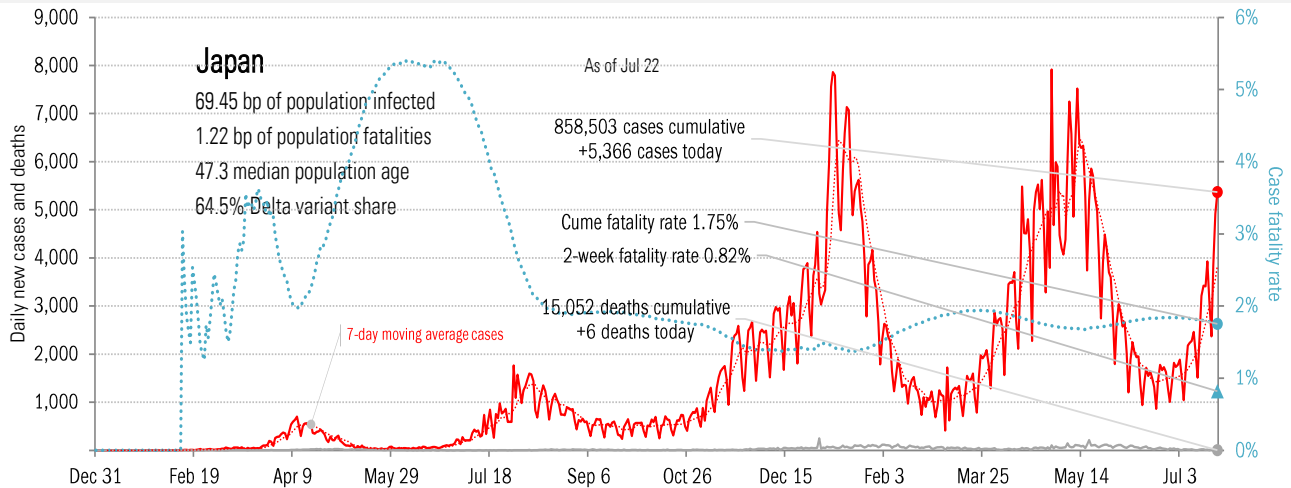
Source: [Johns Hopkins](#), TrendMacro calculations

# Patient zero... and then everyone else



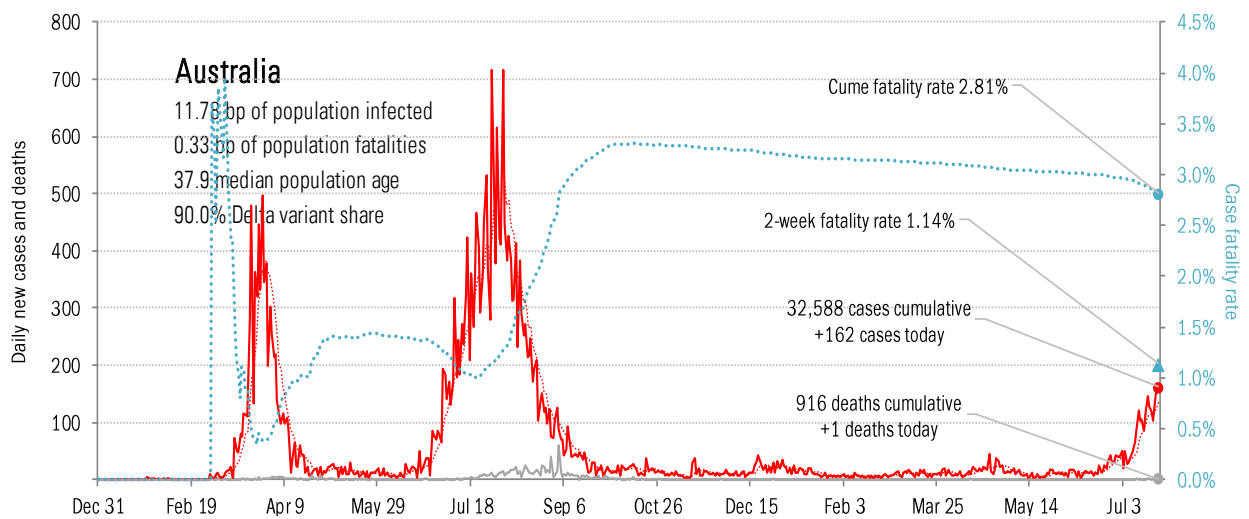
