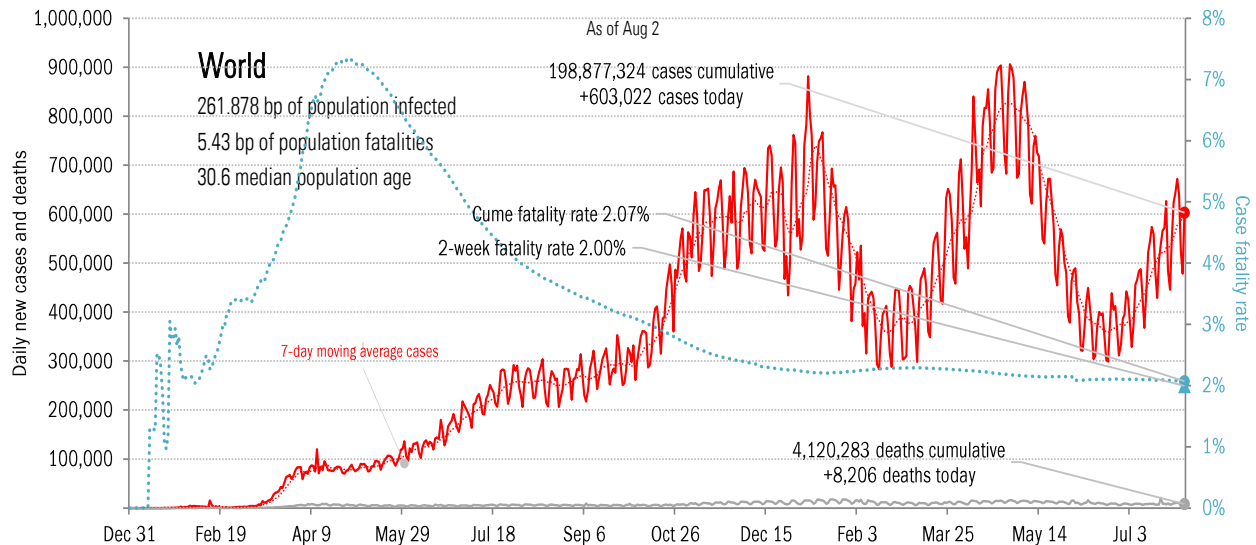
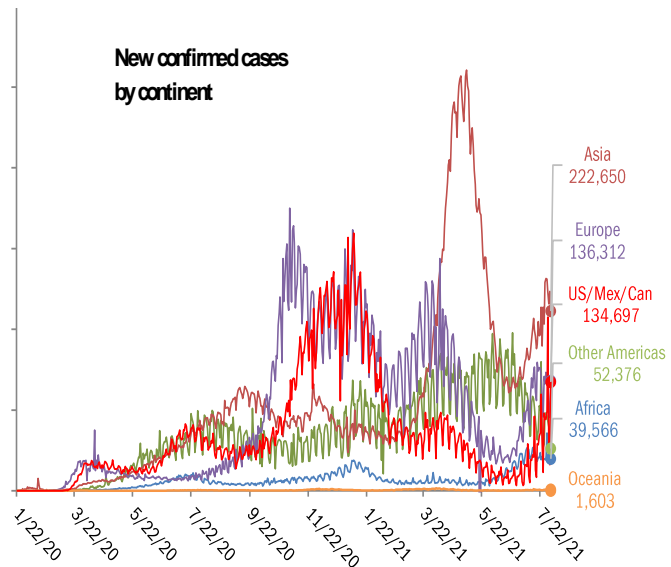


Data Insights: Covid-2019 Monitor

Tuesday, August 3, 2021

The global scorecard

The worst ten countries			
New cases		New Deaths	
United States	+143,794	Indonesia	+1,568
Spain	+55,939	Russia	+770
Iran	+37,189	United States	+451
India	+30,549	India	+422
Russia	+22,969	Iran	+411
Turkey	+22,898	Brazil	+389
Indonesia	+22,404	Malaysia	+379
United Kingdom	+22,287	Burma	+330
Thailand	+17,970	Argentina	+273
Bangladesh	+15,989	Bangladesh	+246
+391,988		+5,239	
World	+603,022	World	+8,206
Top ten	65%	Top ten	64%



