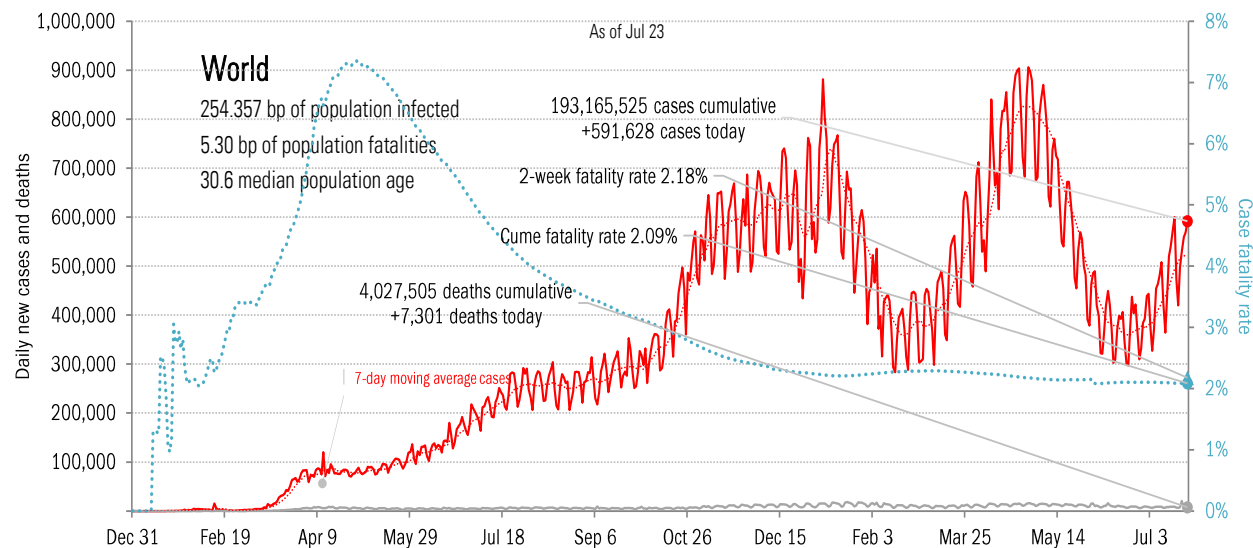
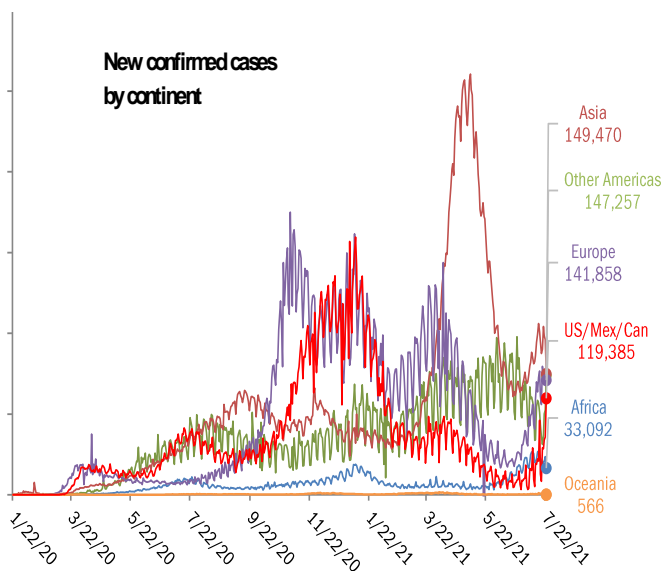


Data Insights: Covid-2019 Monitor

Saturday, July 24, 2021

The global scorecard

The worst ten countries			
New cases		New Deaths	
Brazil	+108,732	Indonesia	+1,566
United States	+55,058	Brazil	+1,324
Indonesia	+49,071	Russia	+784
United Kingdom	+36,093	United States	+543
Spain	+31,171	South Africa	+450
Russia	+23,276	Colombia	+352
Iran	+21,814	Burma	+326
France	+19,409	Argentina	+285
Argentina	+15,622	Iran	+210
Malaysia	+15,573	Bangladesh	+166
World		World	
+591,628		+7,301	
Top ten 64%		Top ten 82%	



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

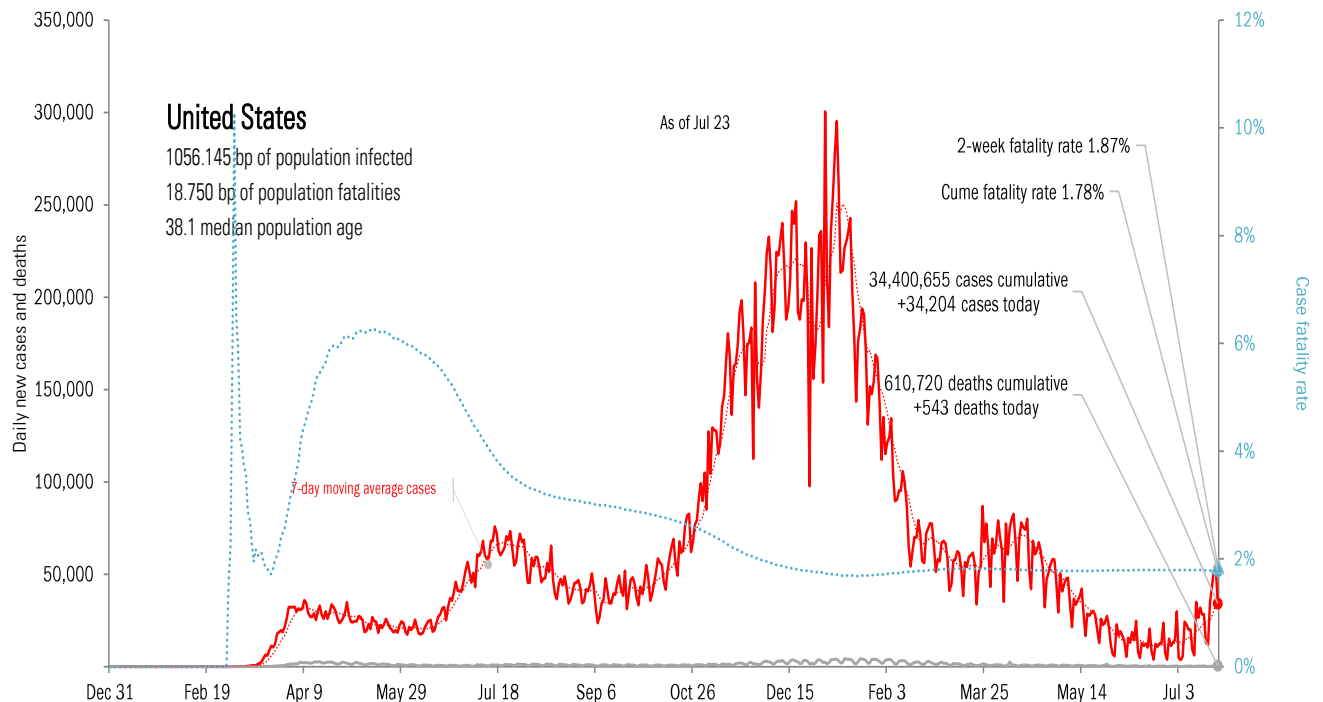
The ten worst US states

New cases			New Deaths		New in hospital		Curre cases			Curre deaths		Curre in hospital		Hospital use		ICU use	
FL	+10,452		TX	+47	FL	+206	CA	3,894,556	CA	64,228	TX	260,020	RI	89%	MO	27%	
TX	+6,160		FL	+27	TX	+100	TX	3,070,903	NY	53,801	CA	244,496	MA	85%	AR	23%	
LA	+3,127		KS	+22	CA	+80	FL	2,471,943	TX	52,982	FL	196,191	MD	85%	NV	22%	
MO	+2,791		MI	+22	GA	+55	NY	2,133,264	FL	38,437	NY	137,570	MO	84%	UT	20%	
GA	+2,497		NV	+20	LA	+48	IL	1,407,929	PA	27,820	GA	111,387	PA	82%	WY	17%	
NC	+1,998		CH	+18	AL	+43	PA	1,223,476	NJ	26,568	PA	92,342	FL	81%	MS	15%	
AR	+1,987		MO	+15	AZ	+33	GA	1,157,705	IL	25,834	CH	88,864	CT	81%	FL	14%	
AL	+1,733		LA	+11	NY	+28	CH	1,120,922	GA	21,614	IL	83,639	NV	81%	TX	13%	
MI	+1,730		CO	+9	NV	+24	NJ	1,032,255	MI	21,146	KY	80,000	DC	81%	OK	13%	
NY	+1,729		GA	+9	UT	+23	NC	1,031,929	CH	20,467	MI	73,744	MN	80%	ID	13%	
+34,204			+200		+640		18,544,882			352,897		1,368,253					
All states	+56,077		+288		+611		All states	34,400,655	610,720		2,437,679		All states	70%	67%		
Top ten	61%		69%		105%		Top ten	54%	58%		56%		Median	73%	5%		

Some states not reporting

Five most improved US states

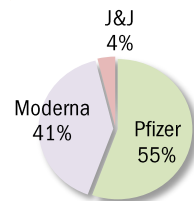
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
CA	-9,310	CA	-79	KY	-364	AK	+10 bp
WA	-2,562	WV	-12	AR	-57	AR	+10 bp
UT	-815	AR	-9	CH	-44	AZ	+10 bp
TX	-709	TN	-8	MO	-33	CA	+10 bp
FL	-695	PA	-5	MS	-24	CT	+10 bp



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	405,837,095				+1.933 million	US	48.6%	56.1%
Doses administered	350,199,532				+0.613 million	UK	54.2%	68.5%
Administered	One dose	% Pop	Immune	% pop	New immune today	France	44.1%	57.8%
Total population	192,319,034	58%	166,694,794	50%	+0.266 million	Spain	54.3%	65.2%
Age 12 to 17	10,087,207	40%	7,907,723	31%	+0.052 million	Germany	48.2%	60.2%
Age 18 to 64	131,530,620	65%	113,558,478	56%	+0.182 million	Italy	47.3%	61.6%
Age 65 and over	50,478,375	92%	45,099,176	82%	+0.032 million	Australia	12.5%	30.1%



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 **215 days** by Feb 24, 2022

61.4% of population >18 immunized
11.7% previously tested positive
73.2% vs 60% adult herd immunity*

