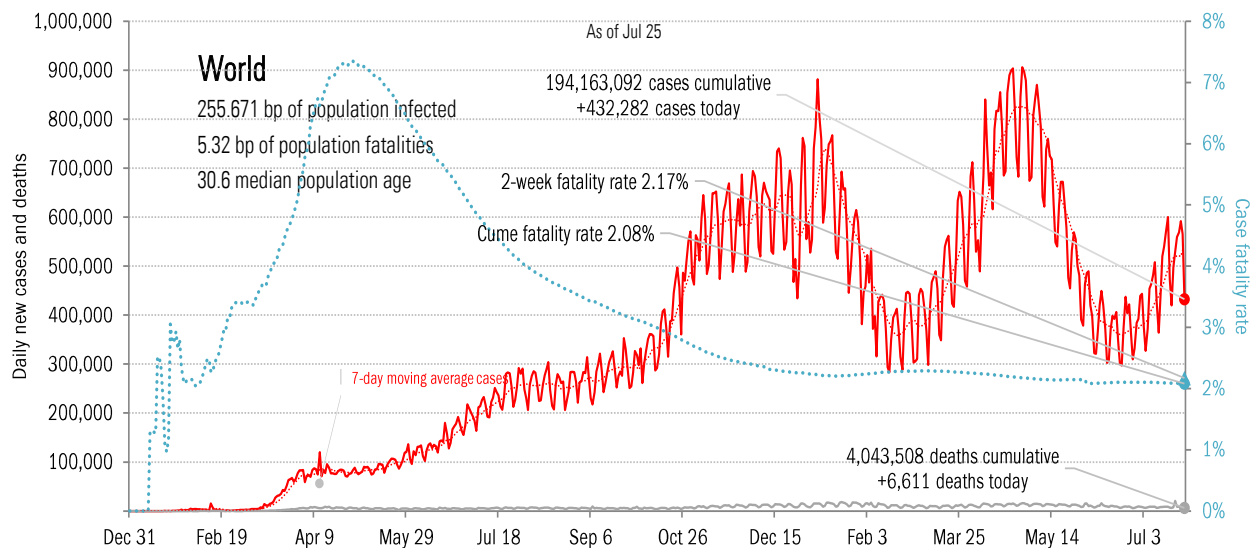
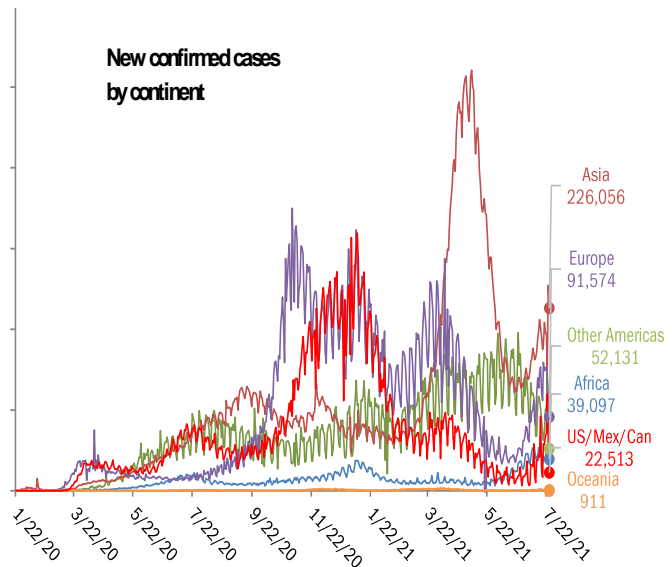


Data Insights: Covid-2019 Monitor

Monday, July 26, 2021

The global scorecard

The worst ten countries			
New cases		New Deaths	
India	+39,361	Indonesia	+1,266
Indonesia	+38,679	Russia	+769
United Kingdom	+28,937	Brazil	+476
Iran	+27,146	India	+416
Russia	+23,517	Burma	+355
Brazil	+18,129	Colombia	+330
Malaysia	+17,045	South Africa	+287
United States	+15,711	Iran	+268
Thailand	+15,335	Tunisia	+231
France	+15,242	Bangladesh	+228
+239,102		+4,626	
World	+432,282	World	+6,611
Top ten	55%	Top ten	70%



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

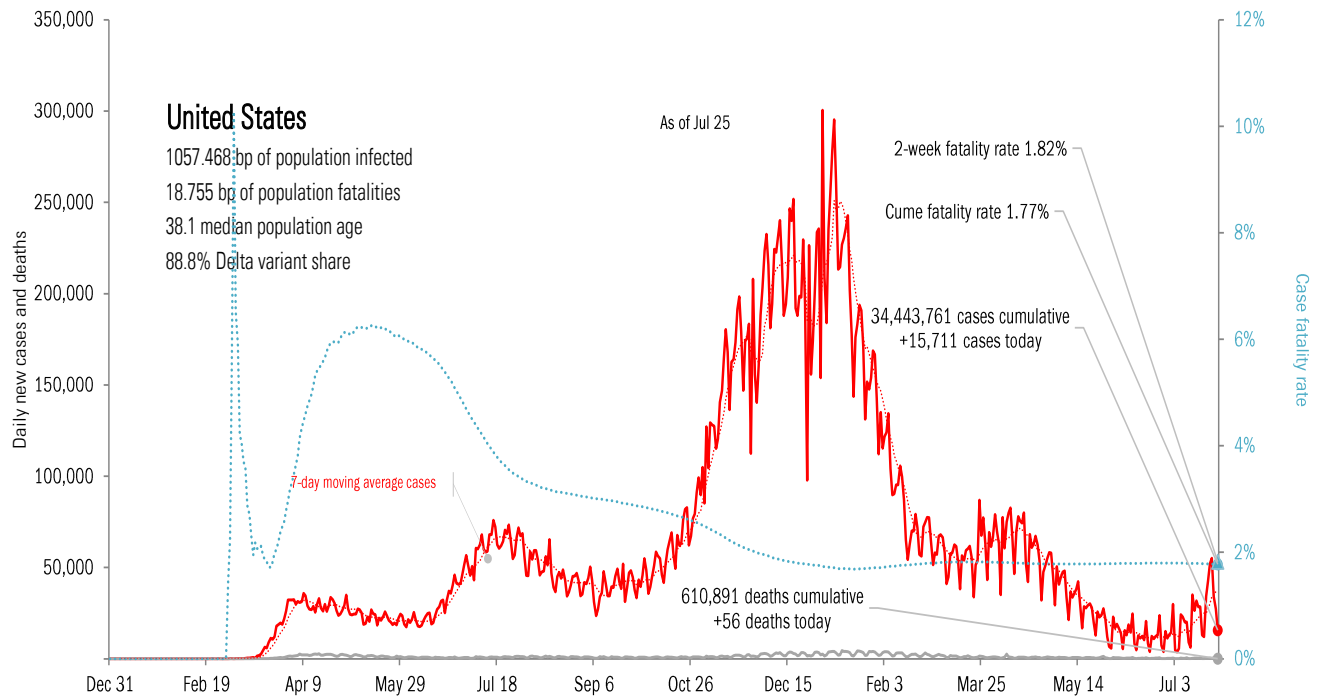
The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
FL	+10,452		FL	+56		FL	+433		CA	3,905,990		CA	64,235		TX	264,374		RI	94%	MO	30%
CA	+2,938		FR	+15		KY	+247		TX	3,077,513		NY	53,813		CA	247,246		MA	85%	AR	27%
FR	+2,792		TX	+12		GA	+196		FL	2,499,340		TX	53,018		FL	203,472		MO	84%	NV	24%
AL	+1,536		NY	+9		TX	+182		NY	2,136,032		FL	38,555		NY	138,130		MD	84%	FL	23%
MO	+1,531		AR	+6		CA	+125		IL	1,407,929		PA	27,827		GA	112,999		FL	83%	UT	22%
AZ	+1,508		CA	+4		AL	+86		PA	1,224,390		NJ	26,575		PA	92,705		GA	82%	MS	22%
TX	+1,398		PA	+4		LA	+80		GA	1,157,705		IL	25,834		CH	89,345		PA	81%	TX	18%
AR	+1,022		HI	+2		NC	+50		CH	1,122,104		GA	21,614		IL	84,235		NV	80%	OK	18%
NY	+871		NJ	+2		AR	+40		NJ	1,033,712		MI	21,146		KY	81,212		CT	80%	AK	17%
NJ	+596		AZ	+1		MO	+37		NC	1,031,929		CH	20,467		MI	74,003		MN	79%	WY	15%
+24,644			+111			+1,476			18,596,644			353,084			1,387,721						
All states	+26,163			+112			+1769		All states	34,443,761			610,891			2,470,591		All states	70%		67%
Top ten	94%			99%			83%		Top ten	54%			58%			56%		Median	73%		8%

Some states not reporting

Five most improved US states

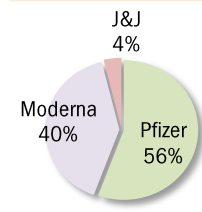
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
CA	-5,558	AZ	-25	NV	-55	FL	+30 bp
TX	-3,814	TX	-12	AZ	-49	OR	+20 bp
MO	-1,707	WA	-12	KS	-36	TX	+20 bp
NY	-1,026	AL	-11	UT	-28	AR	+10 bp
AR	-993	MO	-10	TN	-23	AZ	+10 bp



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

Rolling out the vaccines in the US and the world

Administered	Cumulative		Today		Immunity	Full	Partial	
Doses	351,679,122		+0.793 million		US	48.8%	56.4%	
	One dose	% Pop	Immune	% pop	New immune today	UK	54.7%	68.6%
Total population	193,223,310	58%	167,294,414	50%	+0.305 million	France	44.1%	57.8%
Age 12 to 17	10,242,894	41%	8,016,157	32%	+0.056 million	Spain	54.3%	65.2%
Age 18 to 64	132,179,494	65%	113,976,601	56%	+0.210 million	Germany	49.0%	60.5%
Age 65 and over	50,577,853	92%	45,172,131	83%	+0.039 million	Italy	48.3%	61.9%



State
At least partial immunity as % population
Full immunity as % population



Every American >18 immune in **166 days** by Jan 6, 2022
 61.6% of population >18 immunized
 11.7% previously tested positive
73.4% vs 60% adult herd immunity*

Australia	13.1%	30.6%
Israel	61.3%	66.6%
Canada	55.2%	70.9%
Japan	24.9%	36.6%
Africa	1.6%	3.1%
India	6.8%	24.8%
Brazil	17.5%	46.4%

AK
51.0%
45.2%

WI
55.2%
51.5%

As of Jul 25

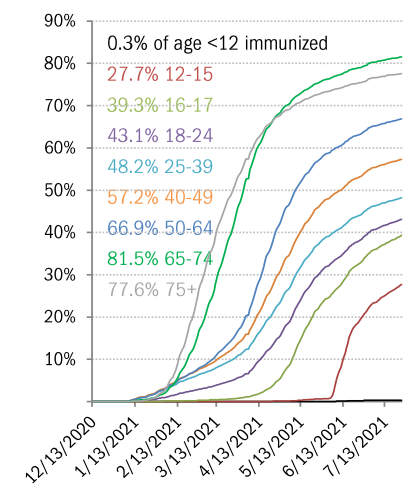
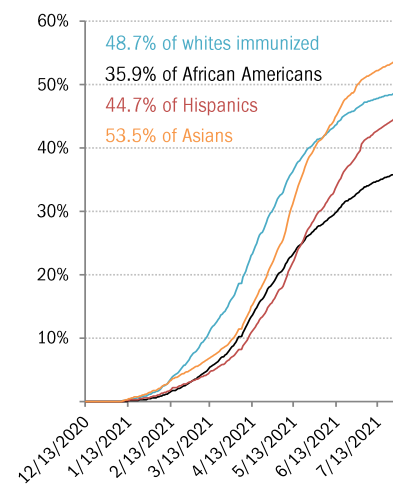
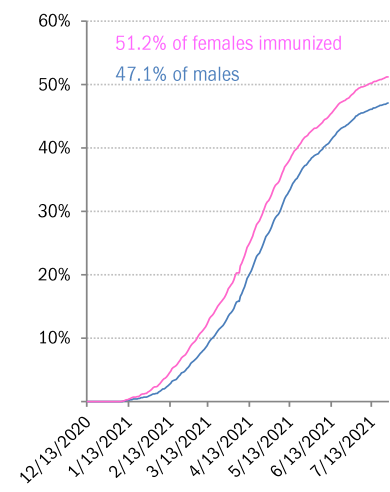
China NA