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

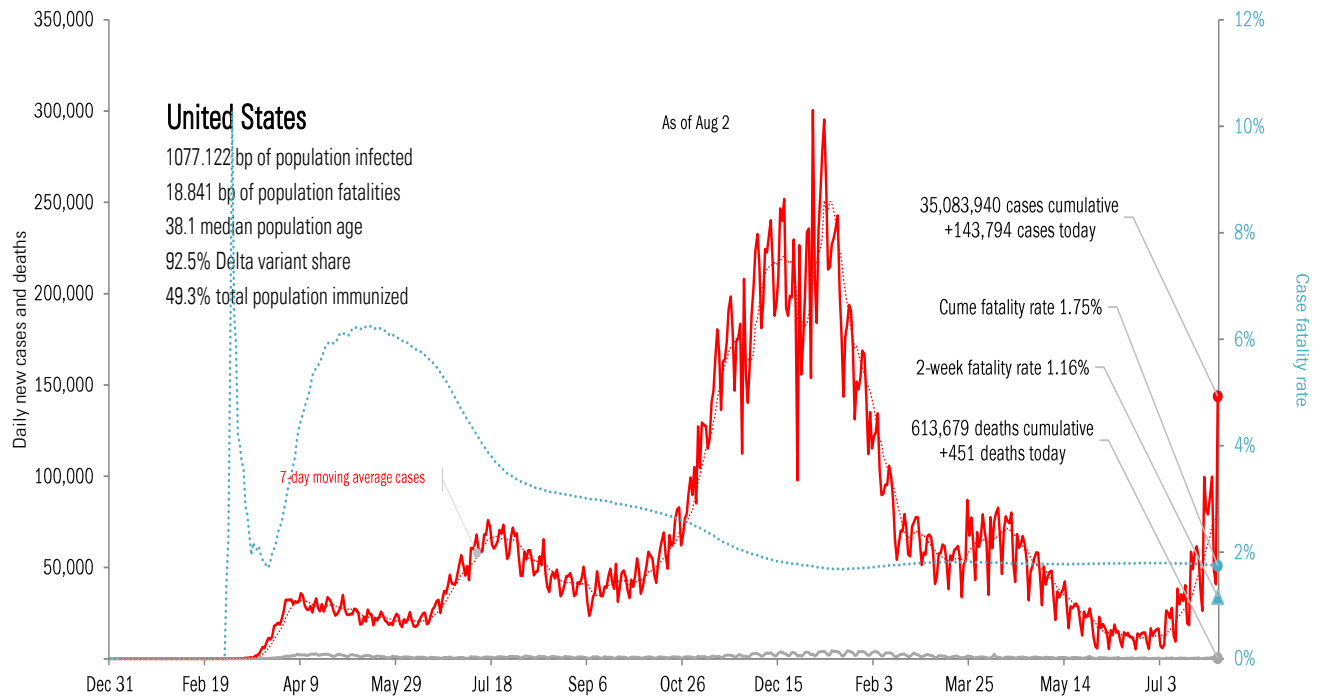
The ten worst US states

New cases			New Deaths			New in hospital			Curre cases			Curre deaths			Curre in hospital			Hospital use		ICU use	
CA	+16,983		CA	+118		FL	+472		CA	3,983,926		CA	64,547		TX	270,711		RI	91%	MO	35%
FL	+15,818		FL	+68		GA	+263		TX	3,151,893		NY	53,657		CA	251,233		MO	85%	AR	33%
LA	+11,108		AR	+42		CA	+214		FL	2,586,781		TX	53,329		FL	214,283		MA	85%	FL	32%
TX	+9,709		NC	+35		RI	+161		NY	2,155,356		FL	38,968		NY	138,937		MD	84%	MS	30%
NC	+8,623		TX	+33		TX	+151		IL	1,425,219		PA	27,857		GA	115,329		FL	84%	LA	27%
TN	+6,864		LA	+27		AZ	+86		PA	1,232,238		NJ	26,606		PA	93,172		GA	84%	NV	26%
SC	+6,799		TN	+25		AL	+83		GA	1,185,594		IL	25,884		CH	90,172		PA	82%	AK	26%
GA	+6,145		GA	+22		LA	+82		CH	1,131,029		GA	21,698		IL	85,162		SC	81%	TX	24%
IL	+5,608		UT	+15		MO	+70		NC	1,056,699		MI	21,188		KY	81,384		CT	81%	OK	24%
CK	+5,597		KY	+14		SC	+61		NJ	1,041,159		CH	20,492		MI	74,303		NV	80%	AL	23%
+93,254			+399			+1,643			18,949,894			354,226			1,414,686						
All states	+143,794			+519			+2302		All states	35,083,940			613,679			2,517,114		All states	70%		67%
Top ten	65%			77%			71%		Top ten	54%			58%			56%		Median	73%		11%