Global data differs from sources, timing

AK
62.0%
50.9%
45.2%

ME
74.5%
67.8%
63.1%

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As of Jul 24

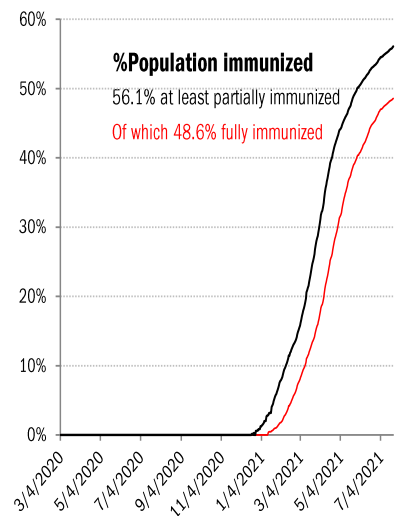
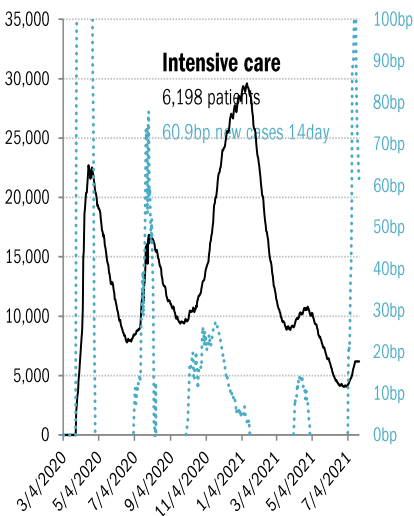
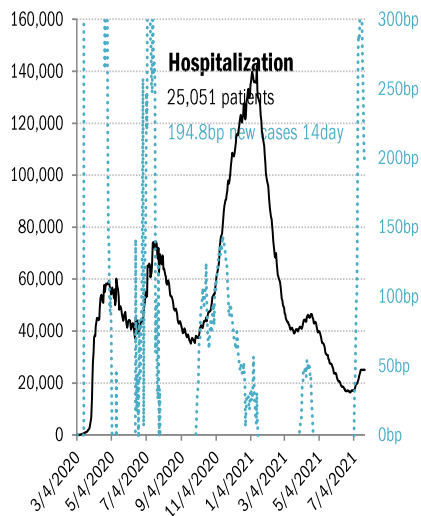
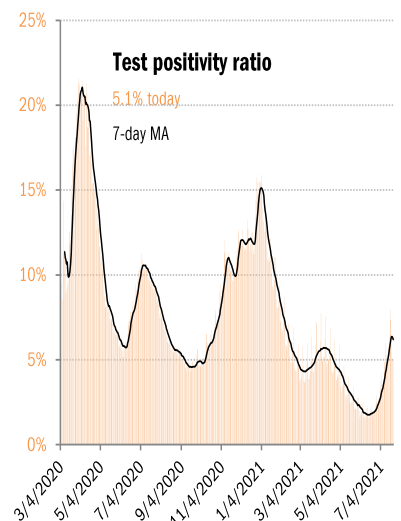
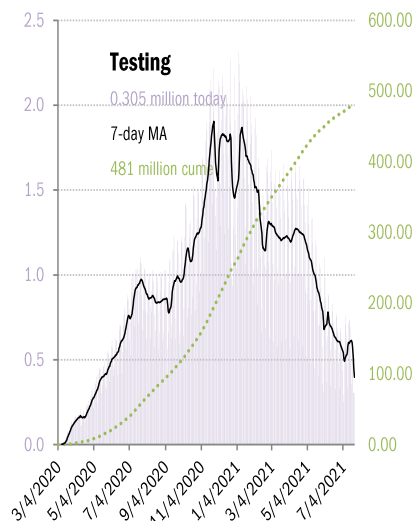
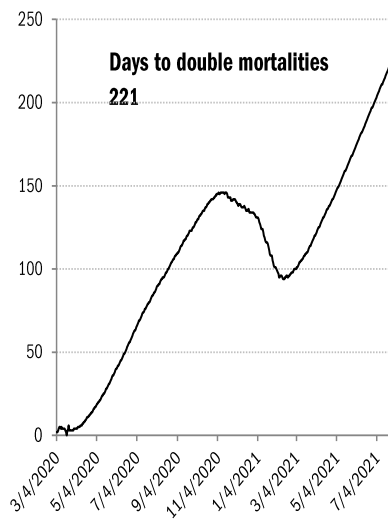
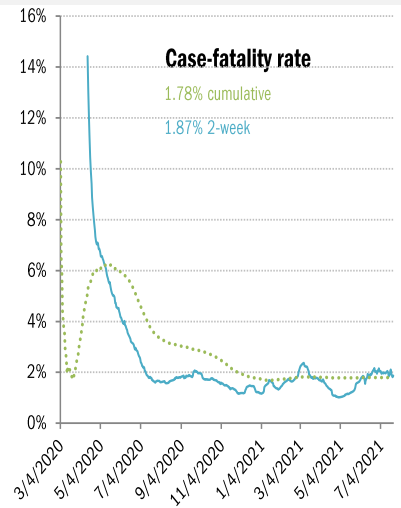
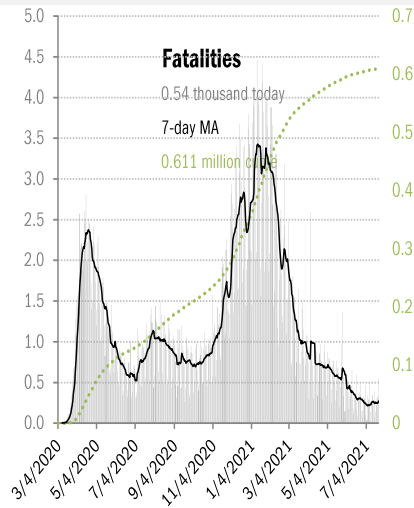
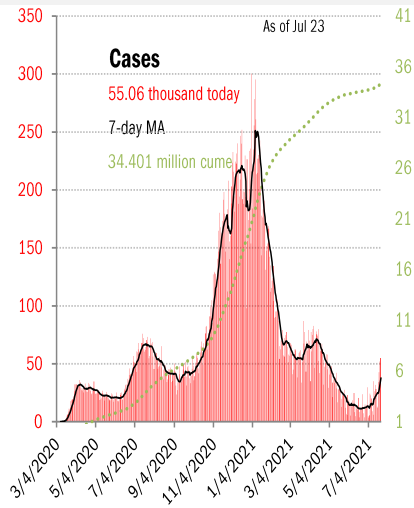
* Includes persons >18 fully immunized or previously tested positive, no overlap. Disregards untested positives, natural immunities.

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

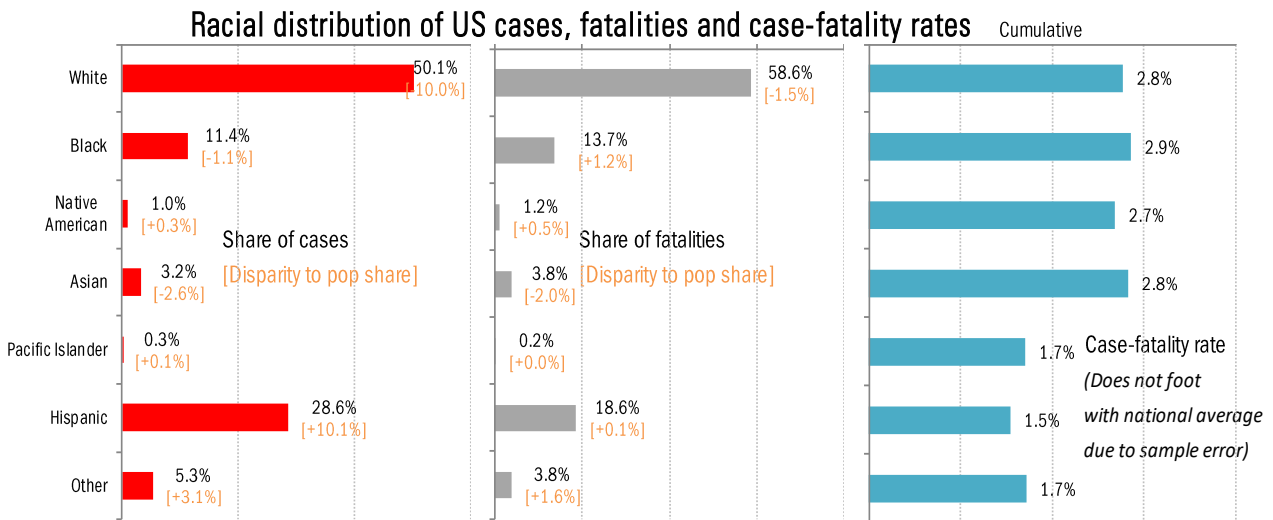
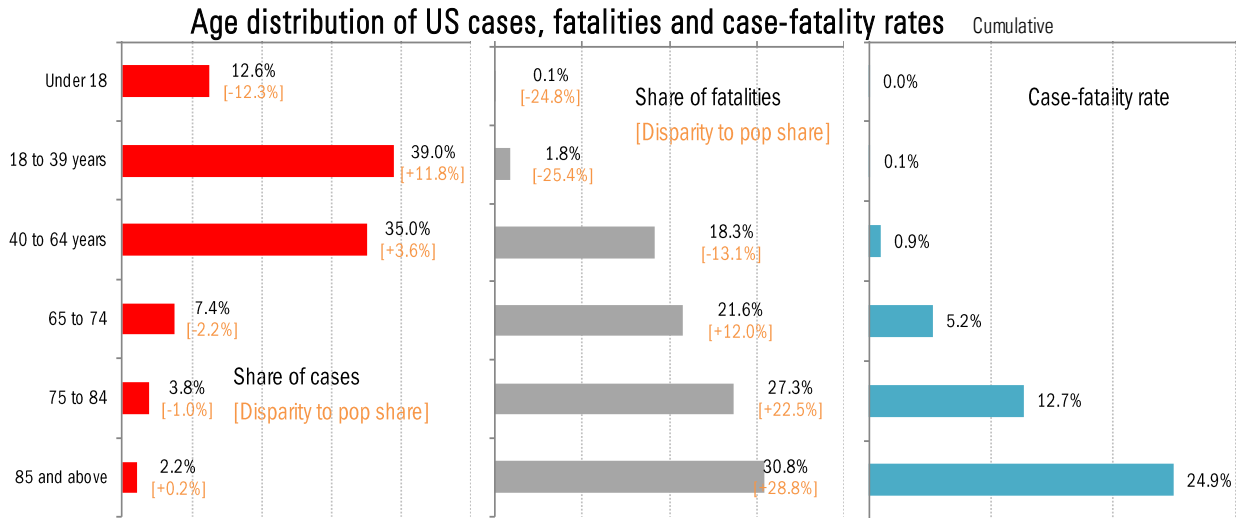
Source: [CDC](#), [CDC](#), [Our World in Data](#), TrendMacro calculations

US deep-dive

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

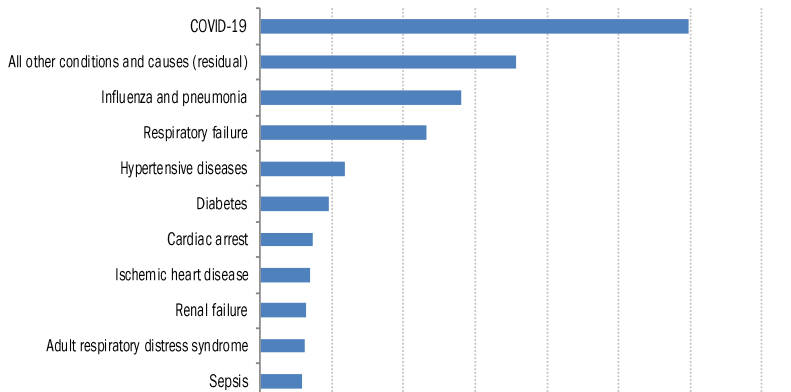


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations



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

[How Science Lost the Public's Trust](#)

Tunku Varadarajan
Wall Street Journal
July 23, 2021

[Effectiveness of COVID-19 vaccines against variants of concern in Ontario, Canada](#)

ProfileSharifa Nasreen et al.
medRxiv
July 16, 2021

[Biden administration not mandating COVID vaccines for White House staff, Psaki says](#)

Brooke Singman
Fox News
July 23, 2021

[Pressure mounts for DeSantis in Florida](#)

Max Greenwood
The Hill
July 22, 2021

[‘The workforce that’s returning is not the same’: As employees return to offices, they bring new addictions](#)

Lisa Schencker
Chicago Tribune
July 20, 2021

[China Rejects WHO Proposal for Second Phase of Covid-19 Origins Probe](#)

Chao Deng
Wall Street Journal
July 22, 2021

[London Staff Want Pay Rises to Return to Office, Survey Says](#)