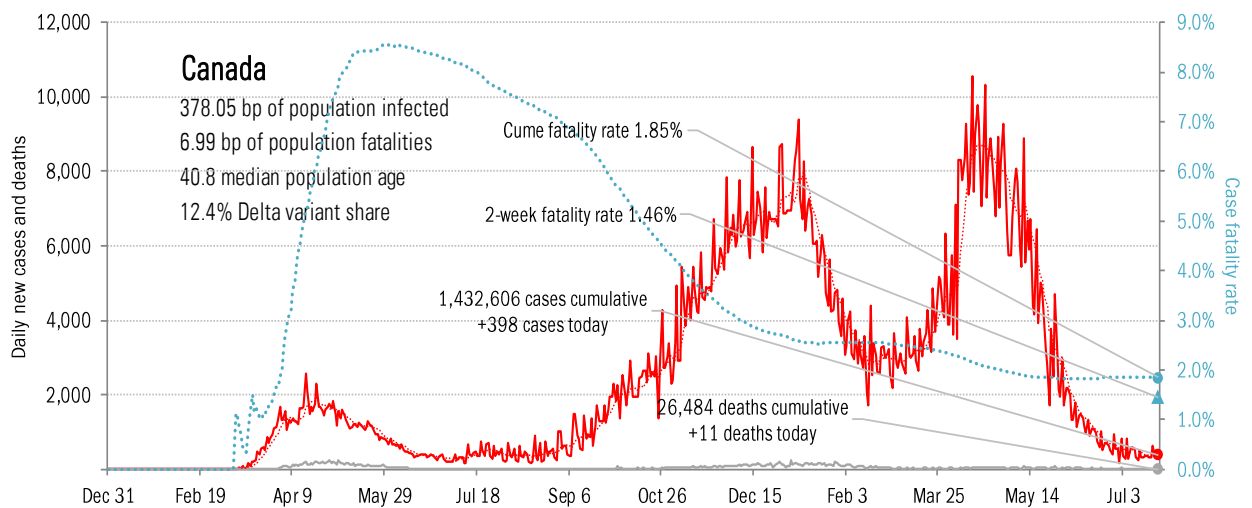
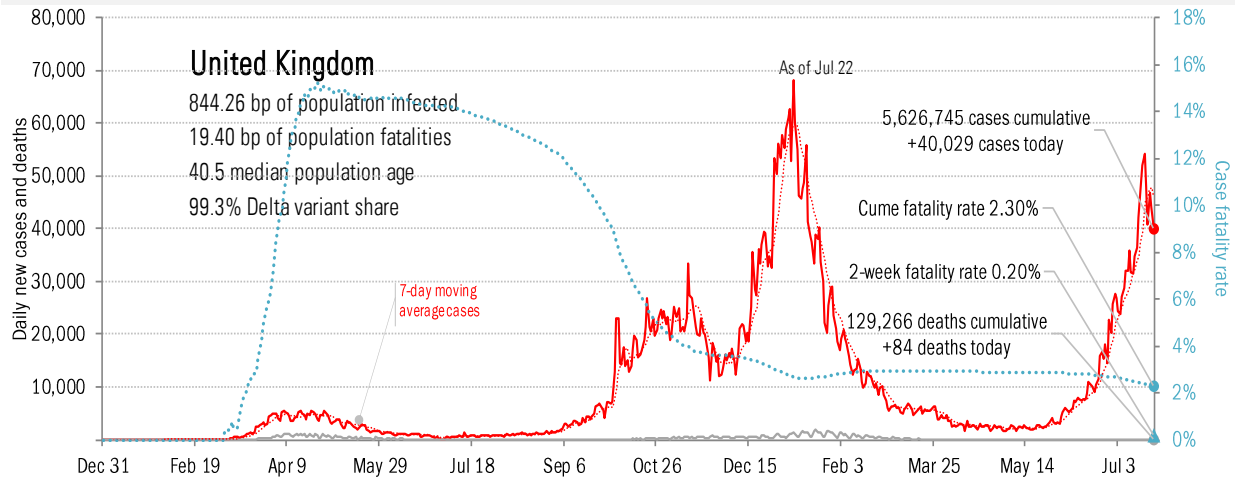
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the largest economies