ME
67.9%
63.2%

WA 63.4% 57.2%	ID 40.7% 37.2%	MT 48.9% 44.1%	ND 45.1% 39.9%	MN 58.4% 53.5%	IL 61.6% 48.1%	MI 52.8% 48.6%	NY 62.3% 56.6%	VT 75.2% 67.3%	NH 64.3% 58.0%	
OR 60.2% 55.7%	NV 52.7% 43.9%	WY 41.2% 36.3%	SD 52.1% 46.6%	IA 52.7% 49.3%	IN 46.7% 43.9%	OH 49.4% 46.2%	PA 64.9% 51.8%	NJ 65.2% 57.7%	MA 72.1% 63.5%	
CA 64.1% 52.3%	UT 51.3% 44.2%	CO 59.7% 54.0%	NE 53.3% 49.2%	MO 47.8% 40.8%	KY 51.4% 45.2%	WV 45.9% 38.9%	VA 61.1% 54.1%	MD 64.1% 58.4%	CT 69.2% 62.9%	RI 66.5% 61.0%
	AZ 52.4% 44.9%	NM 64.8% 56.7%	KS 52.6% 44.9%	AR 45.5% 36.0%	TN 44.1% 38.8%	NC 50.5% 43.4%	SC 46.1% 40.3%	DC 63.4% 54.4%	DE 60.1% 52.3%	
			OK 46.9% 39.9%	LA 41.0% 36.6%	MS 38.6% 34.2%	AL 42.0% 34.0%	GA 45.1% 38.0%			
				TX 50.7% 43.4%				FL 56.7% 48.5%	PR 68.4% 59.4%	

HI
71.0%
53.3%

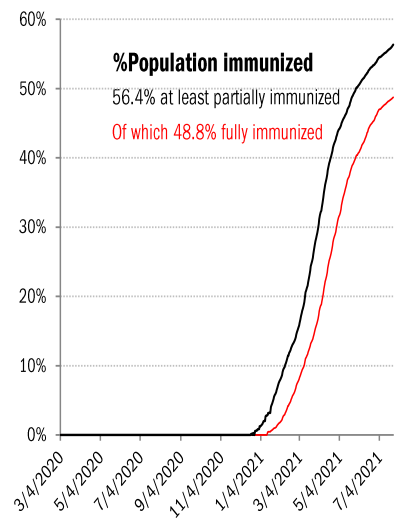
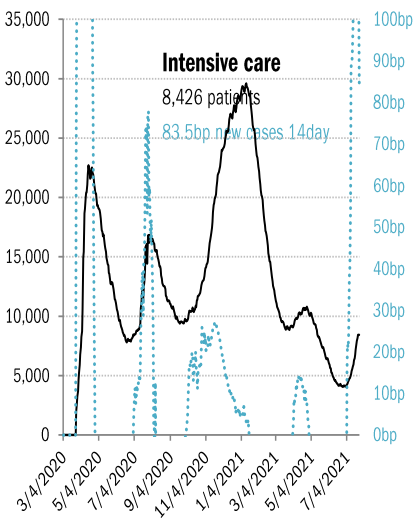
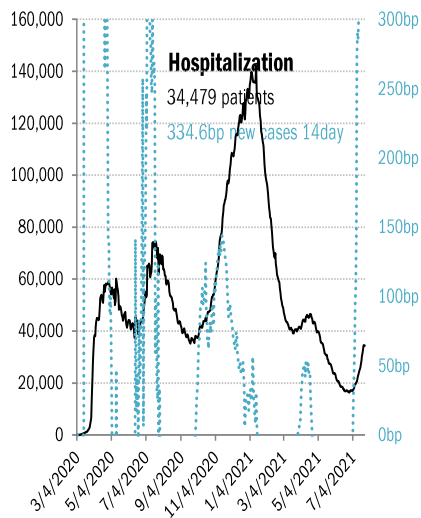
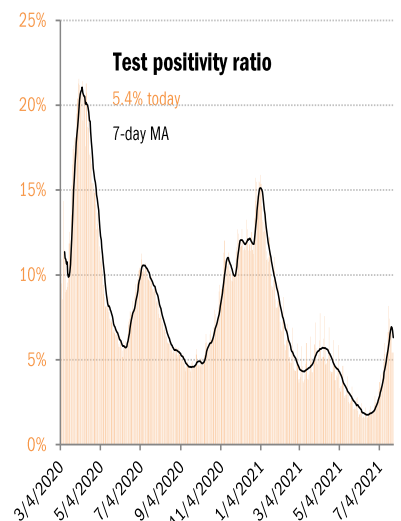
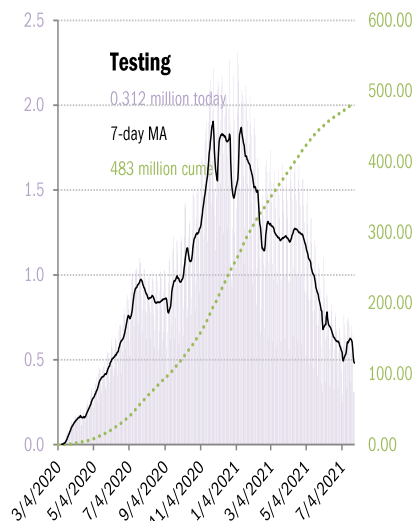
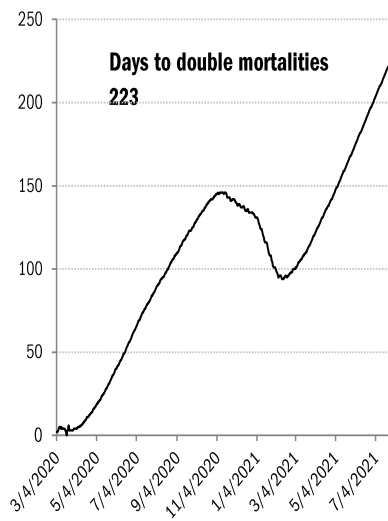
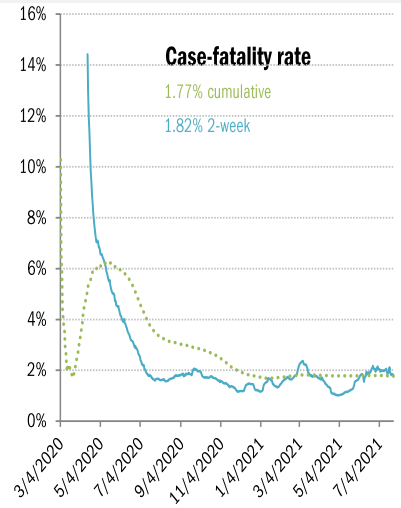
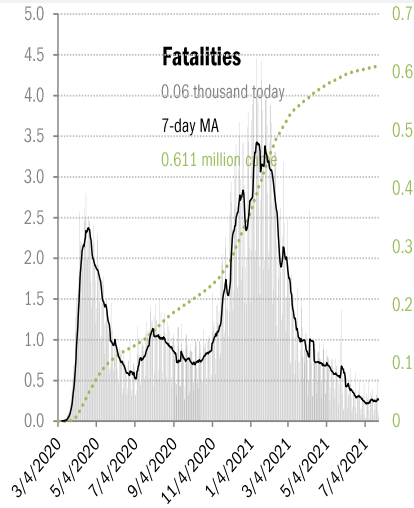
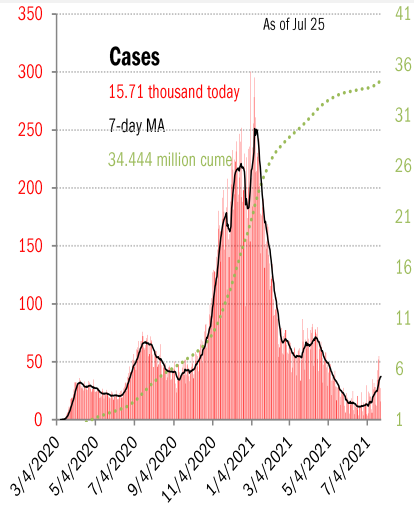
The demographics of US vaccination



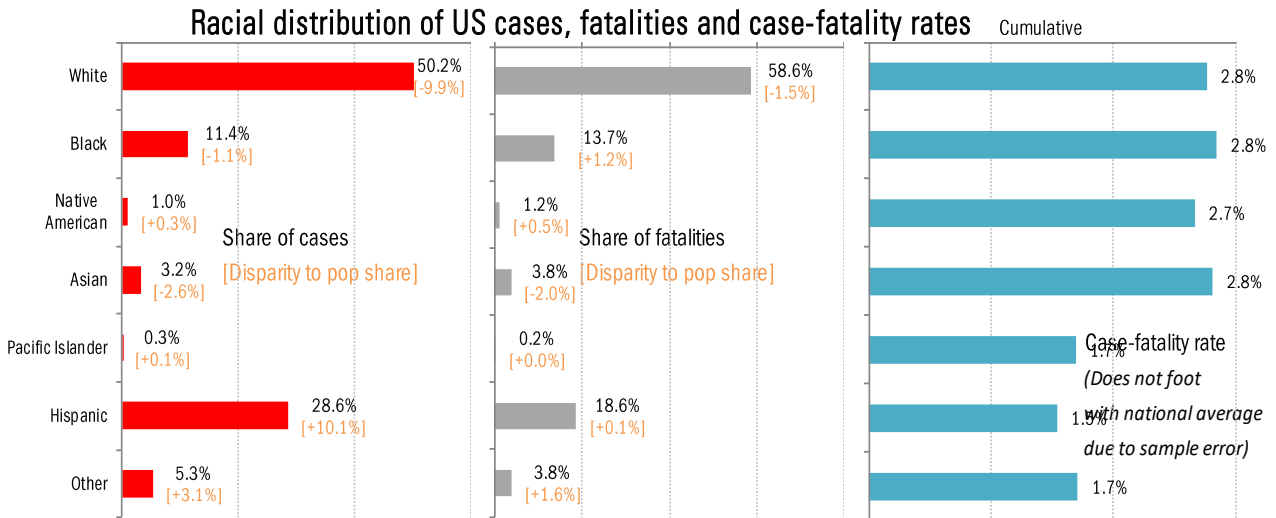
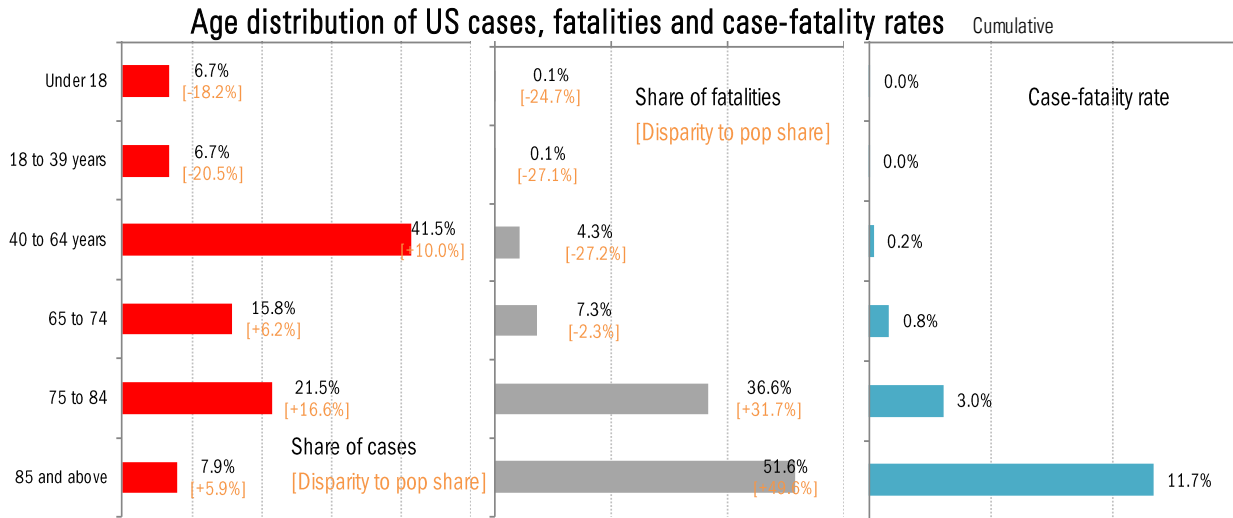
Source: [CDC](#), [CDC](#), [Our World in Data](#), TrendMacro calculations