Eamon Akil Farhat
Bloomberg
July 20, 2021

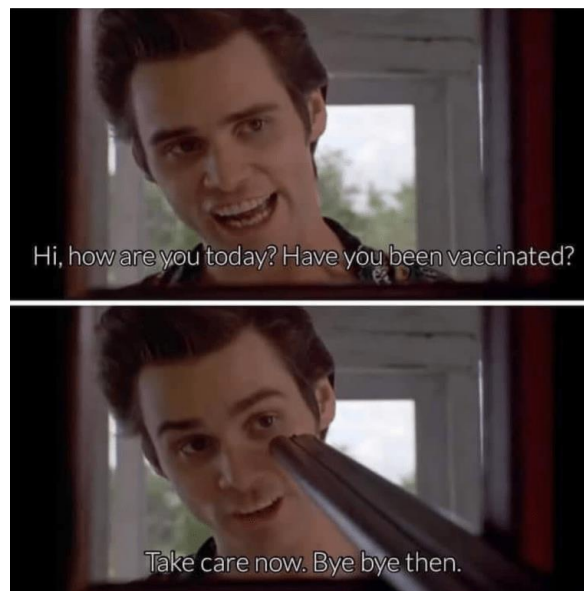
[L.A.'s Fully-Vaccinated People Made Up 1-in-5 Infections](#)

Linus Chua
Bloomberg
July 22, 2021

[Pfizer Shot Halts Severe Illness, Allows Infection in Israel](#)

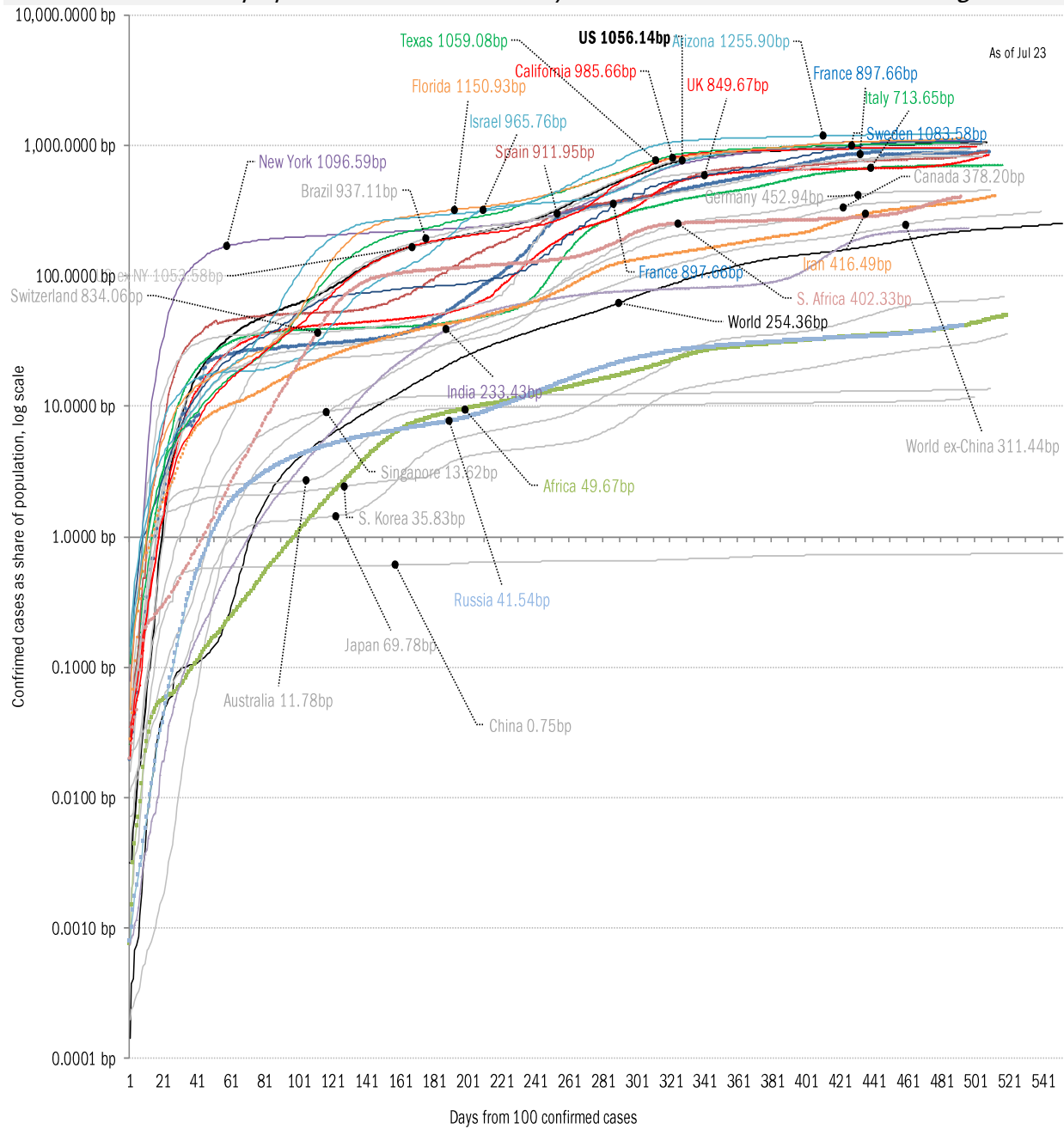
Yaacov Benmeleh
Bloomberg
July 23, 2021

Meme of the day



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

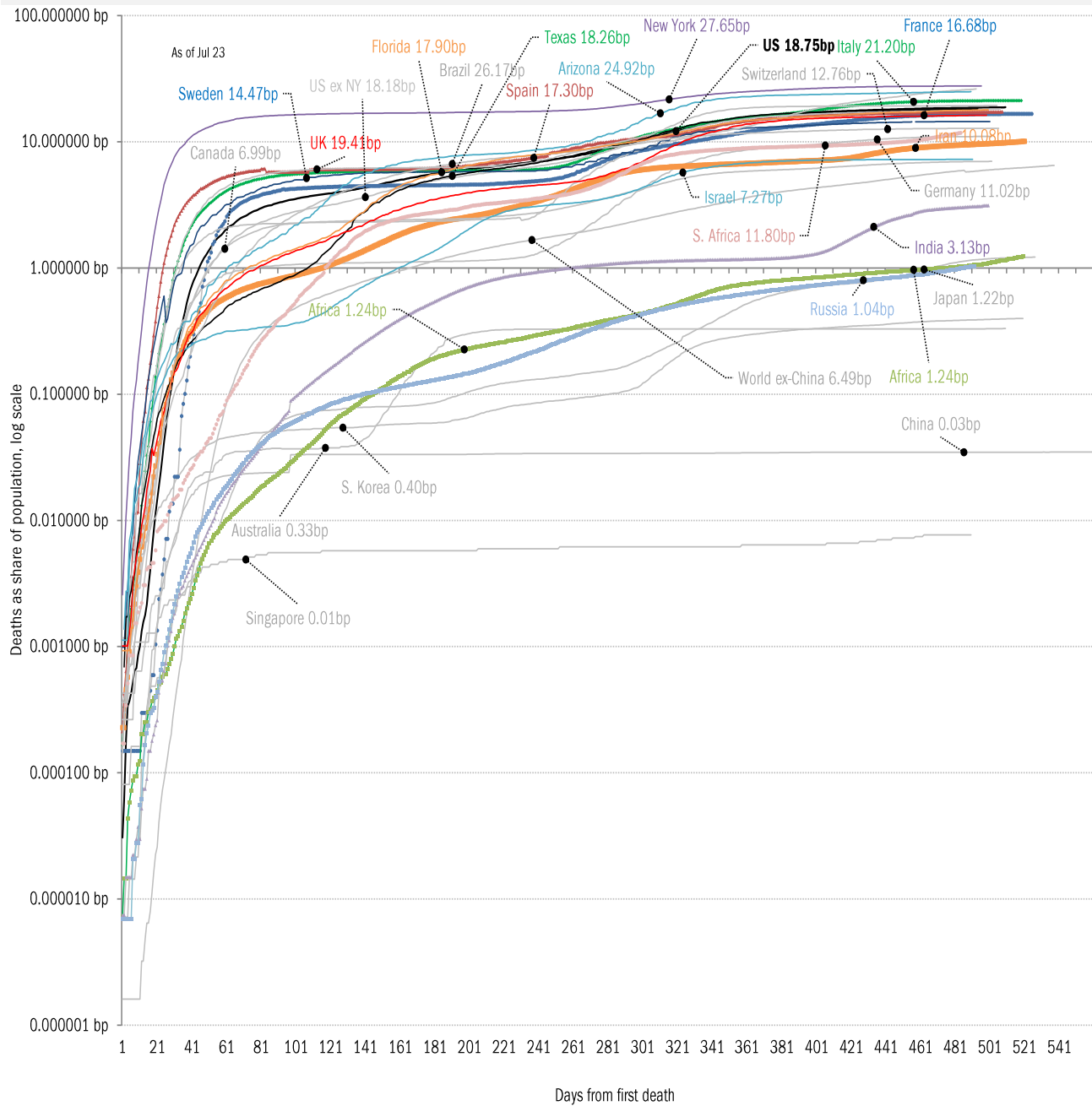
The coronavirus case accelerometer... tracking the world's infection curves
Share of infected population from first day with 100 confirmed cases, log scale