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

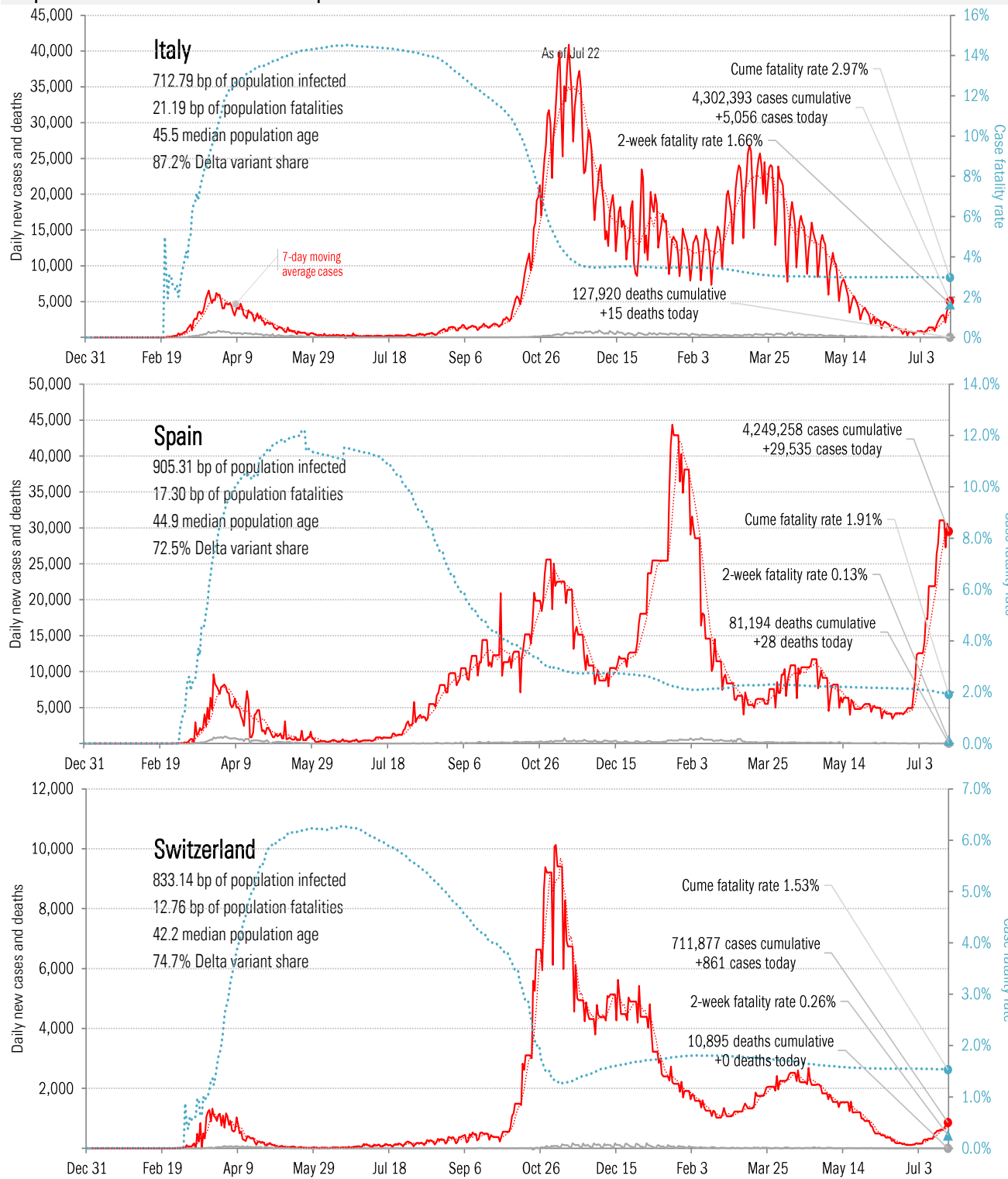
# Impact in The Anglosphere



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