US deep-dive

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

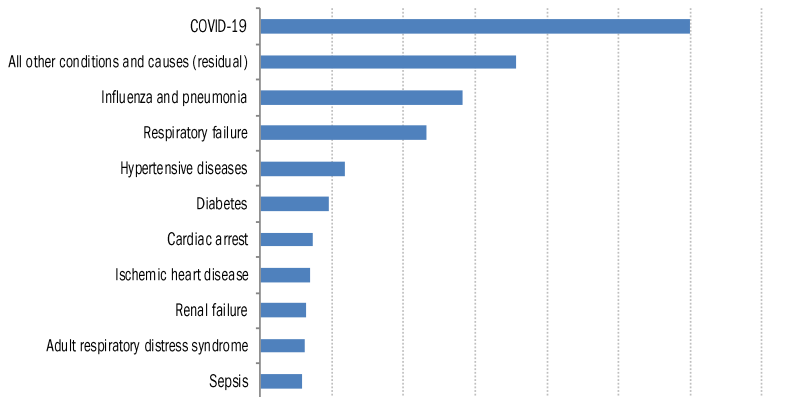


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations



Comorbidities

Top-ten joint causes of Covid mortalities, cumulative



As of Jul 18

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

[Rebuking a Lawless CDC](#)

Wall Street Journal

July 25, 2021

[Anthony Fauci, Rand Paul and Wuhan](#)

Wall Street Journal

July 25, 2021

[The Delta Variant Is the Symptom of a Bigger Threat:](#)

[Vaccine Refusal](#)

Apoorva Mandavilli

New York Times

July 25, 2021

[The Pandemic Ruined Third Grade. Can Summer School Make Up for It?](#)

Sarah Mervosh

New York Times

July 25, 2021

[Covid-19 Pill Race Heats Up as Japanese Firm Vies With Pfizer, Merck](#)

Peter Landers

Wall Street Journal

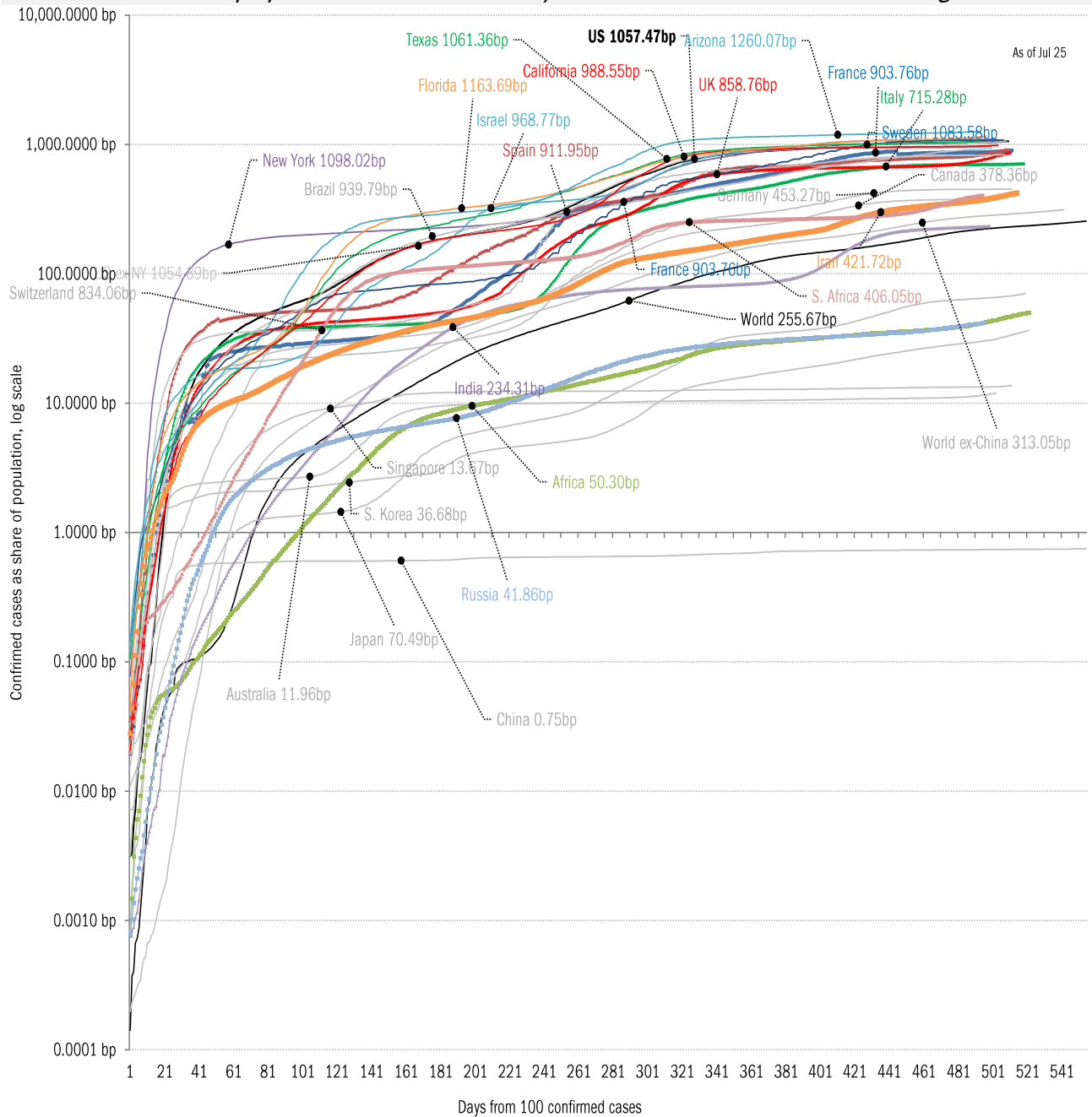
July 25, 2021

Meme of the day



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

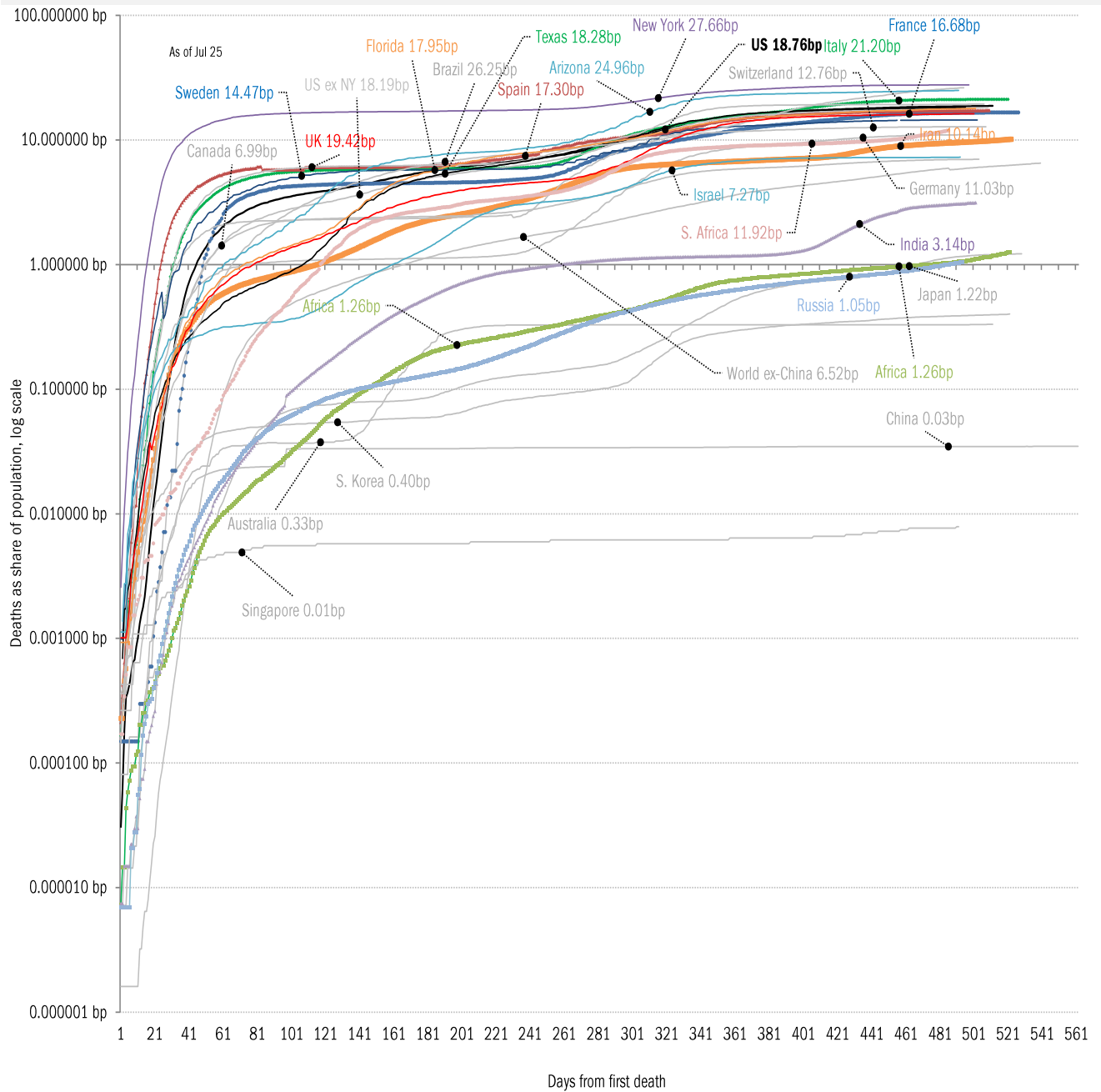
The coronavirus case accelerometer... tracking the world's infection curves
Share of infected population from first day with 100 confirmed cases, log scale