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

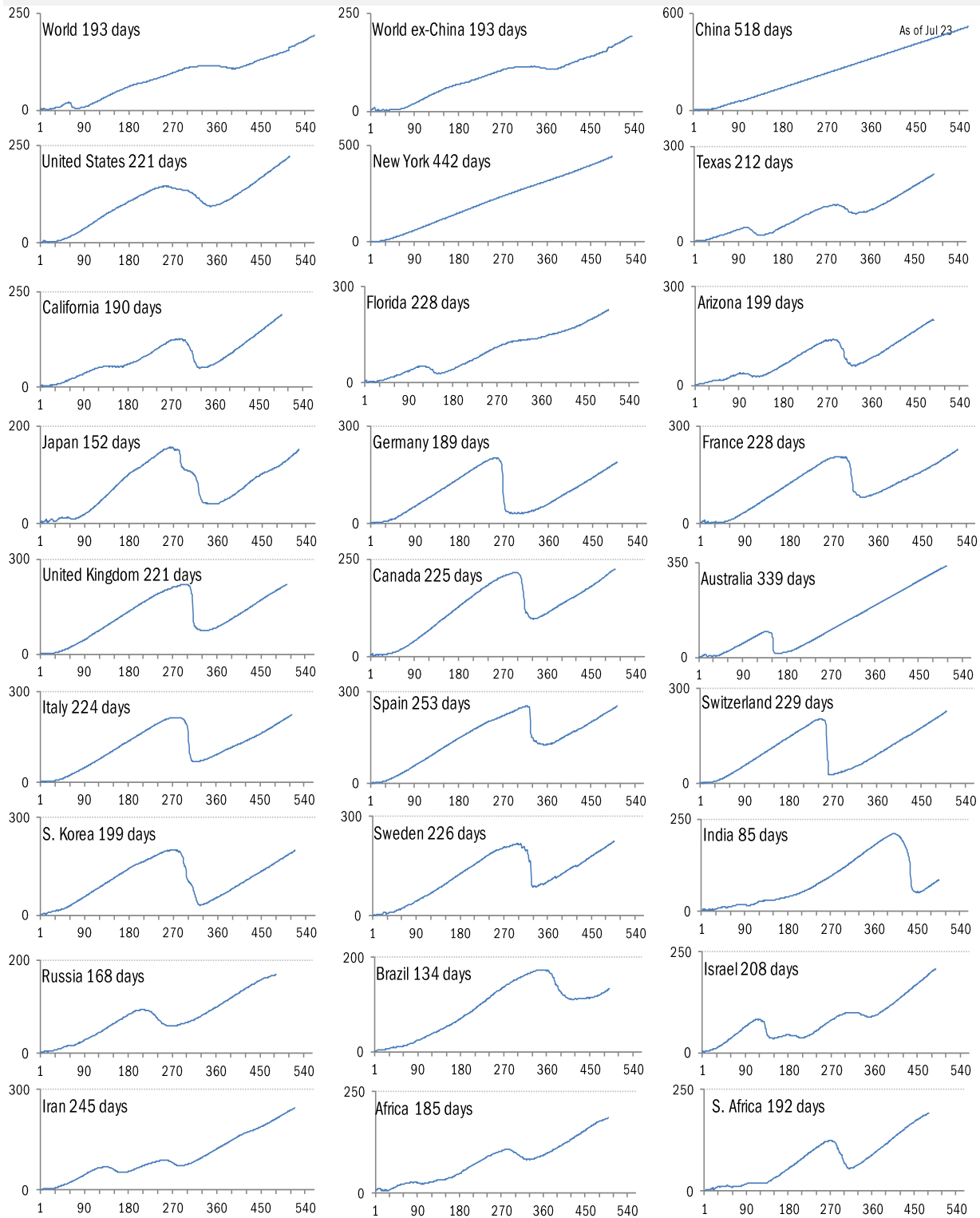


Source: [Johns Hopkins](#), TrendMacro calculations

"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

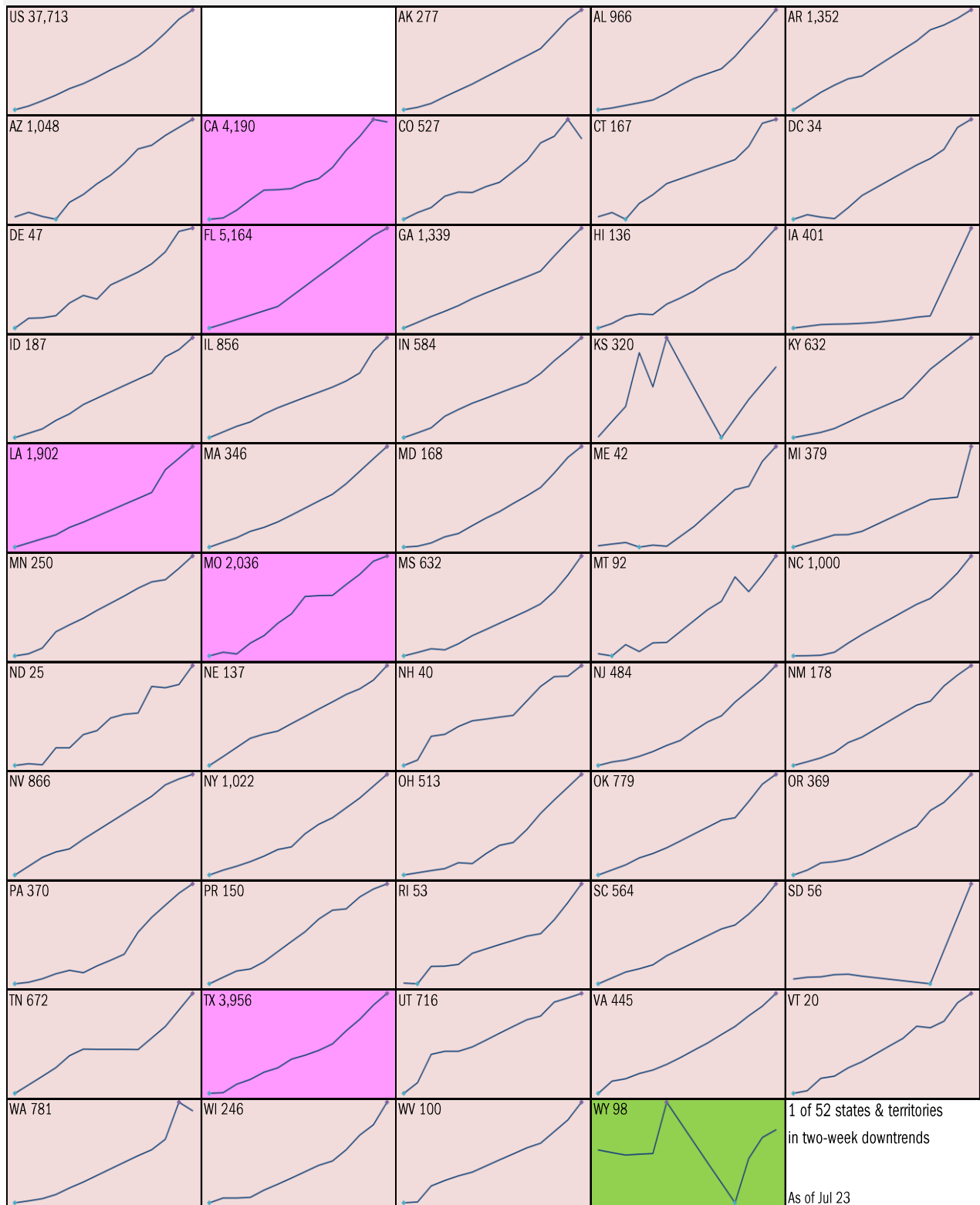


Source: [Johns Hopkins](#), TrendMacro calculations

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

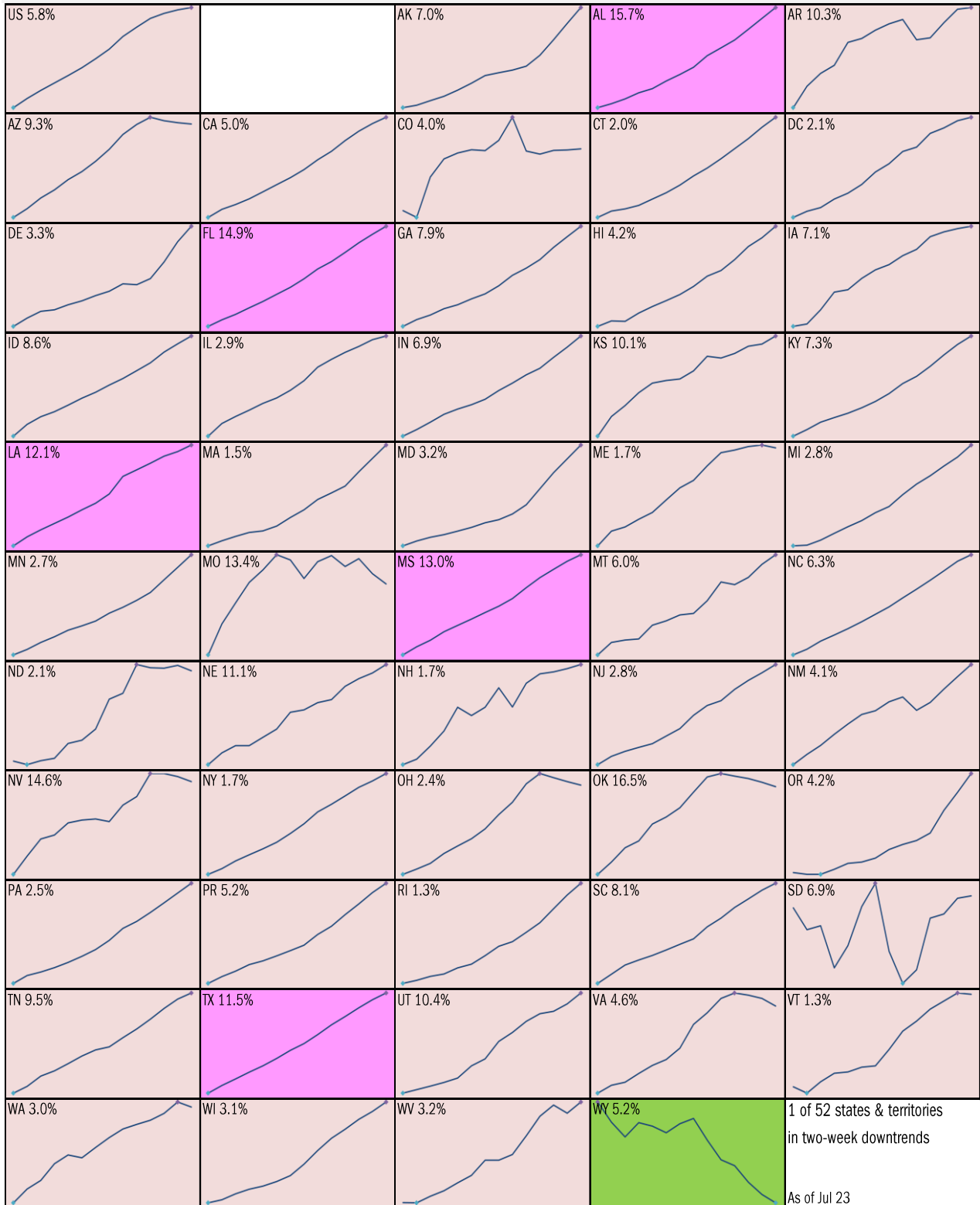


Source: [Johns Hopkins](#), TrendMacro calculations