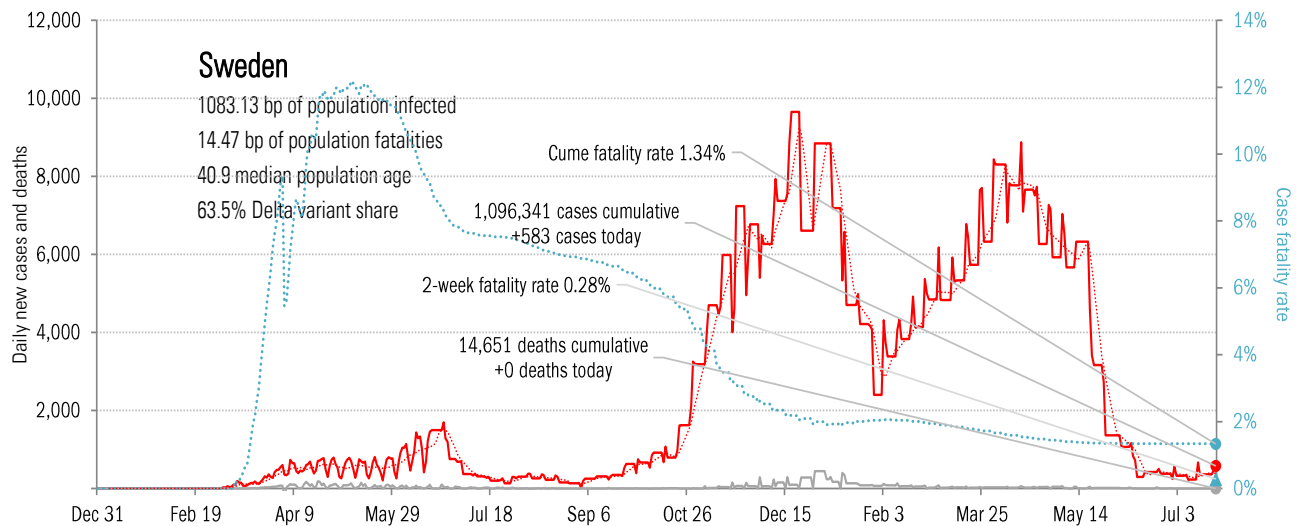
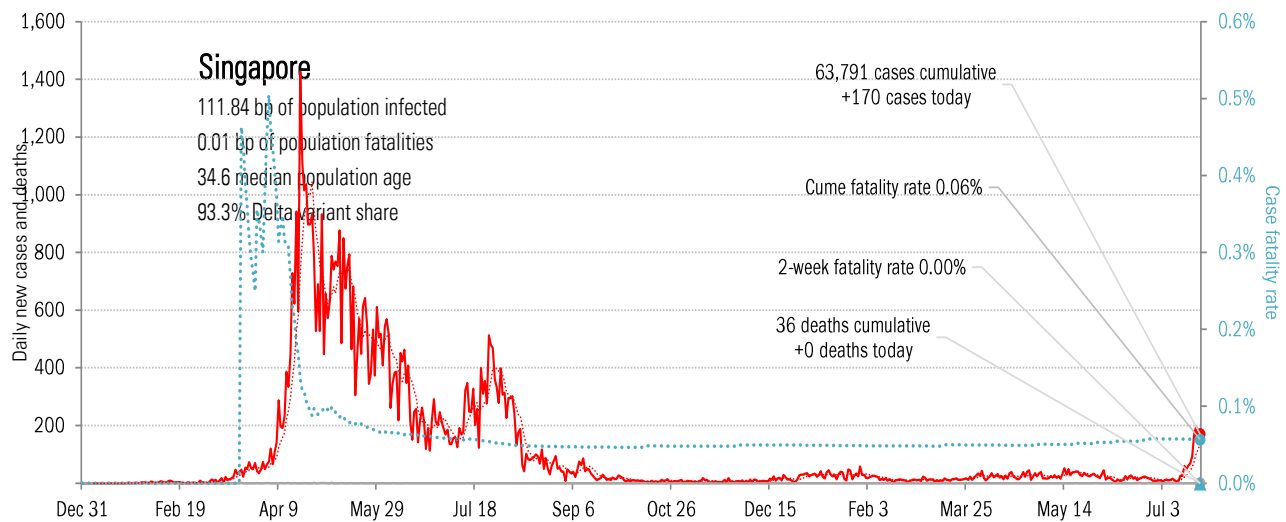
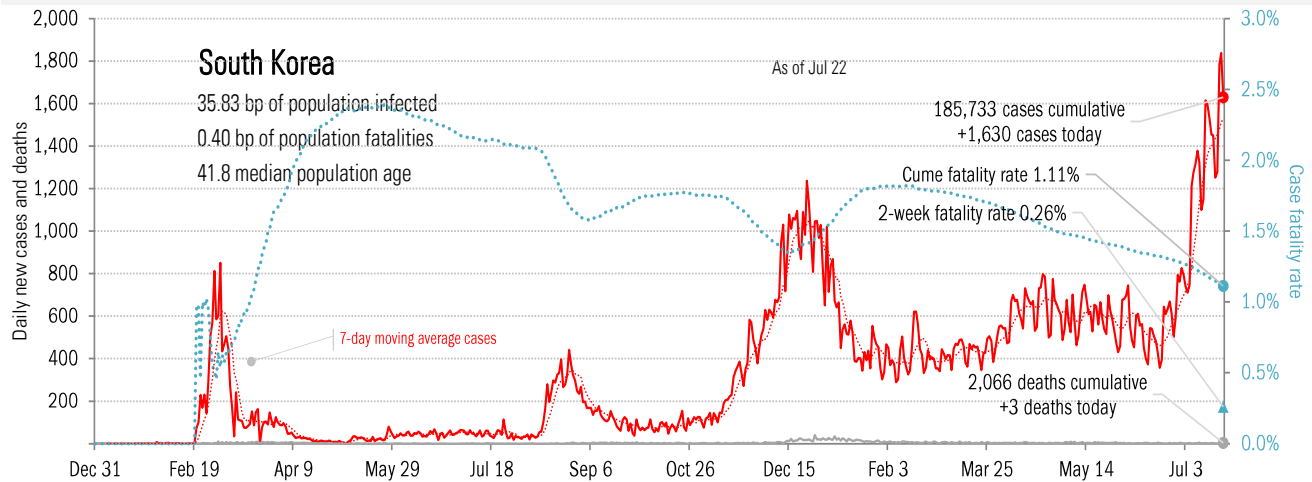


# Impact in continental Europe