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

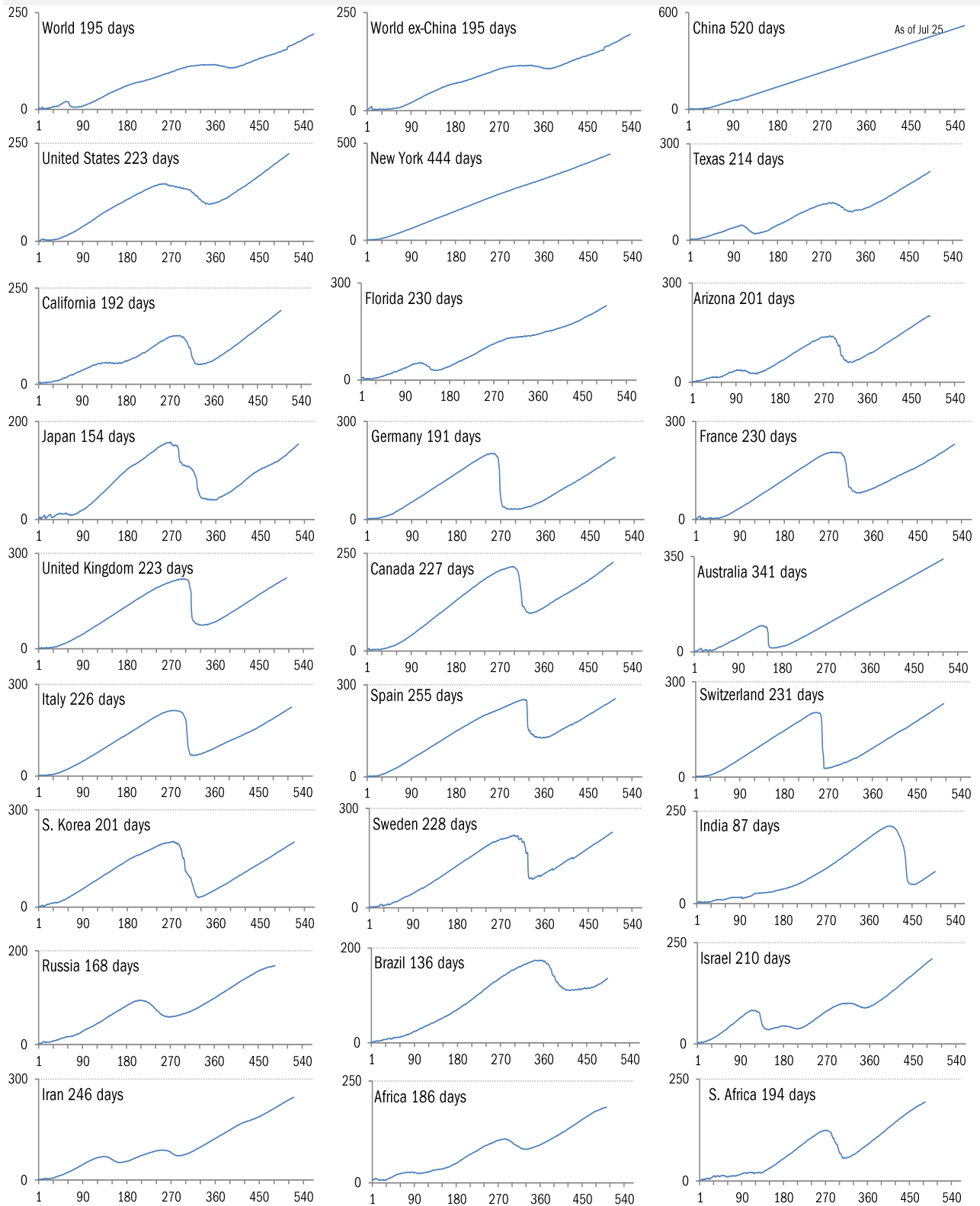


Source: [Johns Hopkins](#), TrendMacro calculations

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

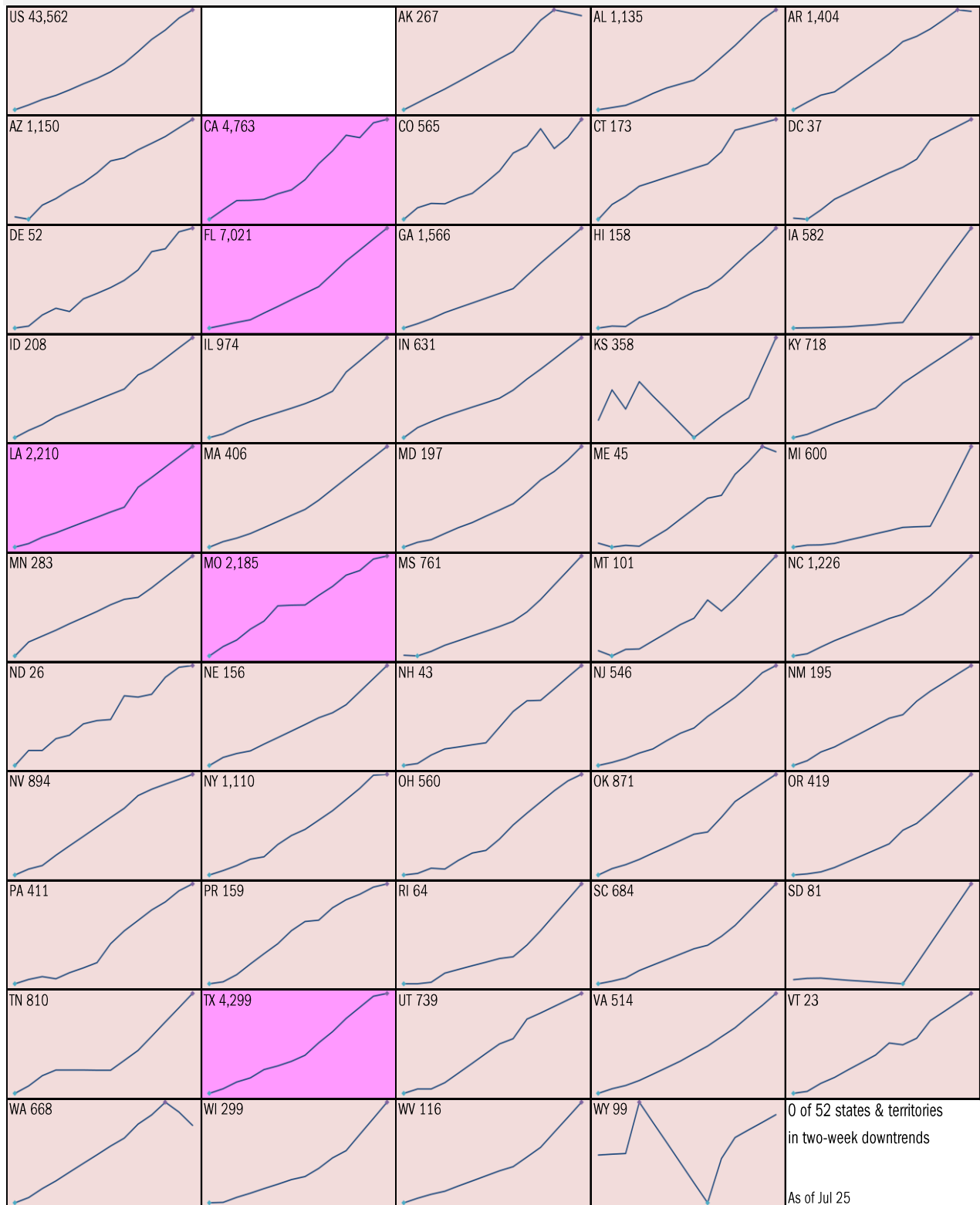
Vertical: days to double deaths Horizontal: days from first death