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

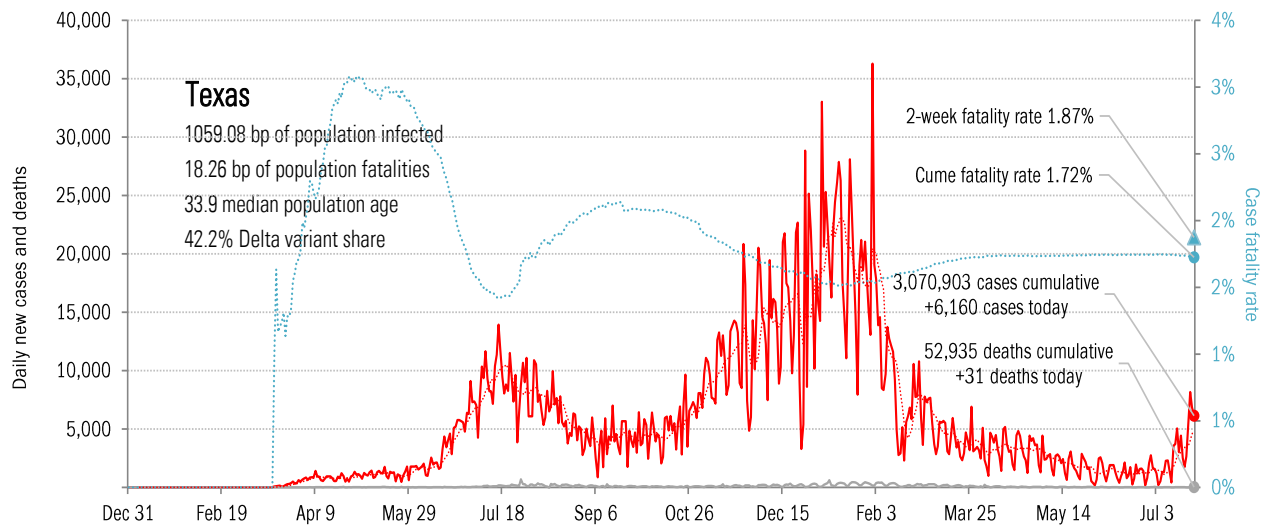
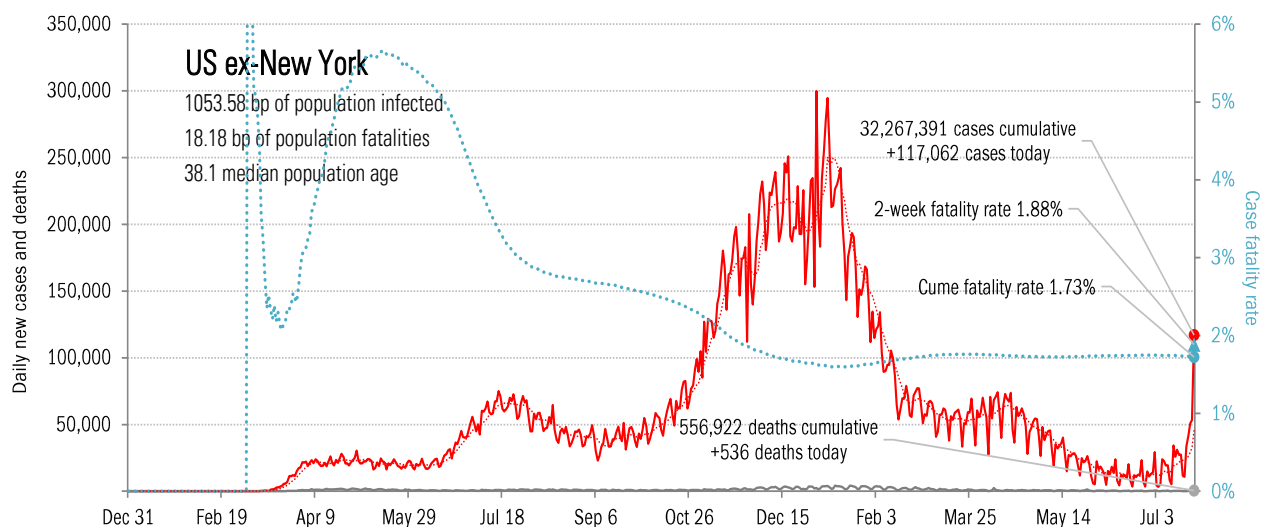
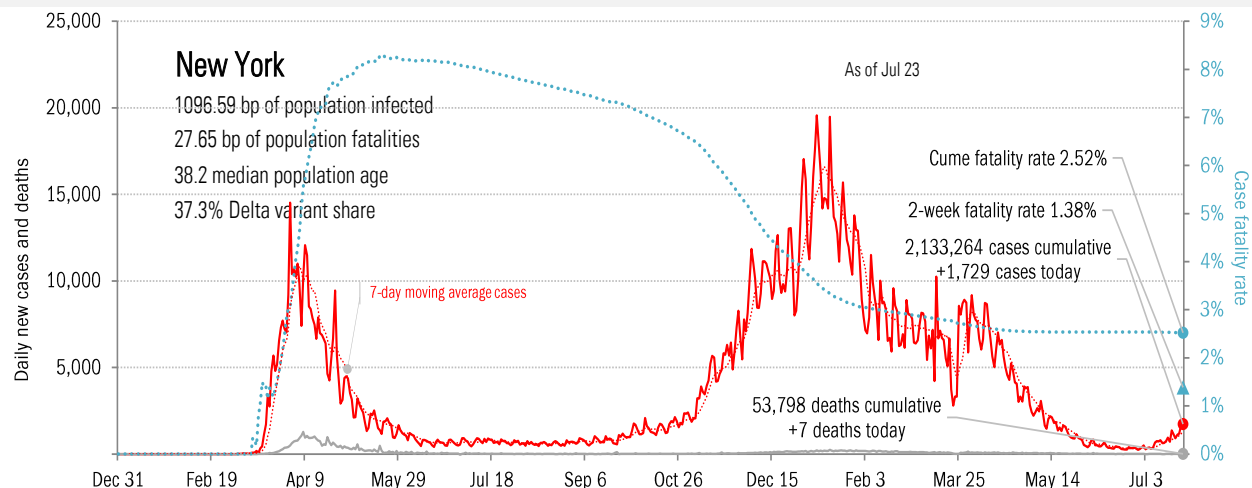
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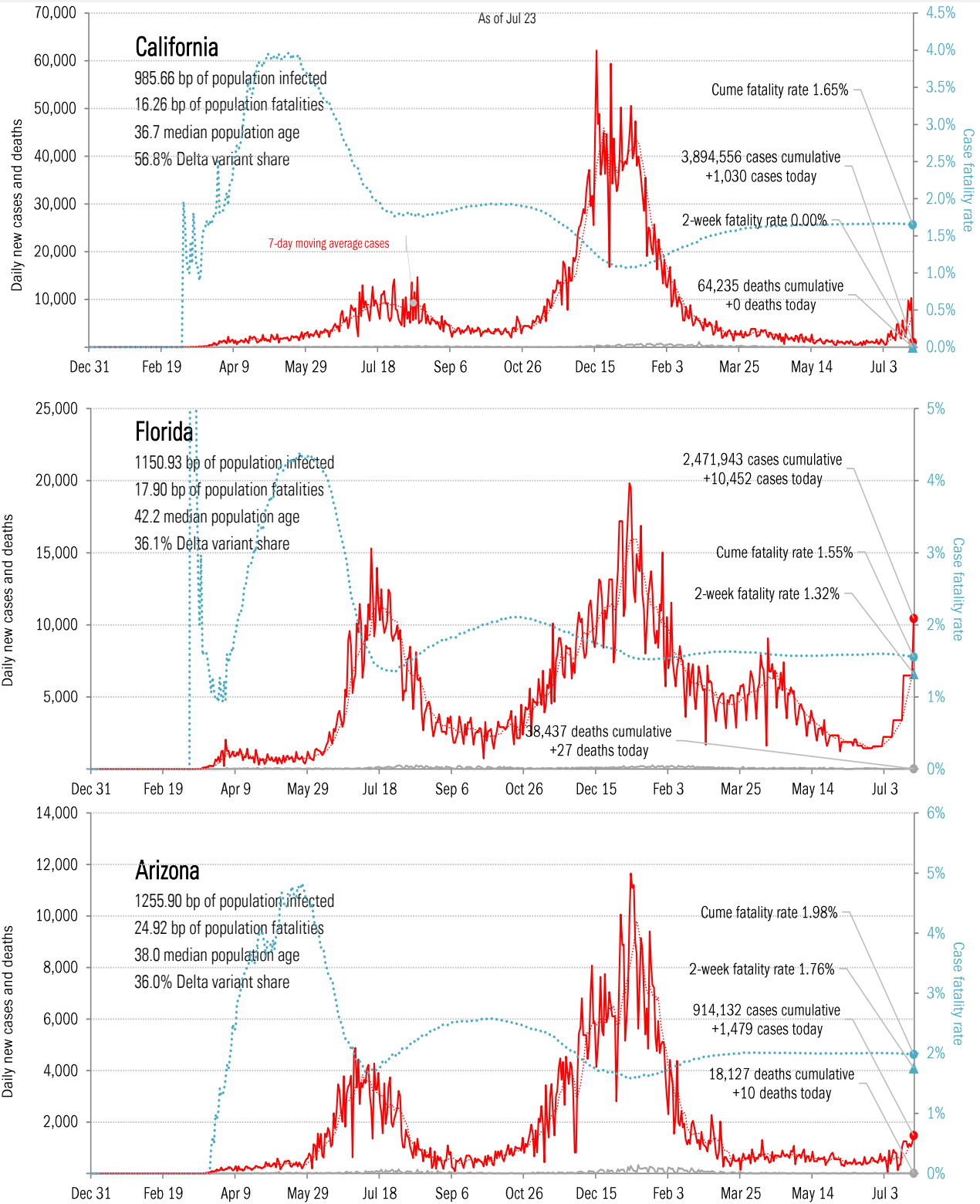
Source: [Covid Act Now](#), TrendMacro calculations

From Ground Zero to the Rio Grande



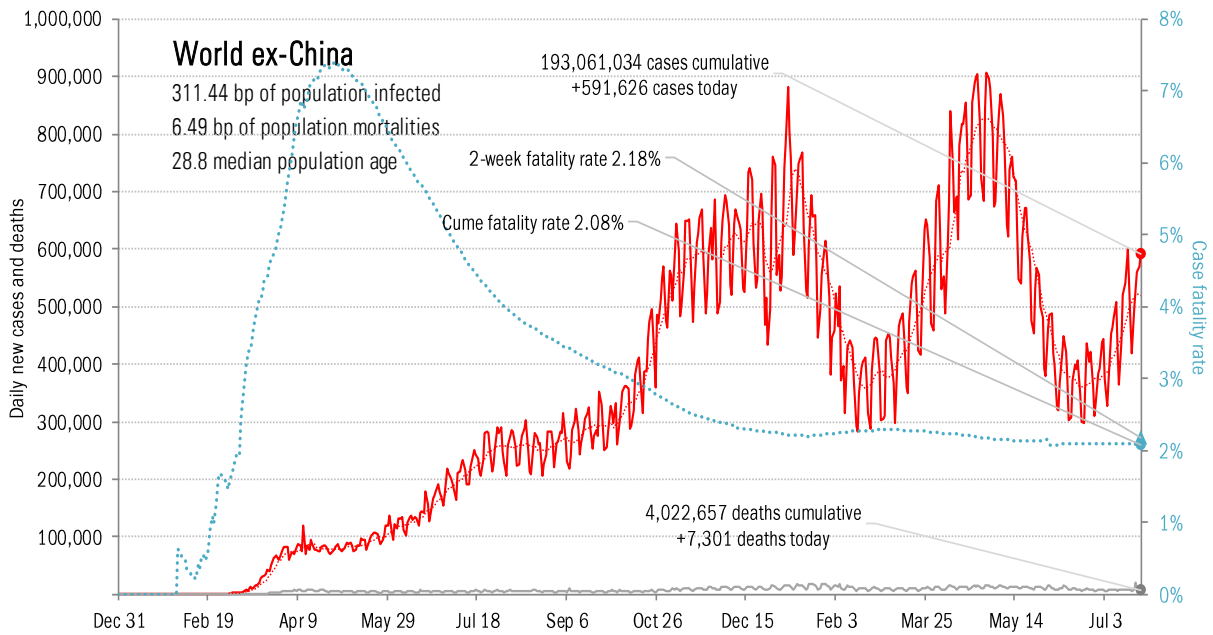
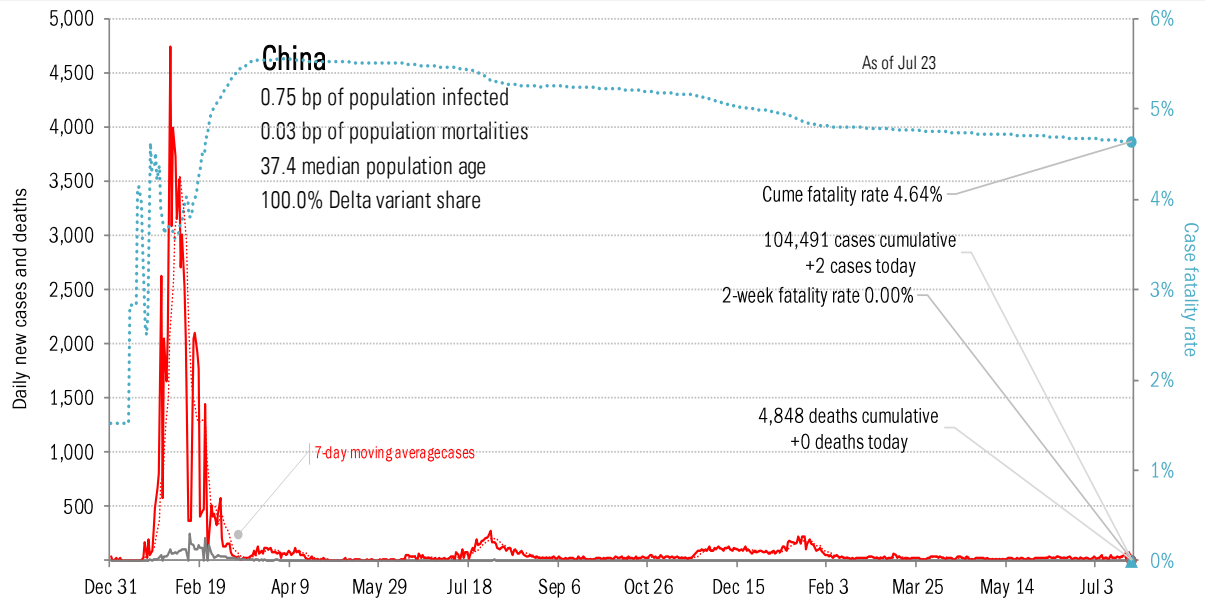
Source: [Johns Hopkins](#), TrendMacro calculations