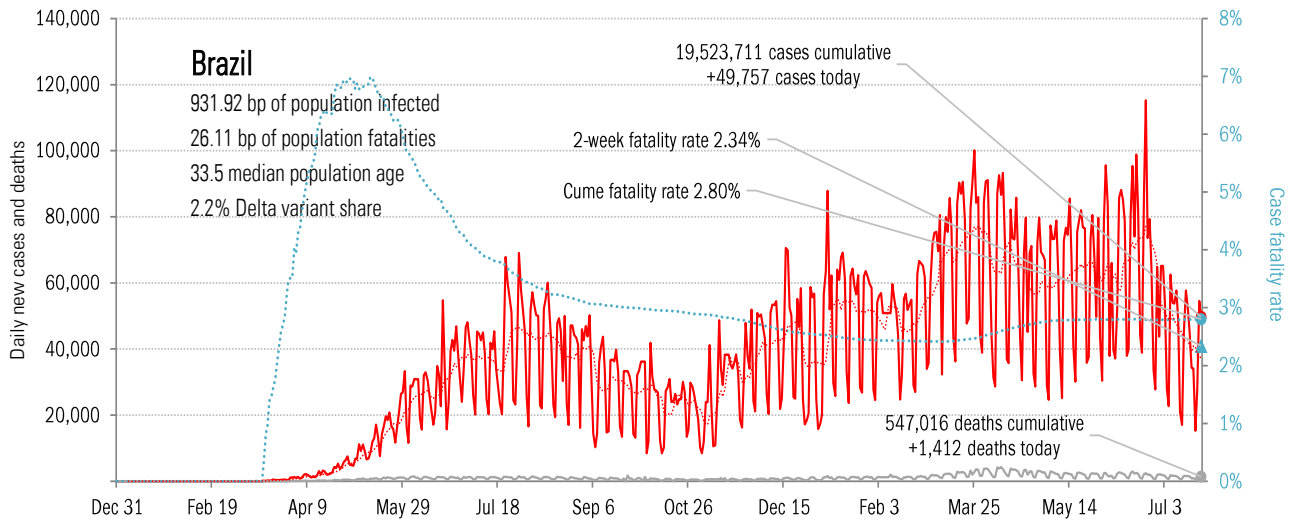
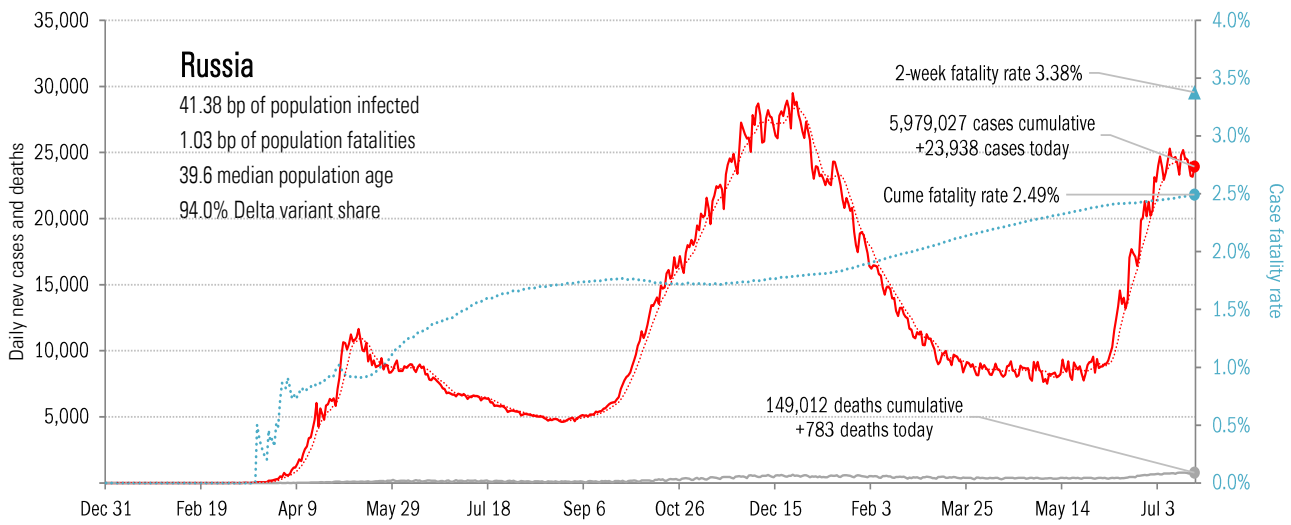
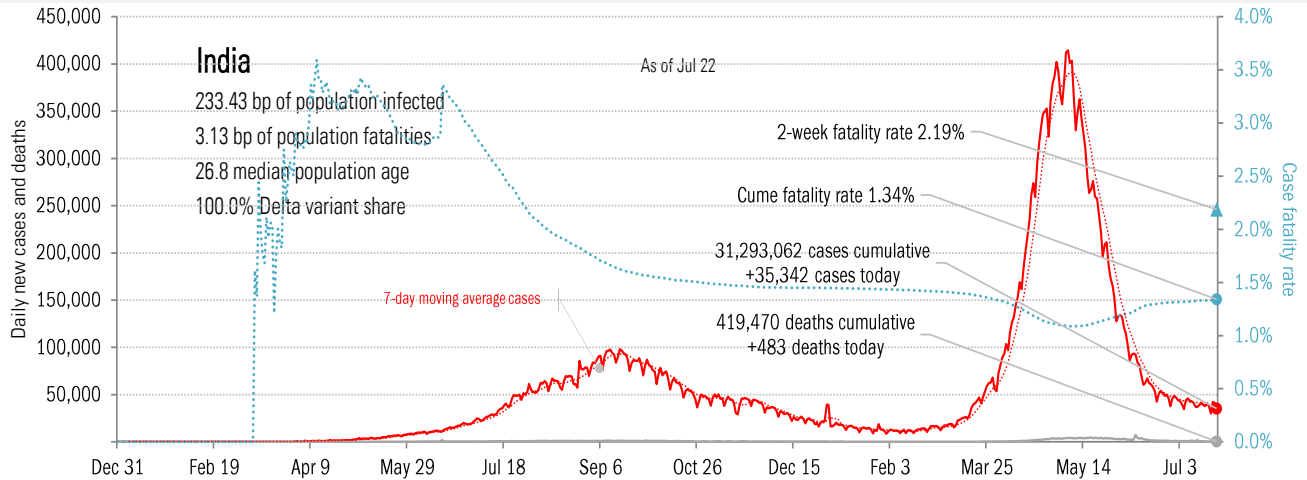
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in