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

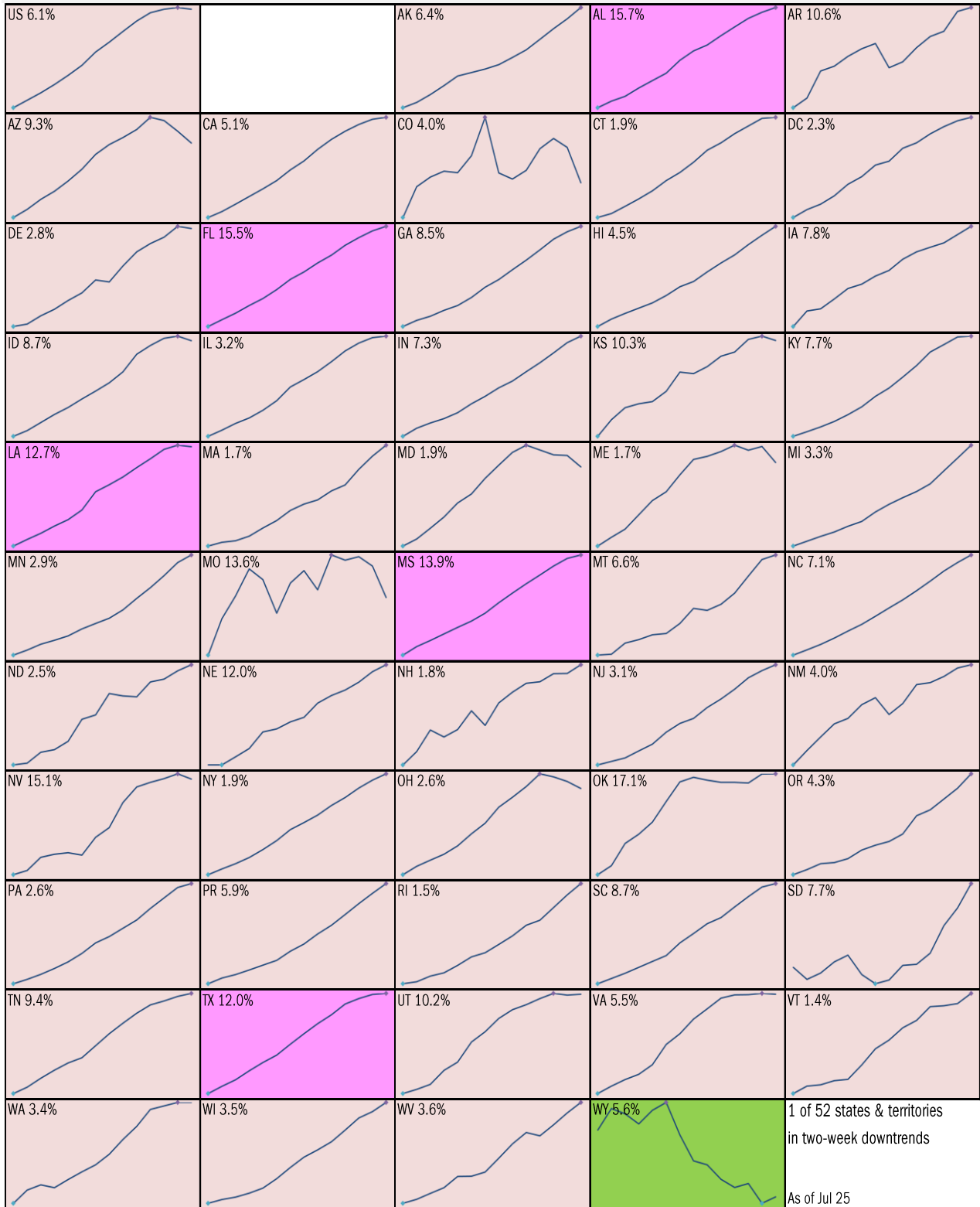


Source: [Johns Hopkins](#), TrendMacro calculations

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

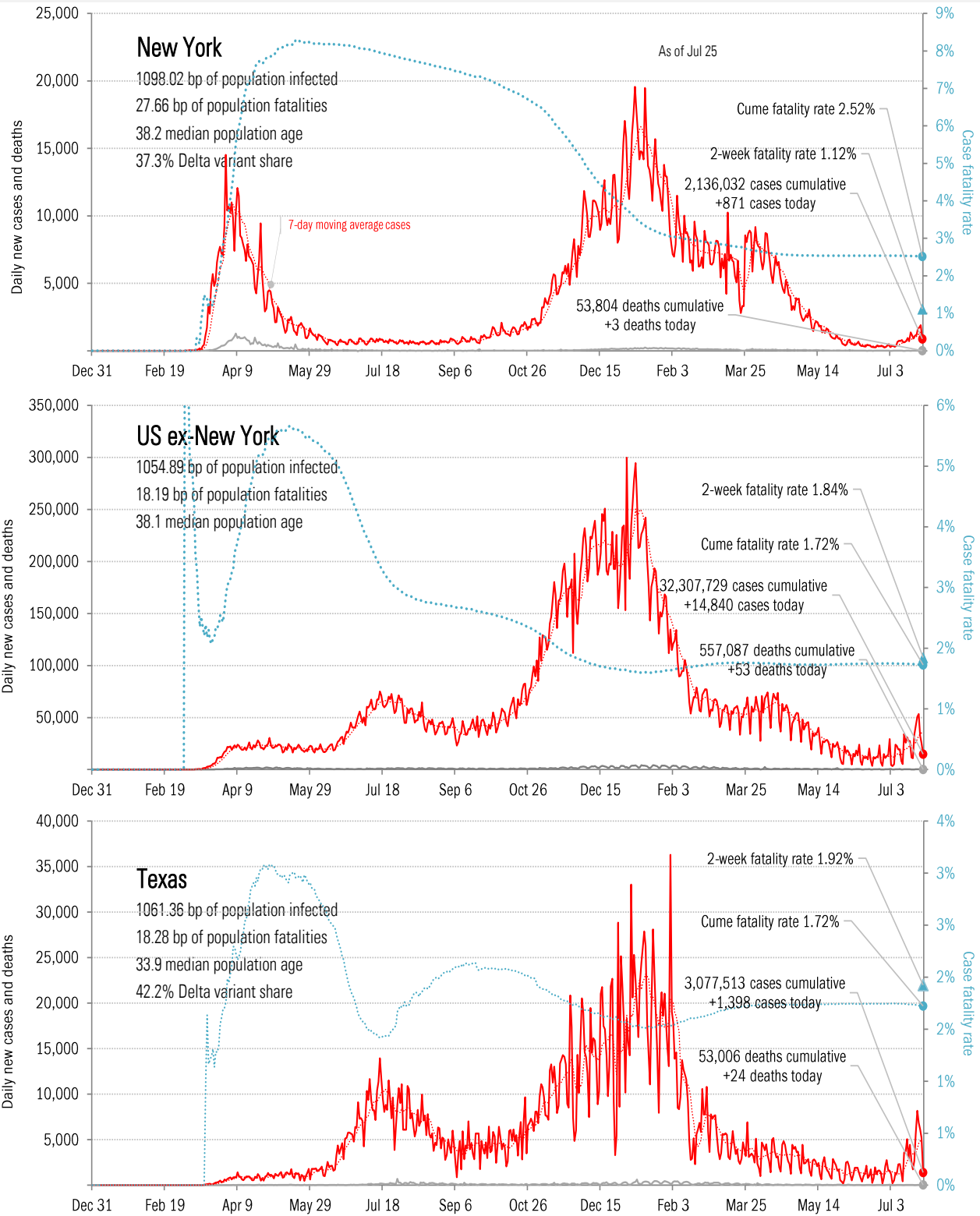
14-day moving average, last 14 days Most recent value displayed ● High ● Low

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



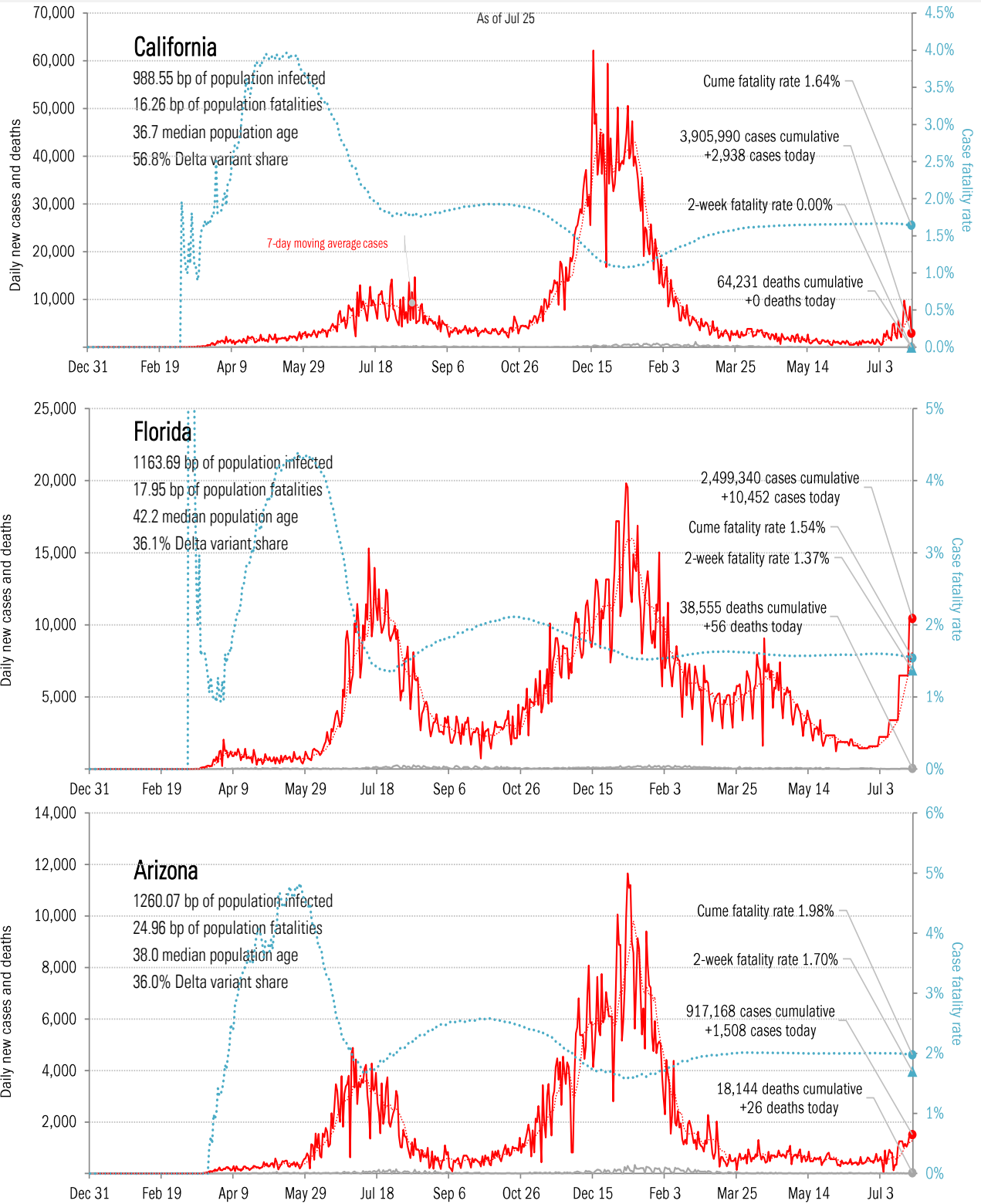
Source: [Covid Act Now](#), TrendMacro calculations

From Ground Zero to the Rio Grande



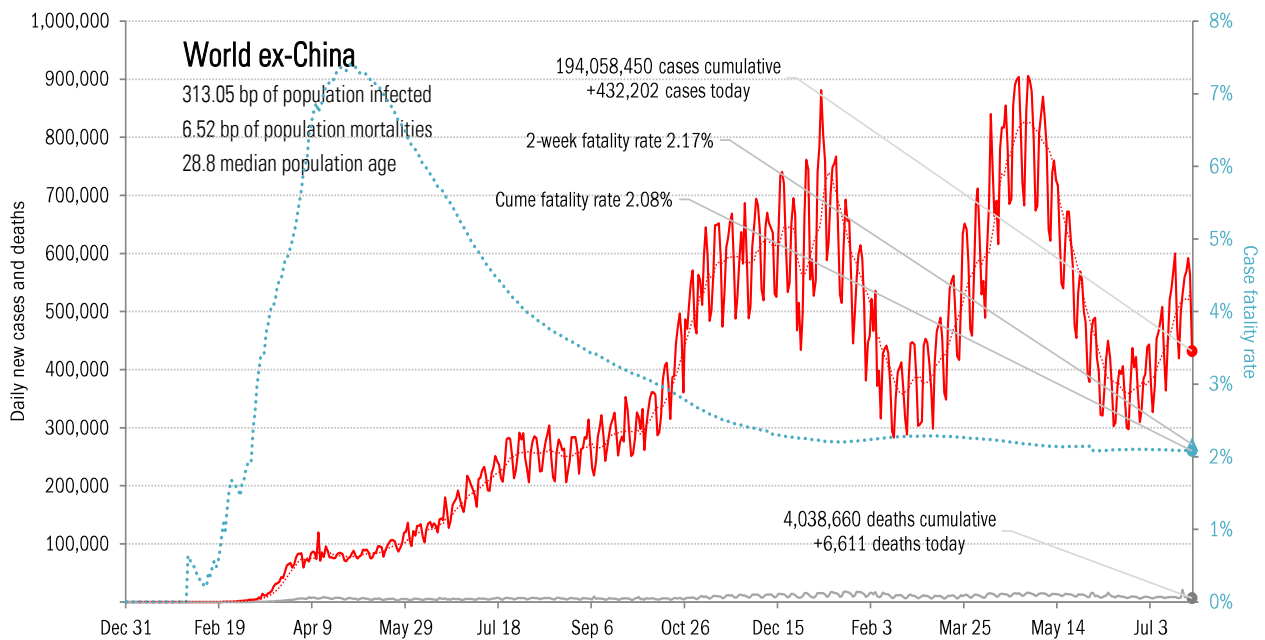
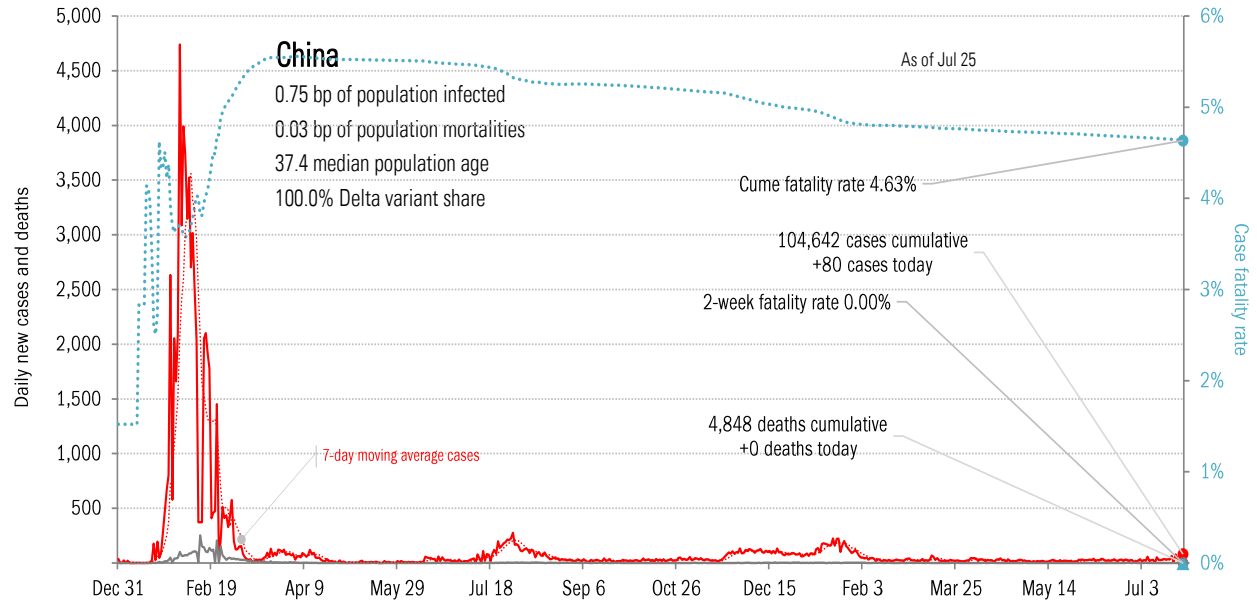
Source: [Johns Hopkins](#), TrendMacro calculations