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



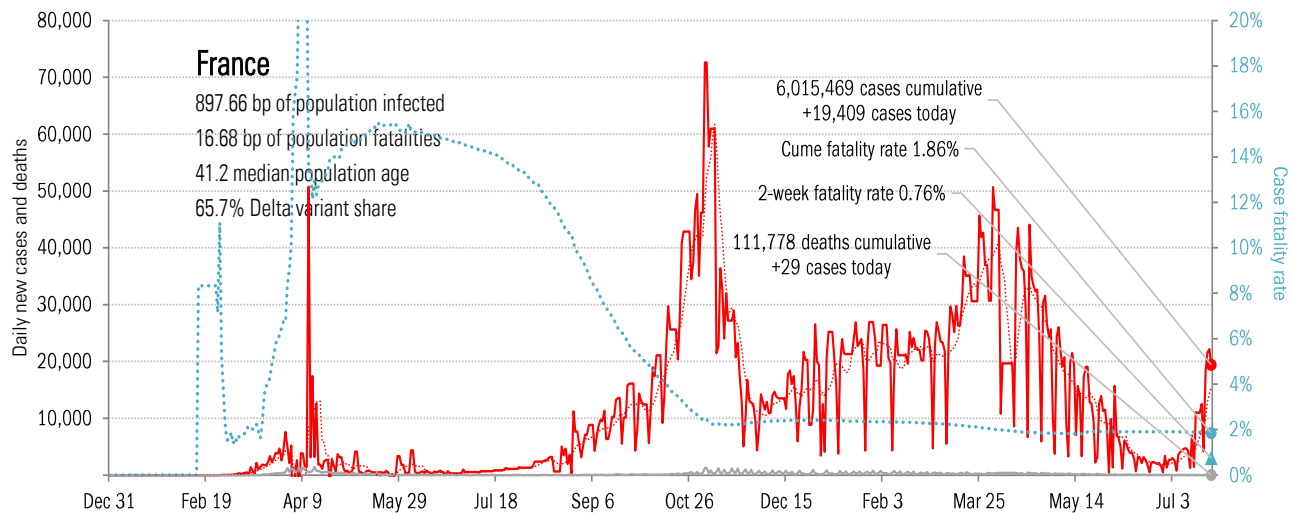
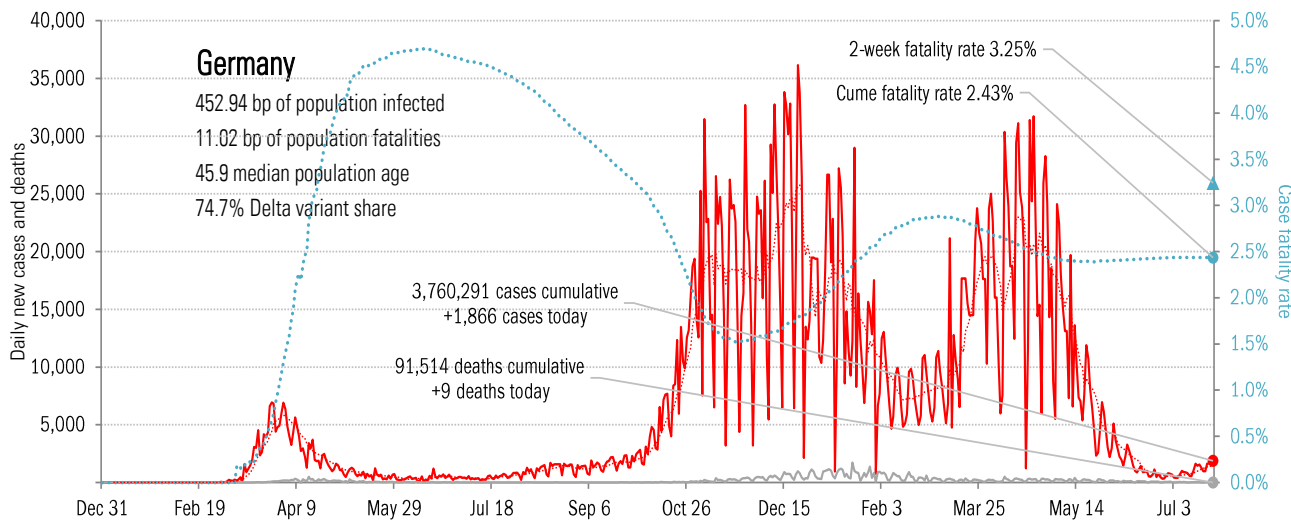
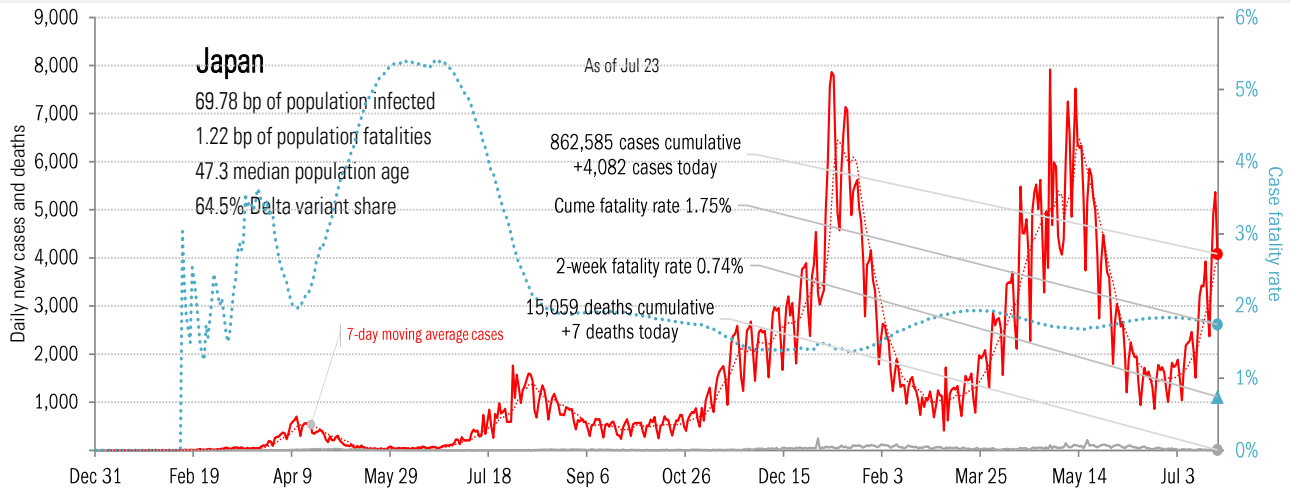
Source: [Johns Hopkins](#), TrendMacro calculations

Patient zero... and then everyone else



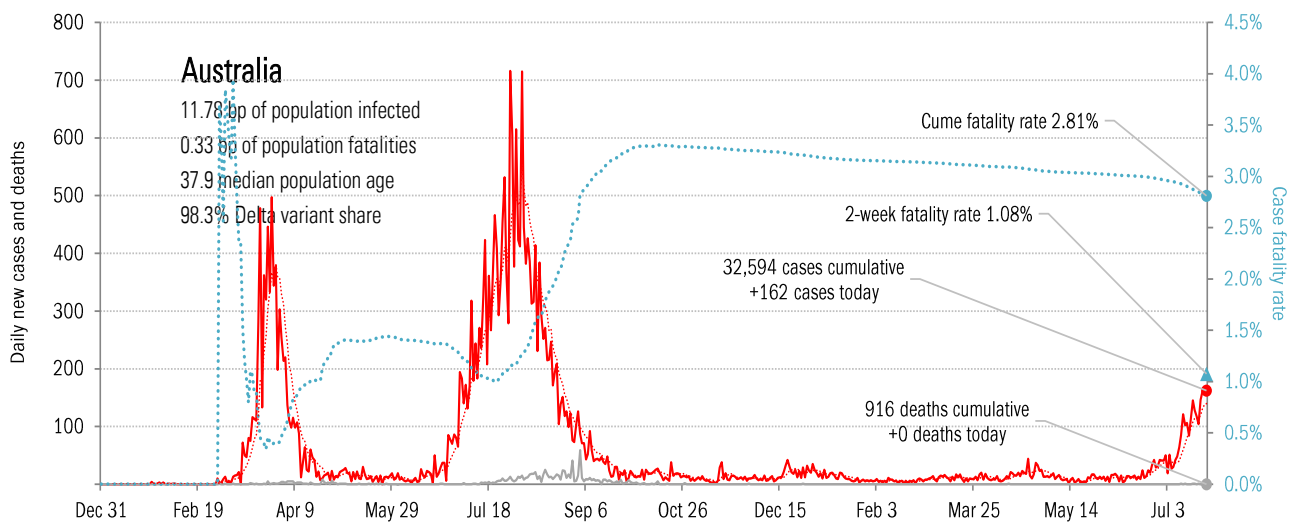
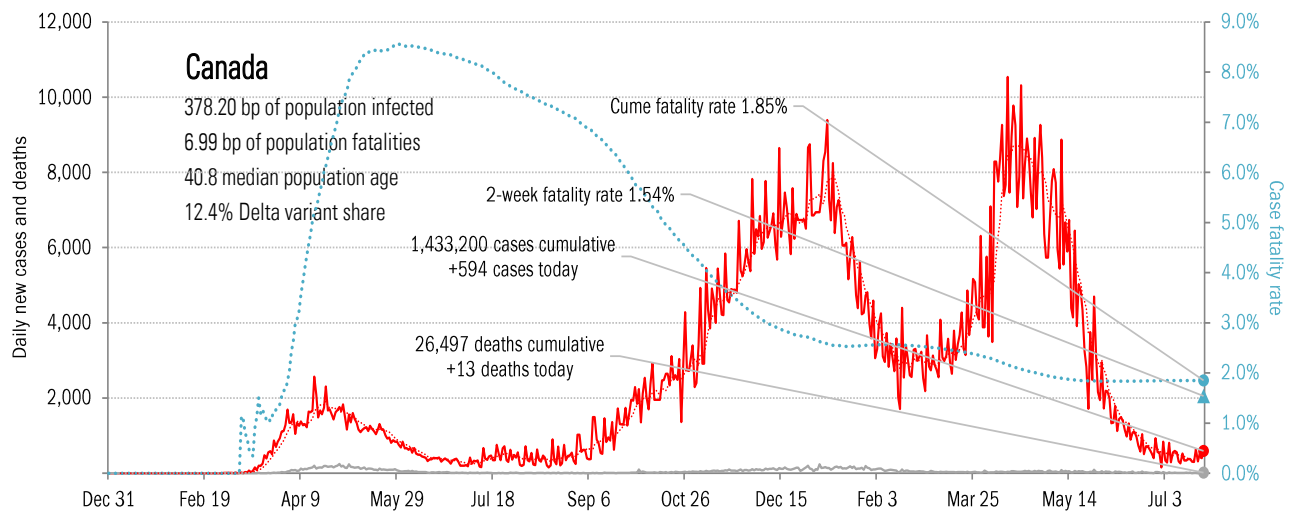
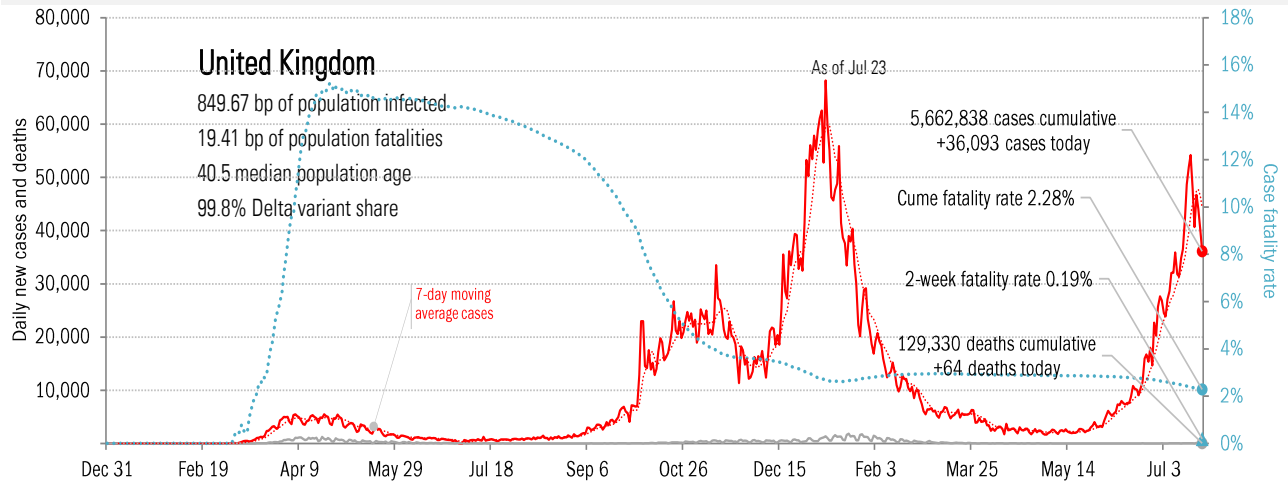
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the largest economies