other hot-spots



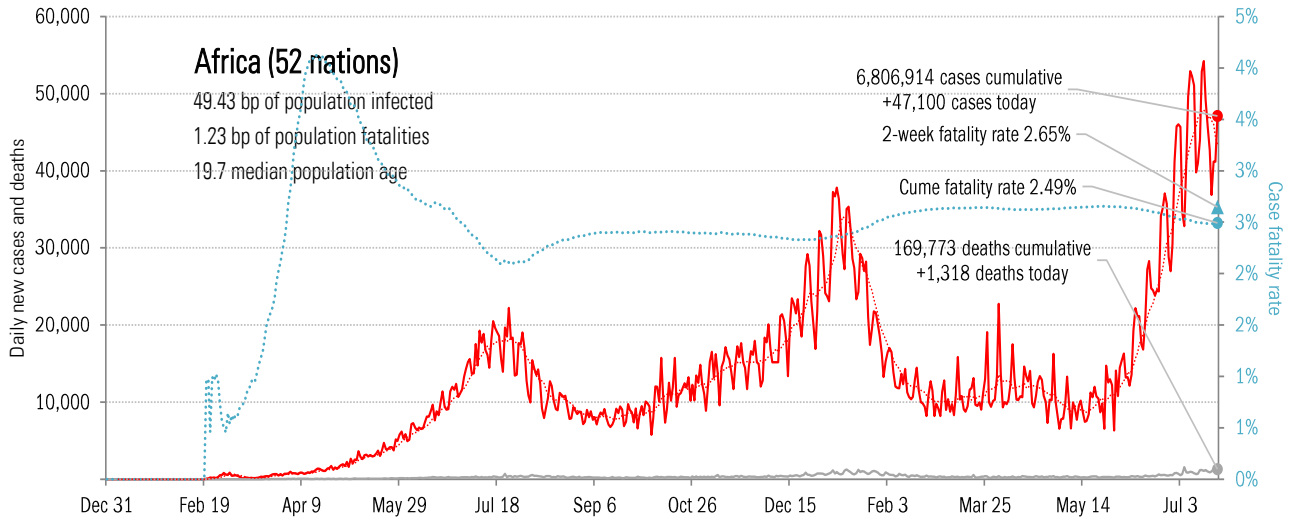
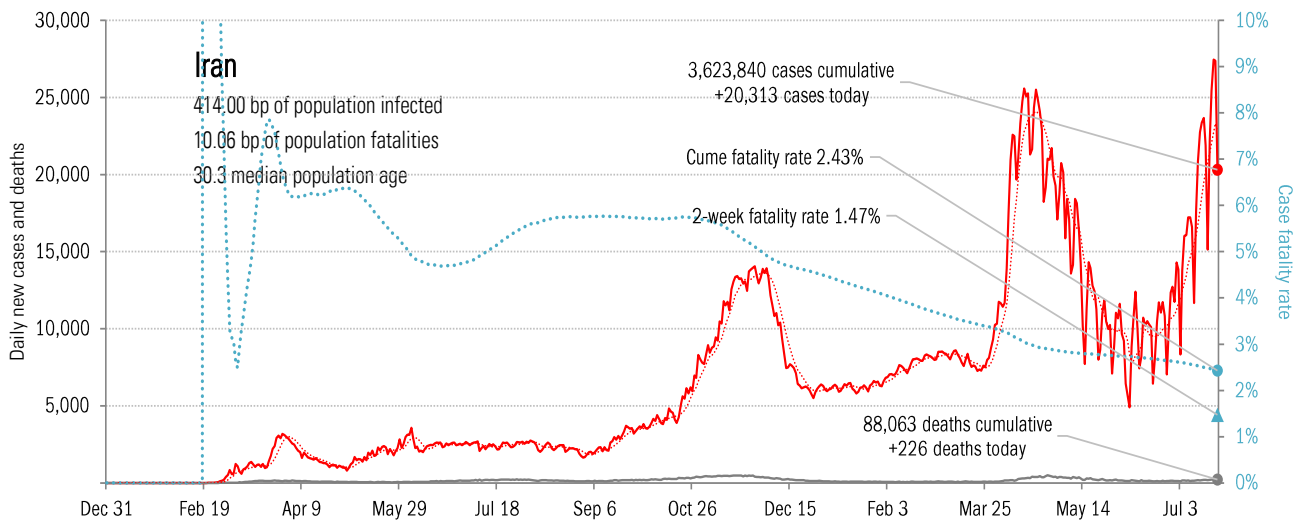
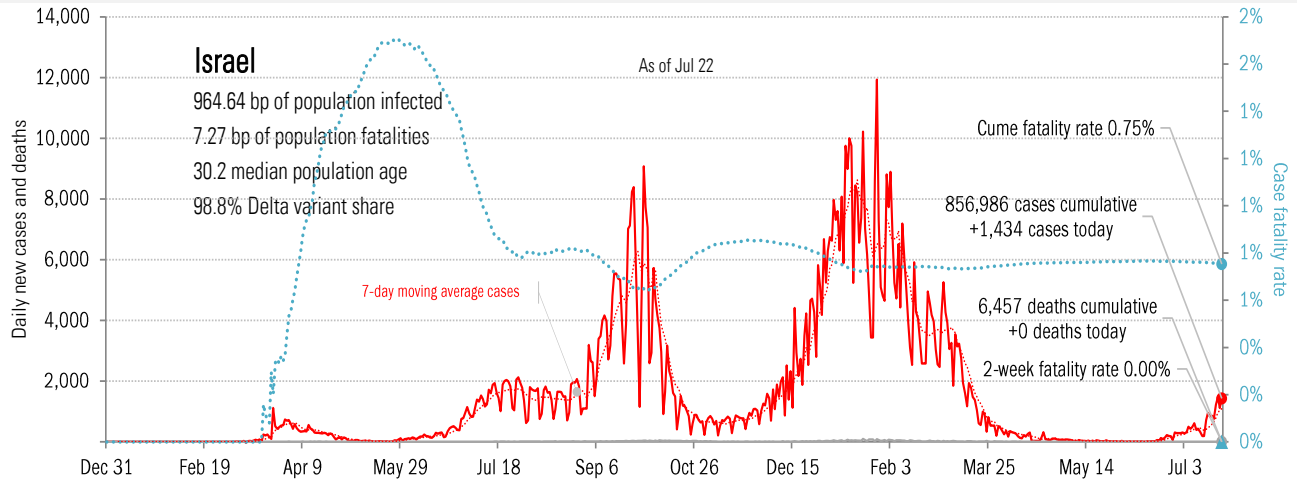