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



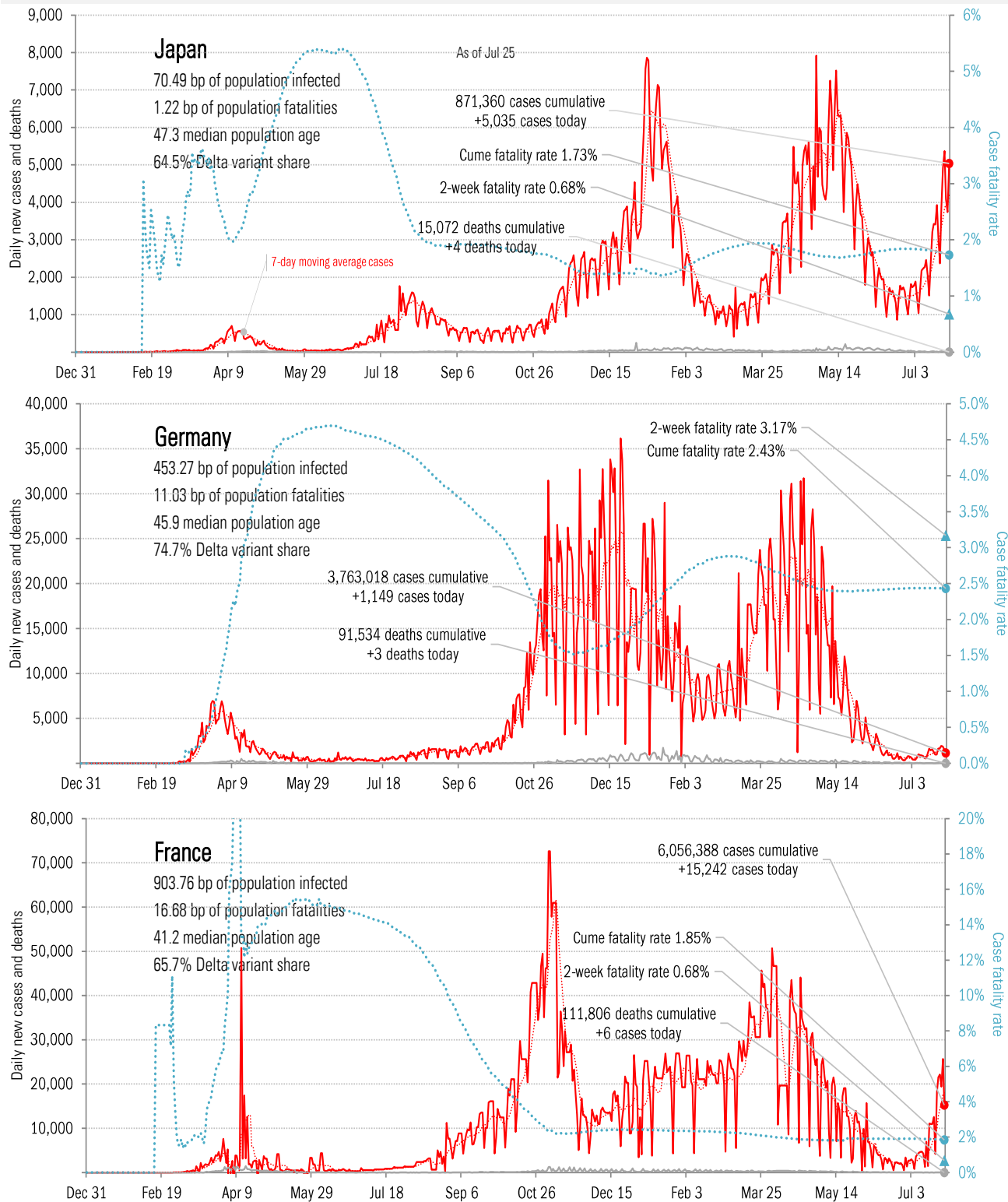
Source: [Johns Hopkins](#), TrendMacro calculations

Patient zero... and then everyone else



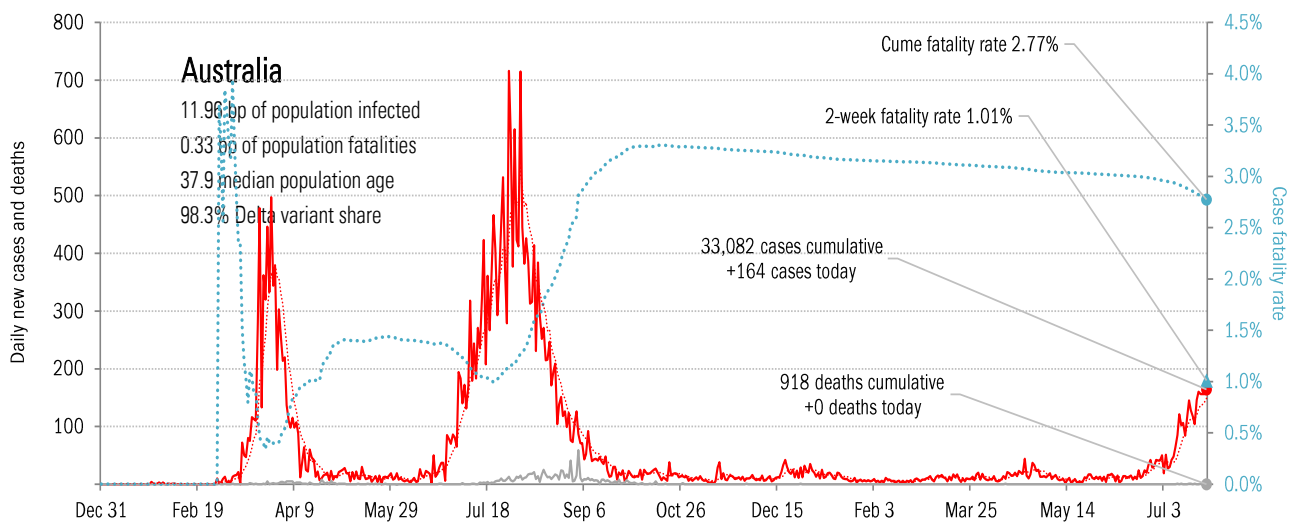
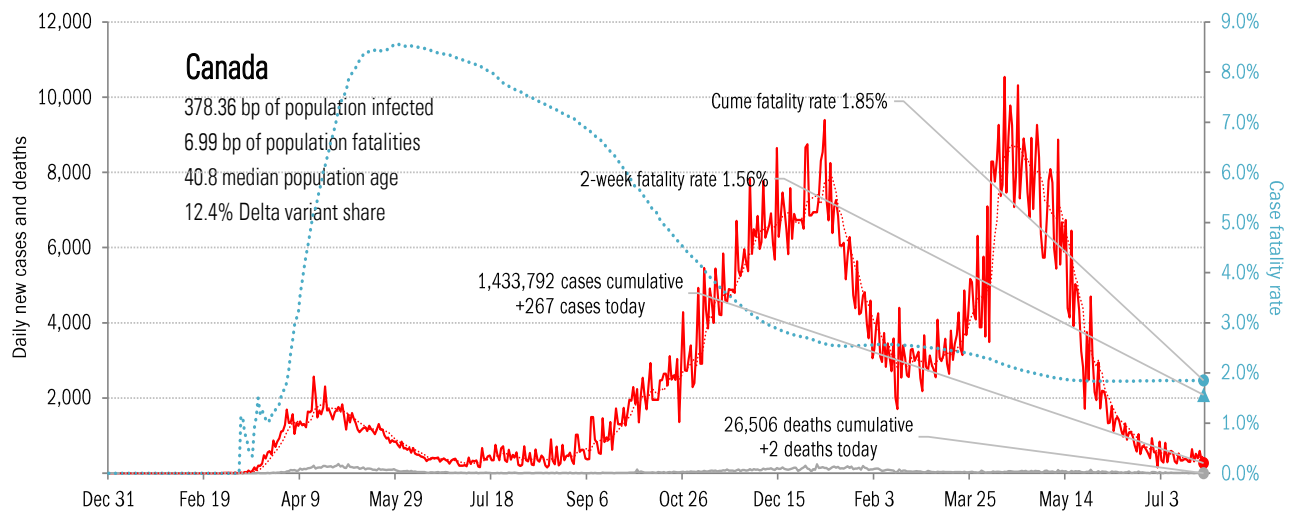
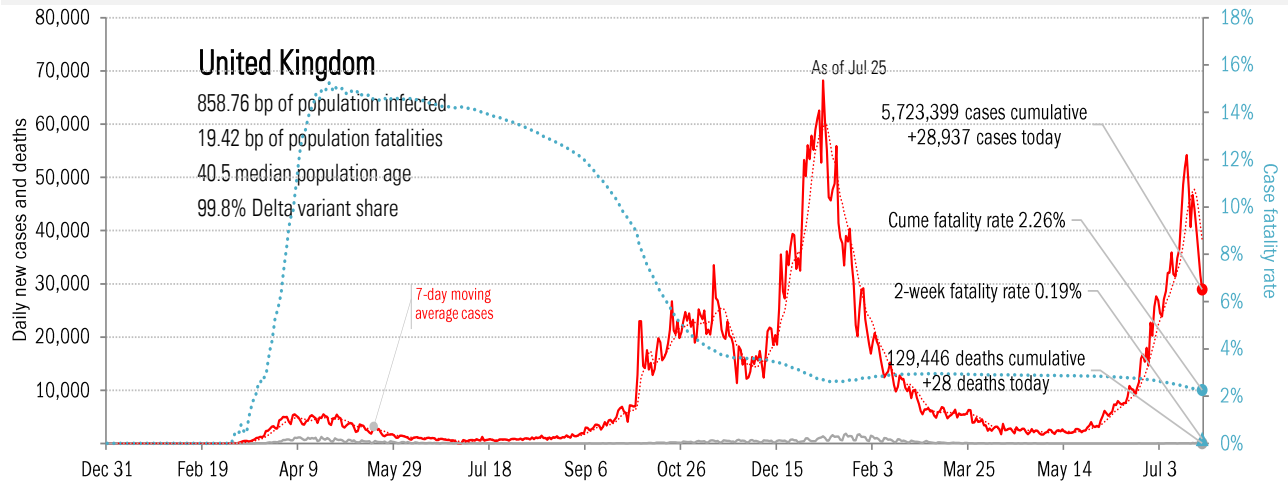
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the largest economies