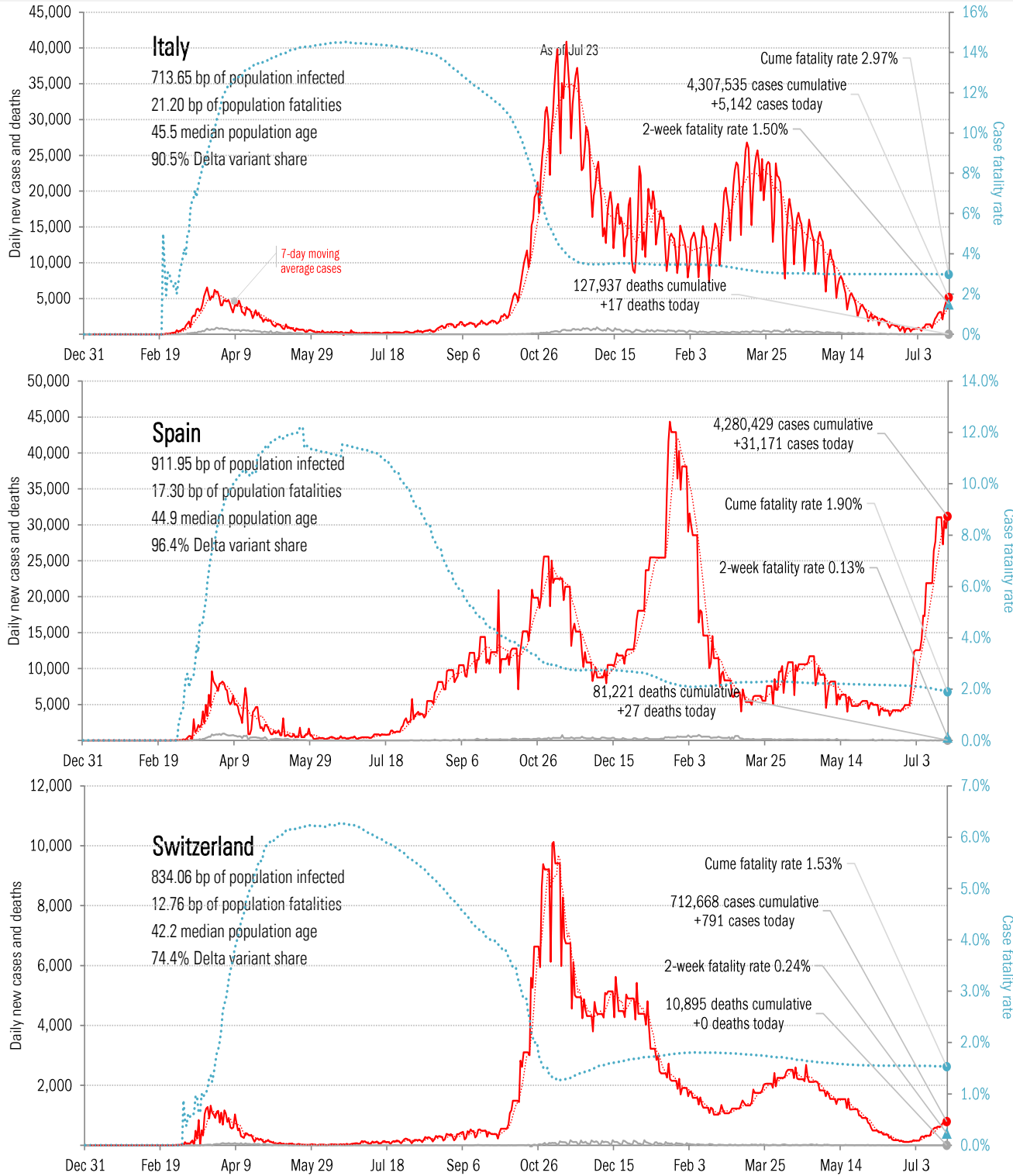
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in The Anglosphere



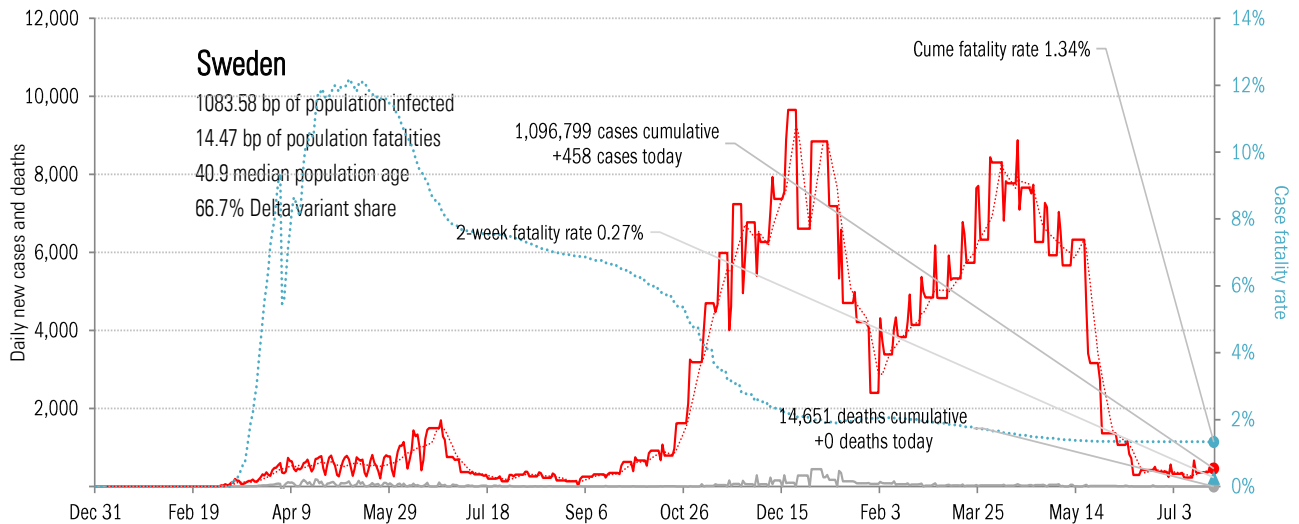
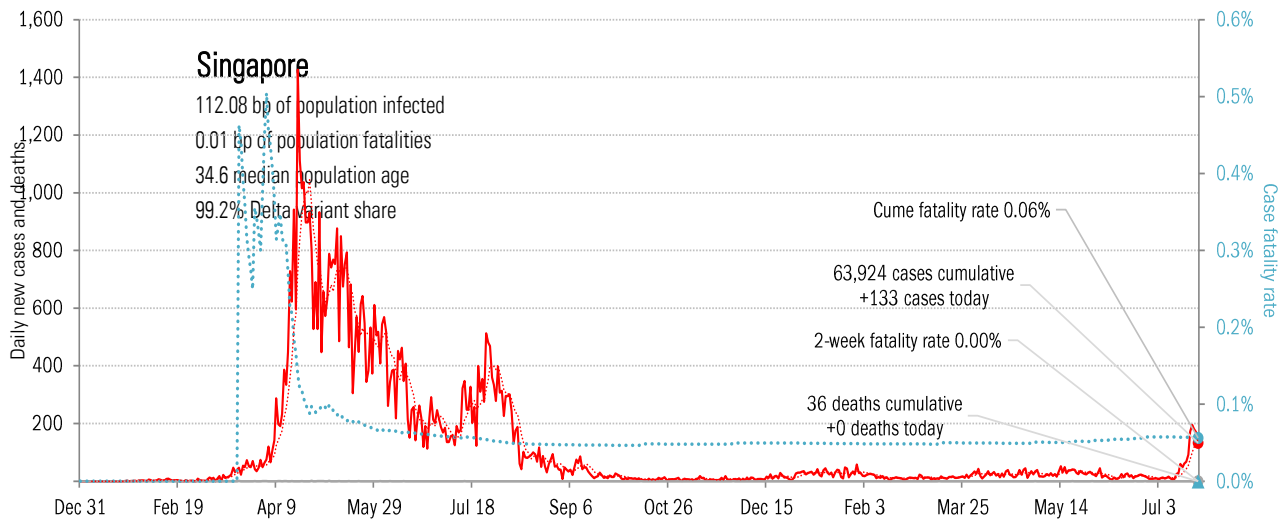
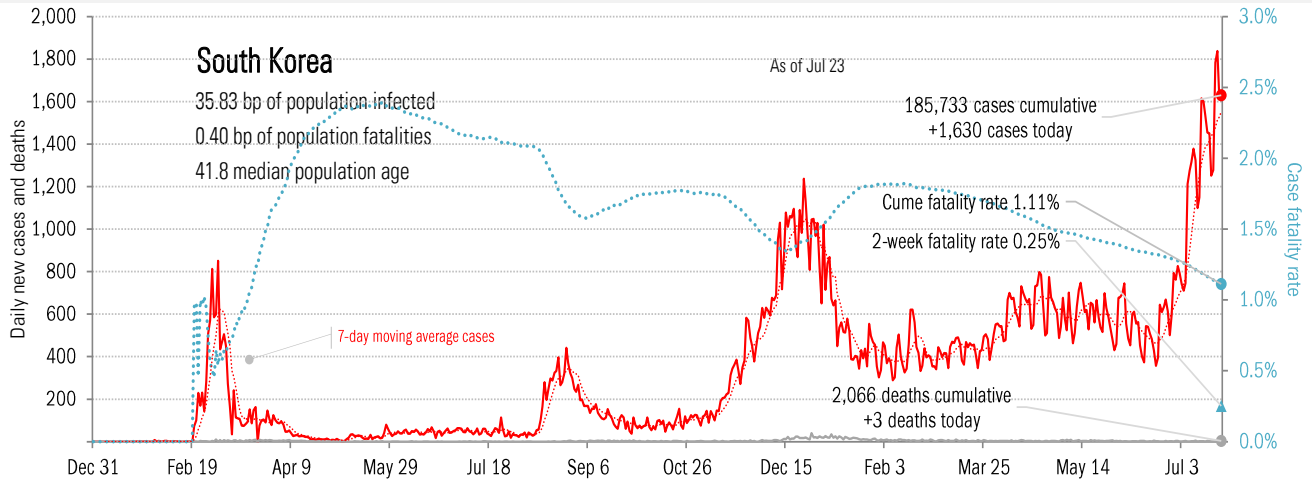
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in continental Europe