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the BRICs ex-China



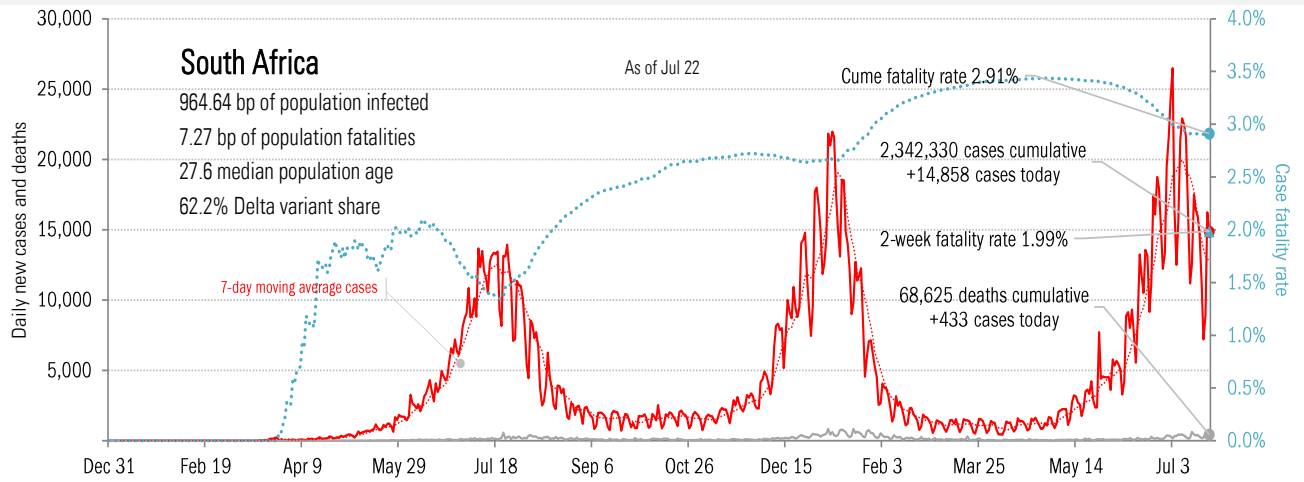
Source: [Johns Hopkins](#), TrendMacro calculations

# Impact in the Middle East and Africa



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

# Impact in Africa, continued



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