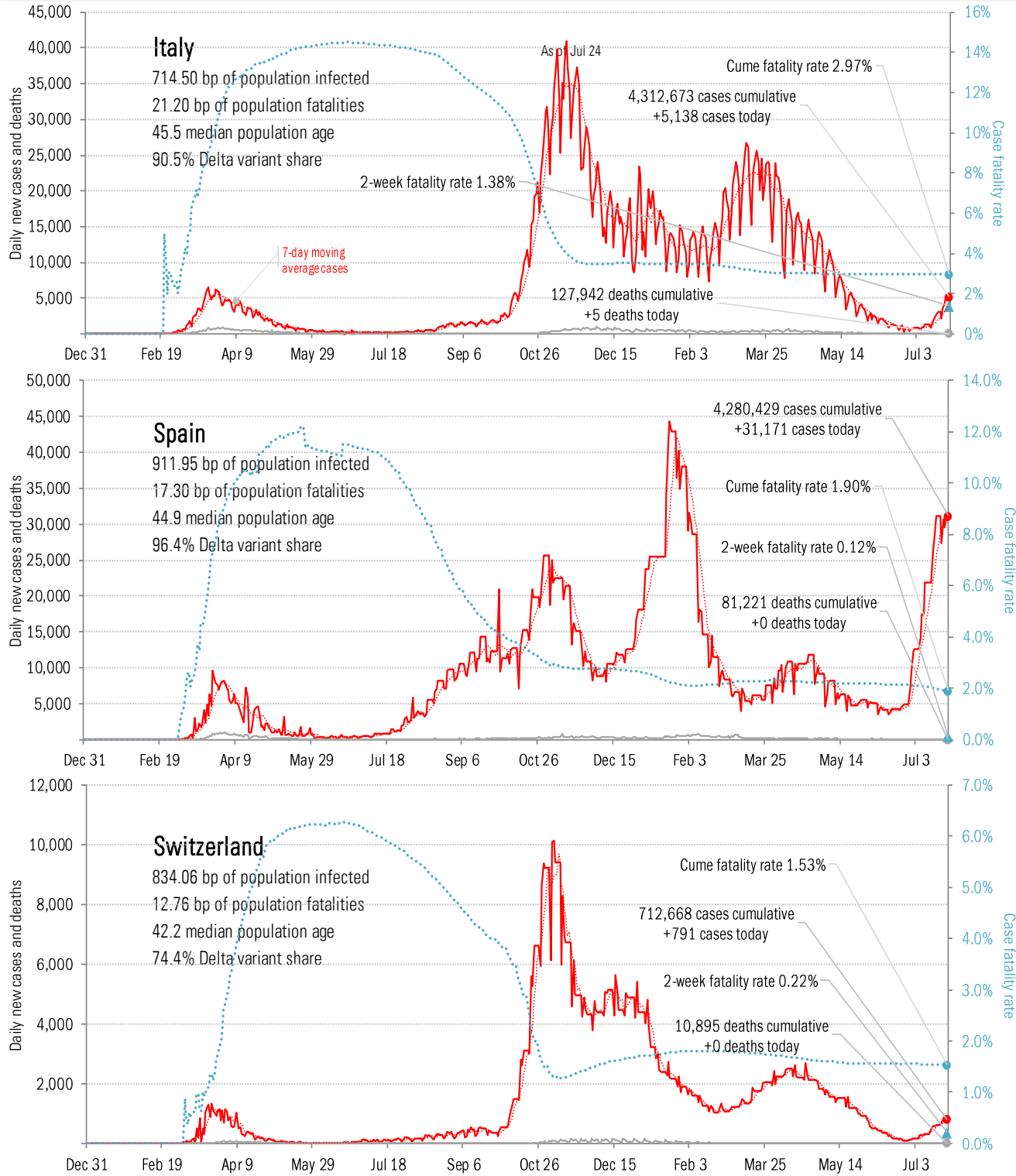
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in The Anglosphere



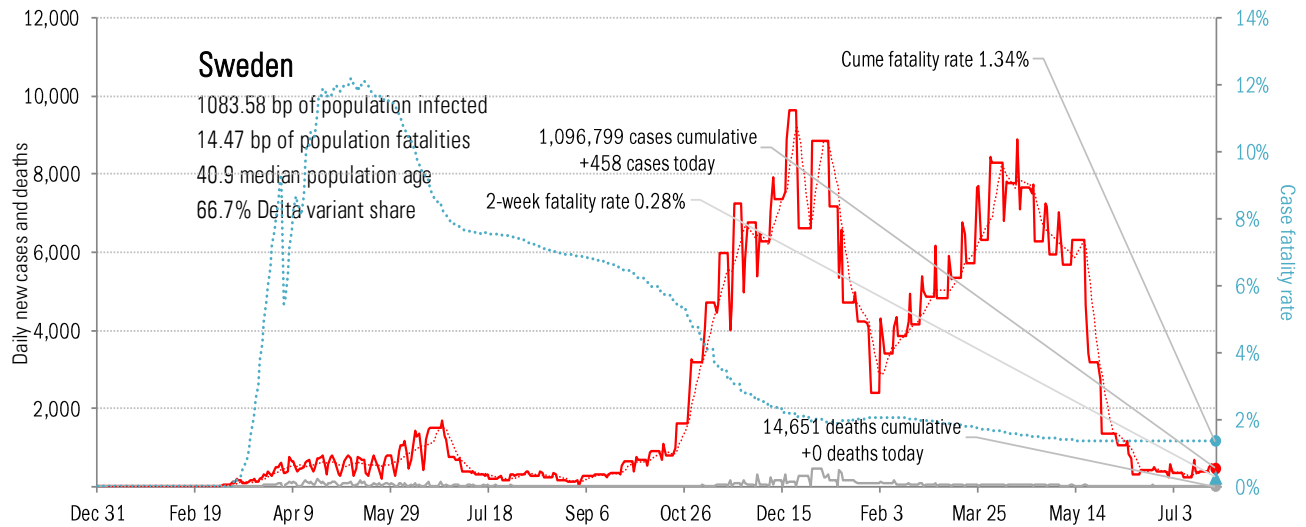
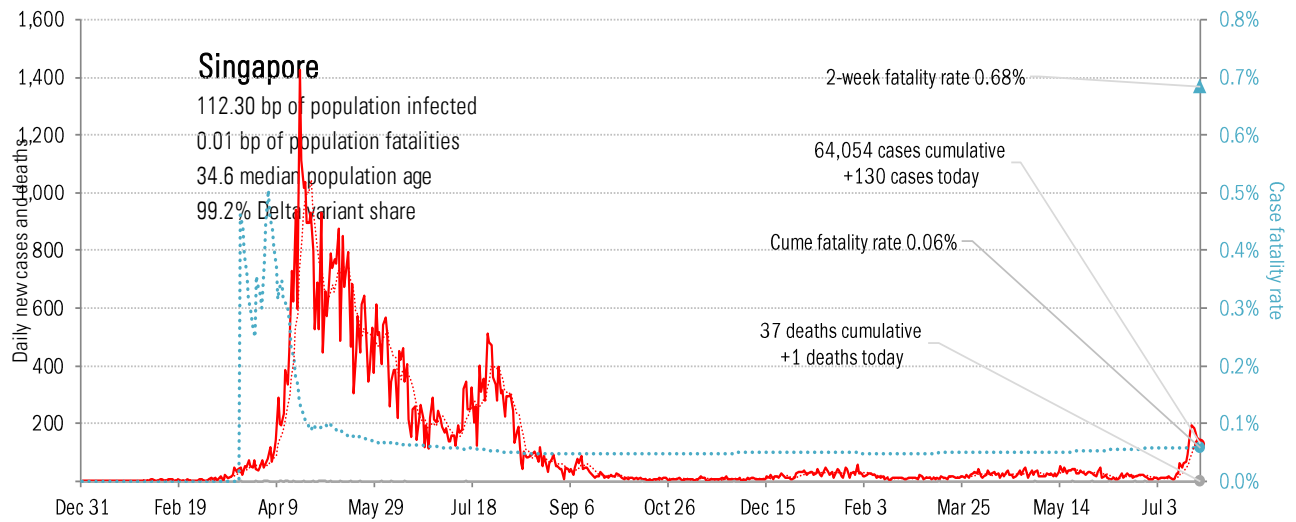
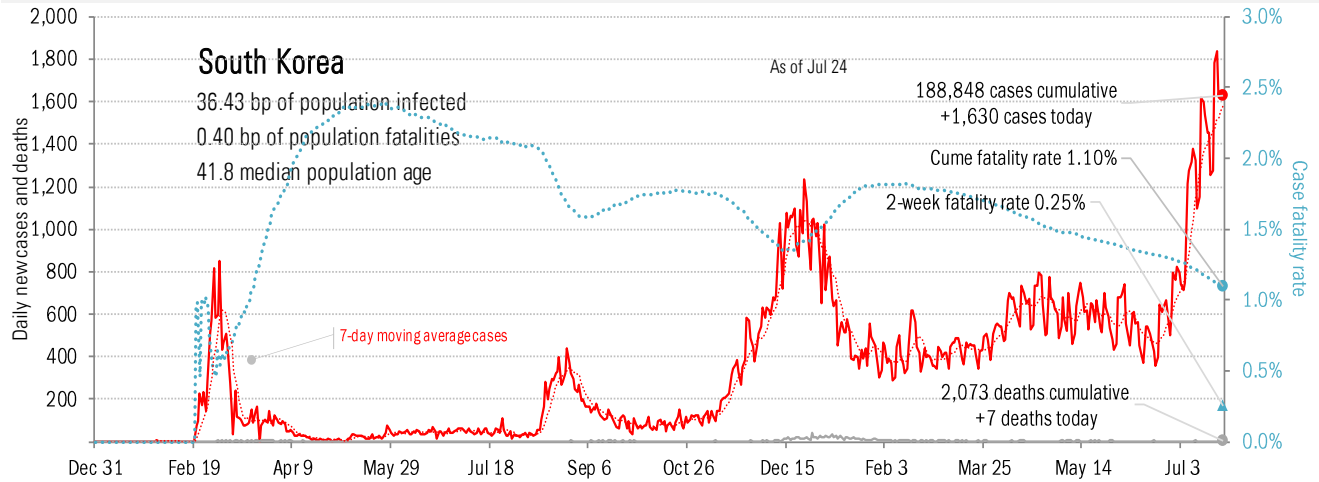
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in continental Europe



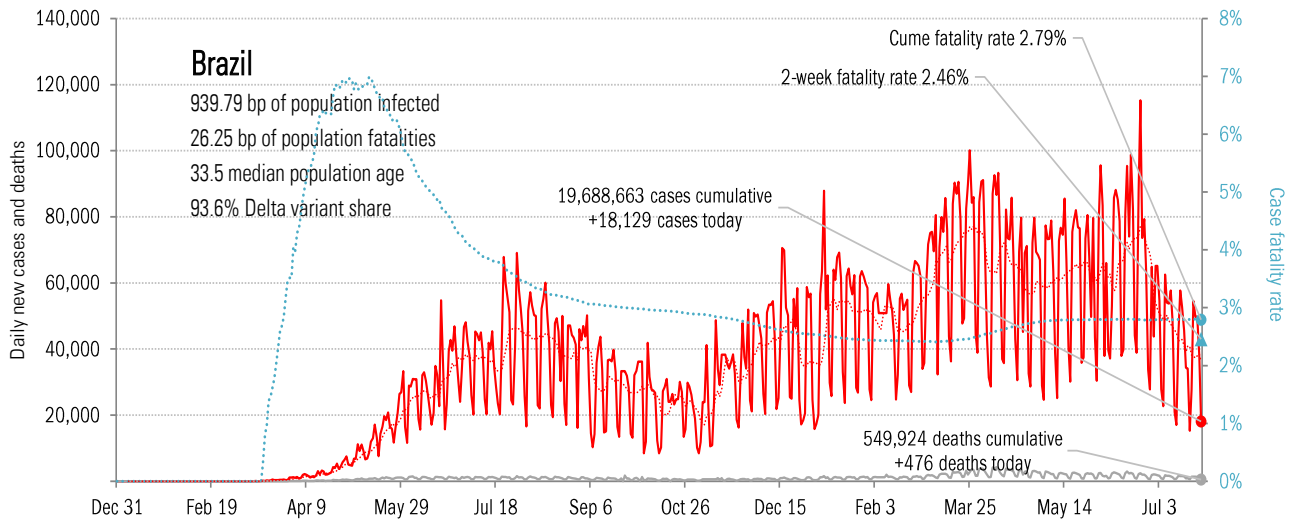
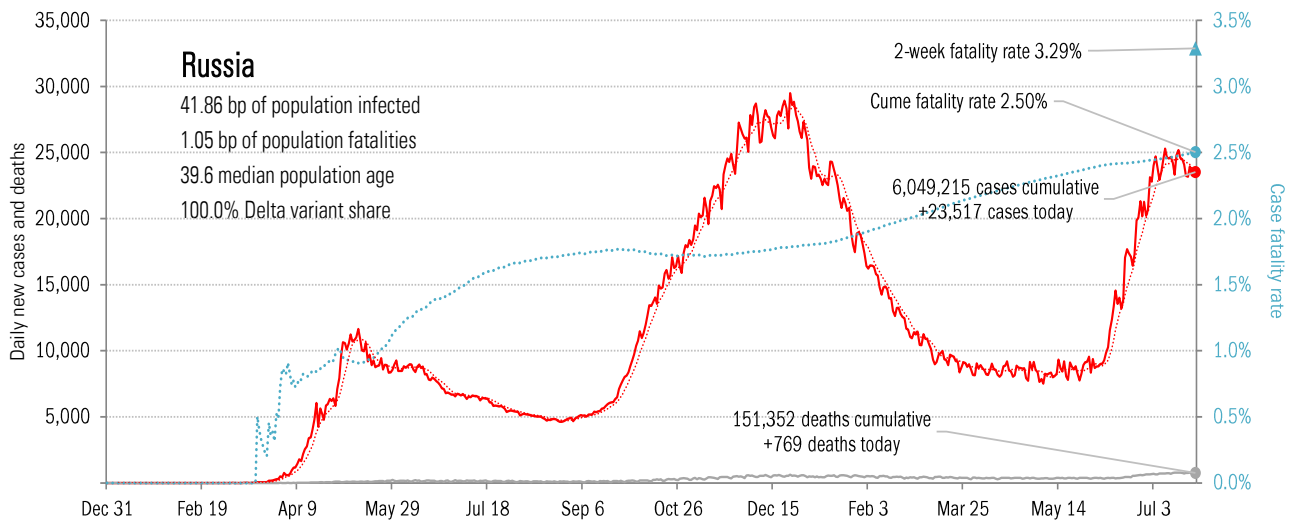
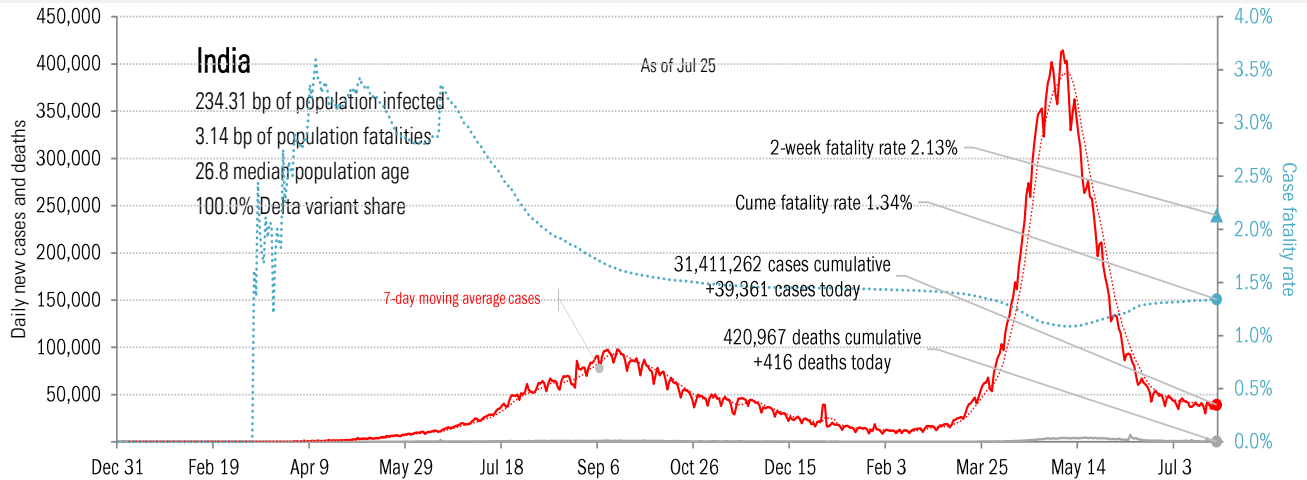
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in other hot-spots