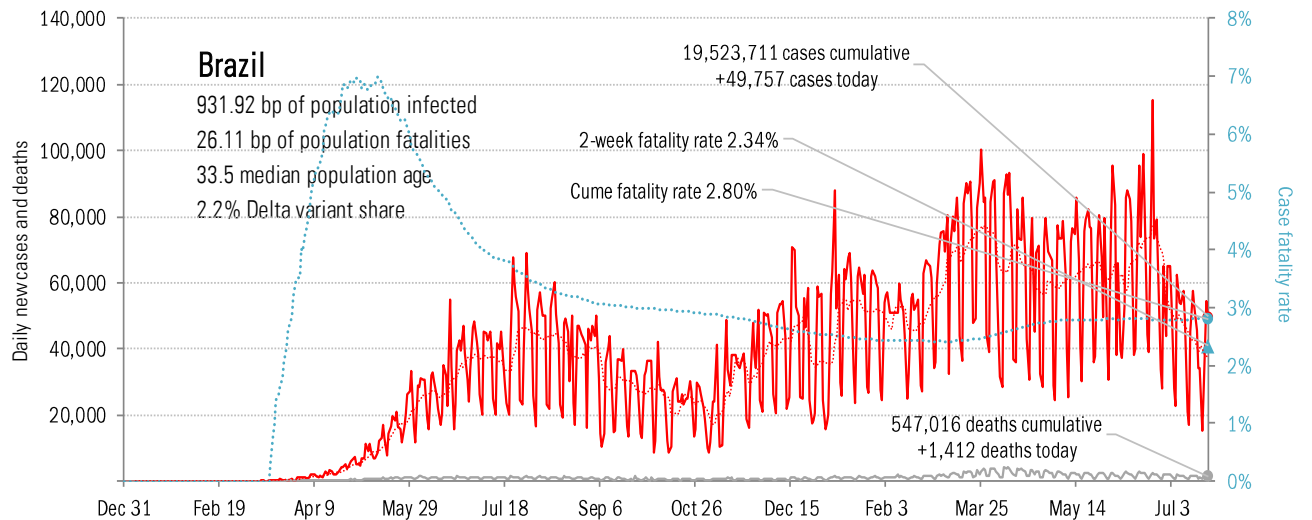
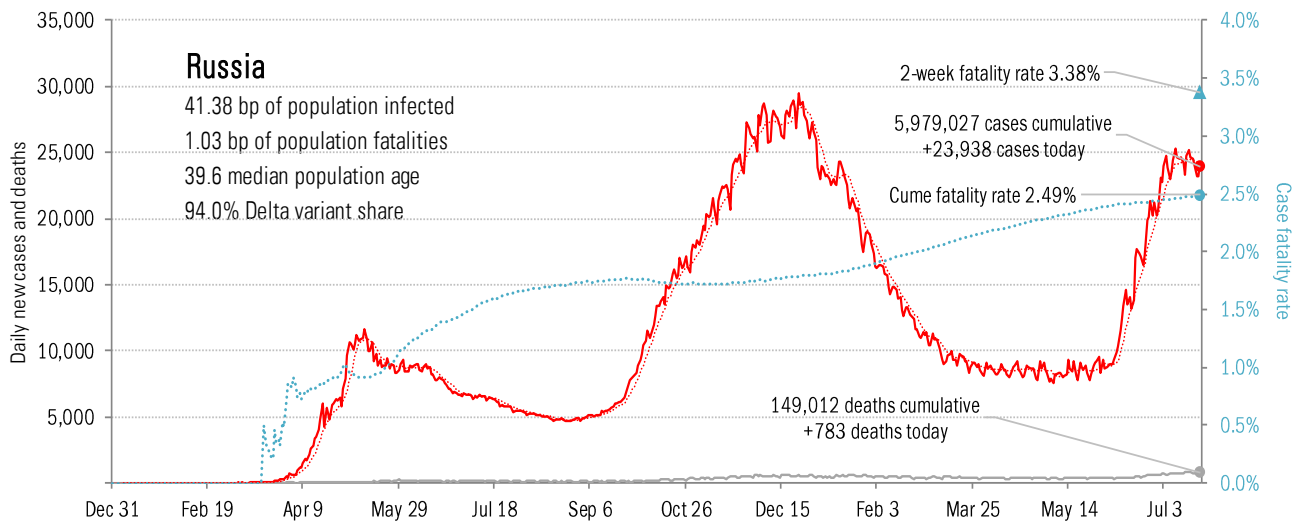
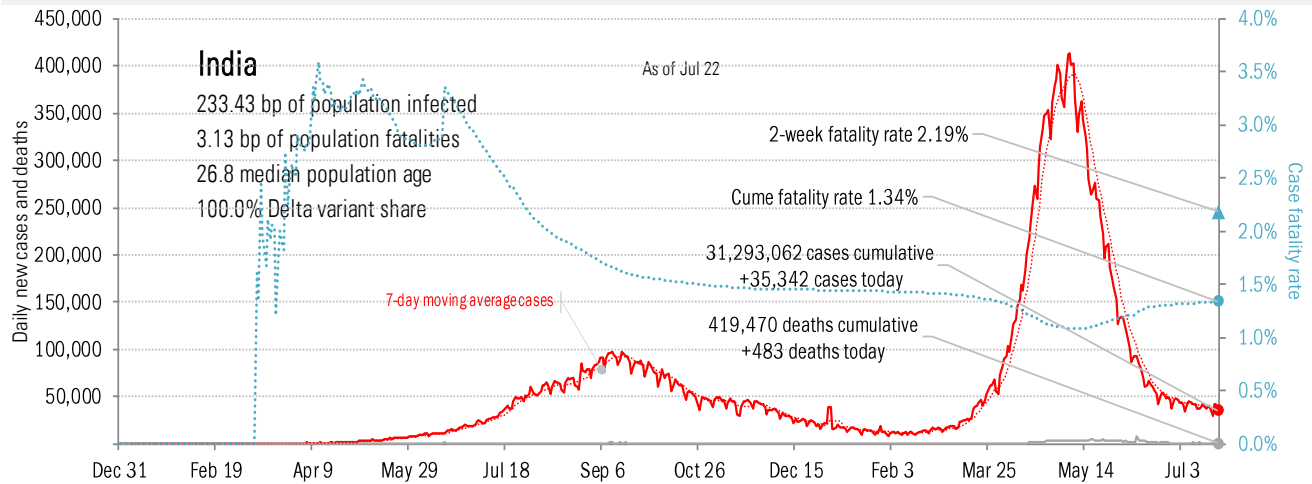
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in other hot-spots



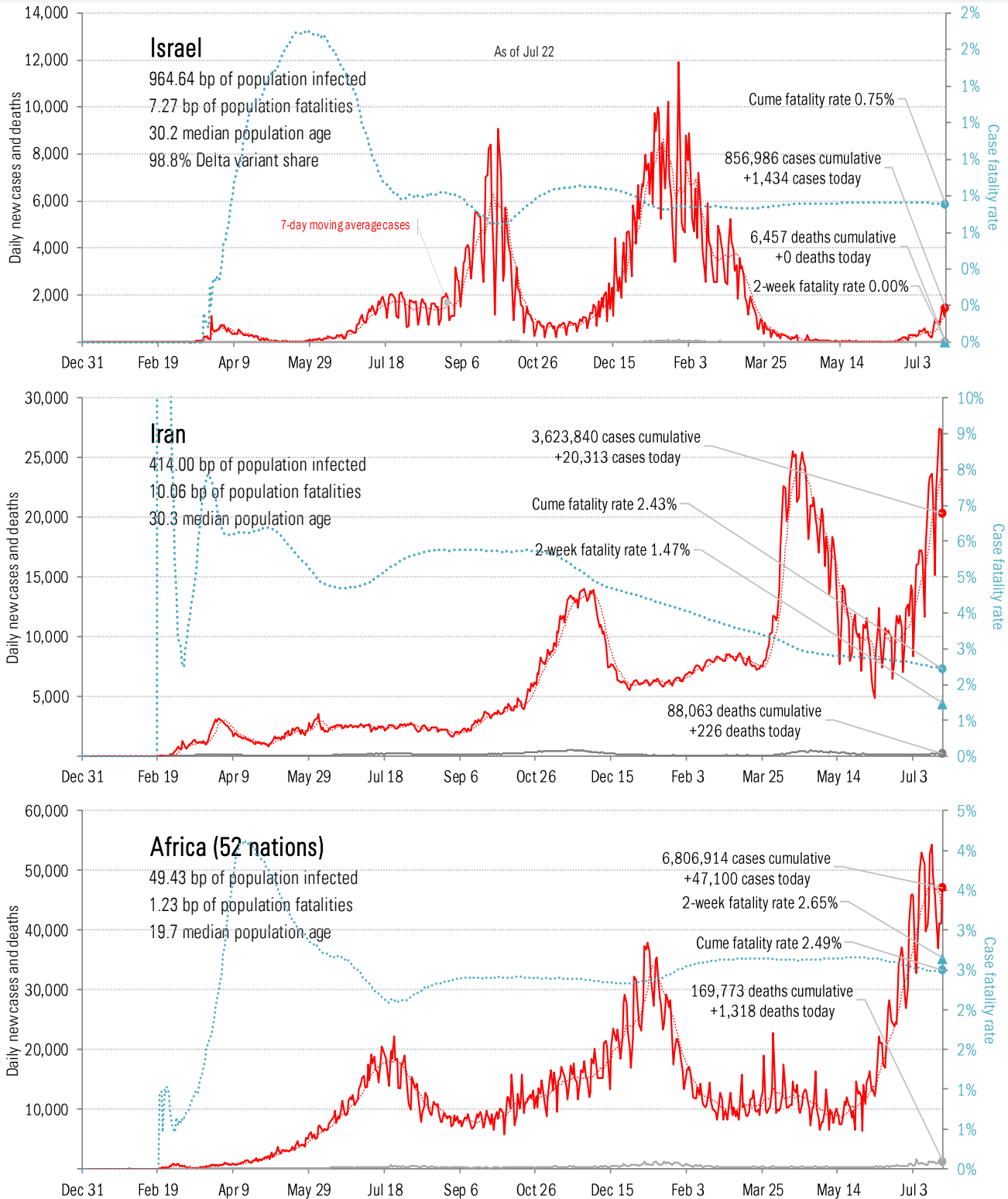
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the BRICs ex-China



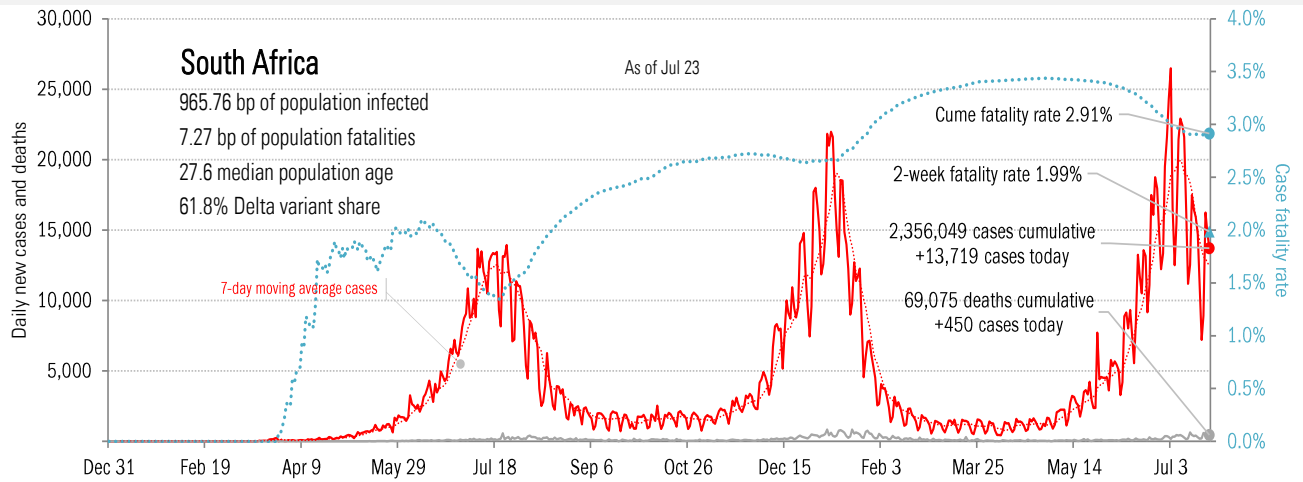
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the Middle East and Africa



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

Impact in Africa, continued



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