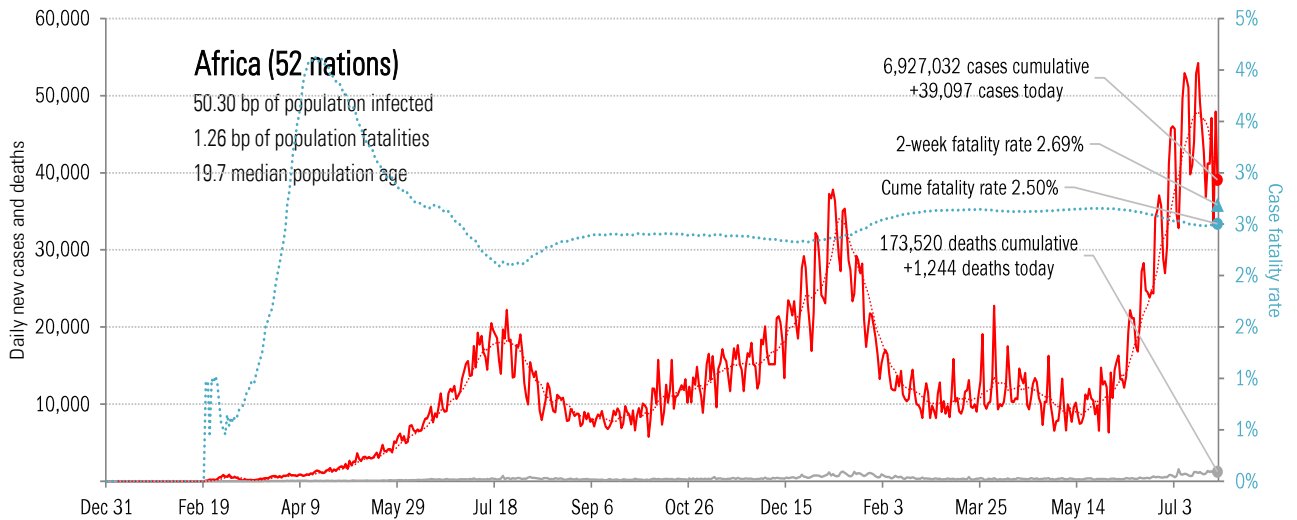
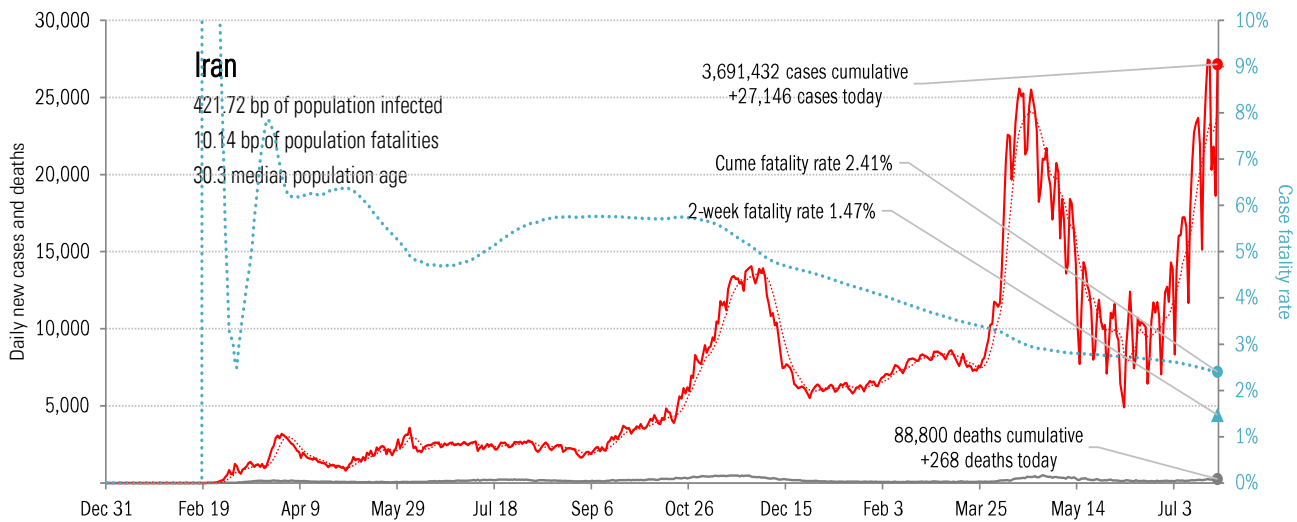
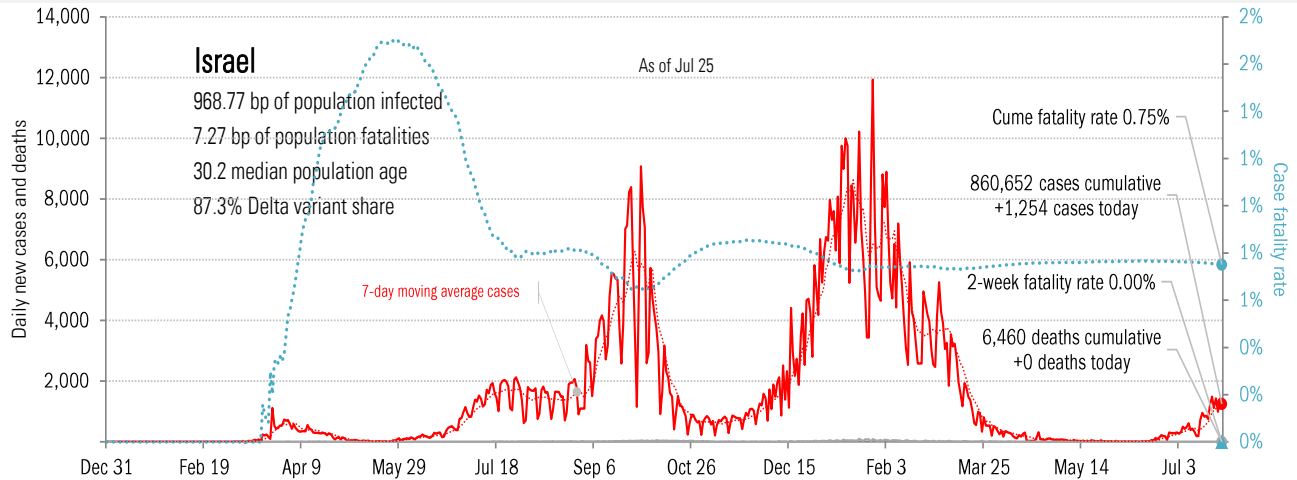
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the BRICs ex-China



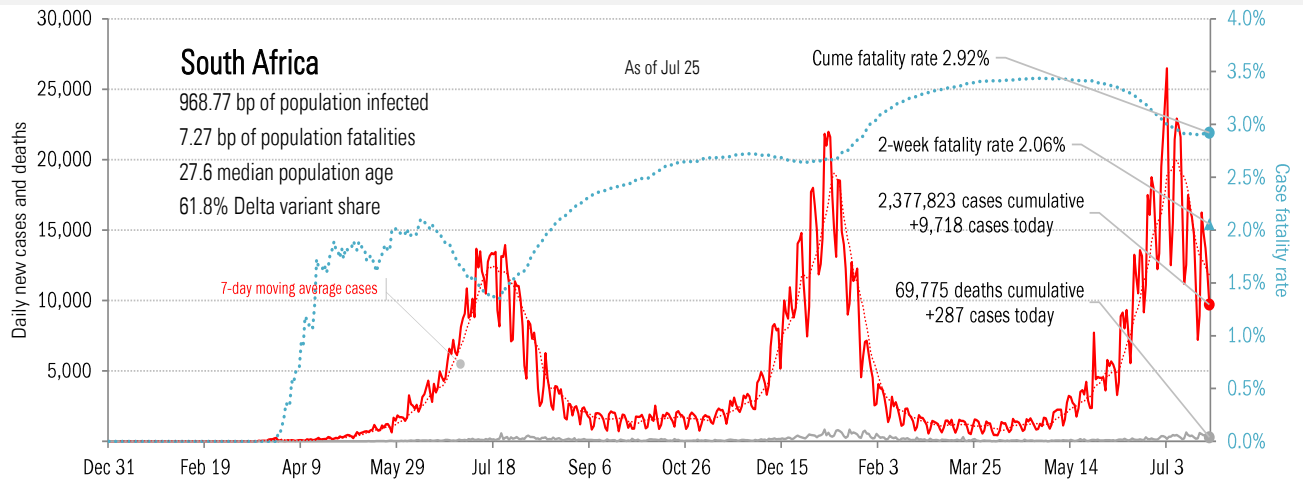
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the Middle East and Africa



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

Impact in Africa, continued



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