Some states not reporting

Five most improved US states

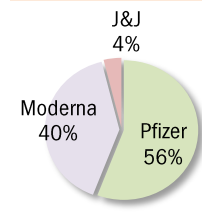
Fewer daily cases		Fewer new deaths		Fewer new hospitalizations		Most pop immunity growth	
AR	-1,140	NJ	-6	TX	-127	AR	+10 bp
MO	-724	PA	-5	FL	-66	CA	+10 bp
FR	-514	AZ	-4	NJ	-42	DE	+10 bp
AZ	-460	MD	-2	NC	-37	FL	+10 bp
PA	-244	NY	-2	CO	-24	IL	+10 bp



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	One dose	% Pop	Immune	% pop	New immune today			
	356,858,642				+0.471 million	US	49.3%	57.4%
Total population	196,607,026	59%	169,215,231	51%	+0.163 million	UK	56.7%	69.1%
Age 12 to 17	10,921,846	43%	8,356,196	33%	+0.032 million	France	48.0%	63.0%
Age 18 to 64	134,638,665	66%	115,375,681	57%	+0.140 million	Spain	58.3%	68.8%
Age 65 and over	50,822,409	93%	45,353,319	83%	+0.009 million	Germany	51.9%	61.3%
						Italy	52.8%	63.9%
						Australia	15.4%	33.2%
						Israel	62.2%	66.9%
						Canada	59.5%	71.9%
						Japan	30.0%	40.5%
						Africa	1.8%	3.6%
						India	7.6%	26.7%
						Brazil	19.5%	49.5%
						China	15.5%	43.2%



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



Every American >18 immune in **273 days** by May 1, 2022
 62.2% of population >18 immunized
 12.0% previously tested positive
74.2% vs 60% adult herd immunity*

As of Aug 2

Global data differs from sources, timing

AK
51.5%
45.5%

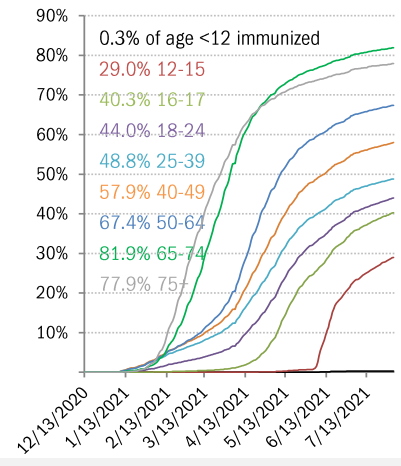
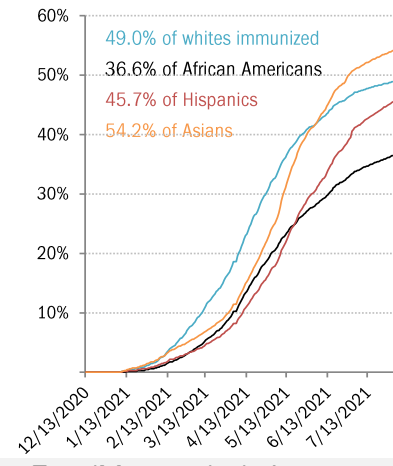
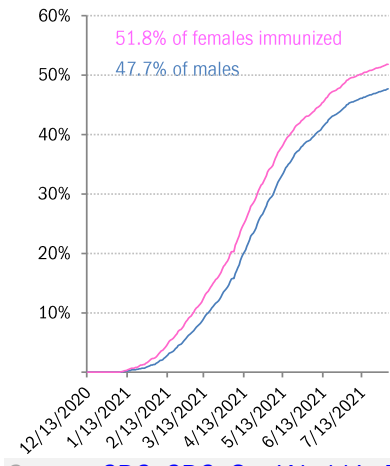
WI
55.8%
51.9%

ME
68.5%
63.5%

WA	ID	MT	ND	MN	IL	MI	NY	VT	NH	
64.2%	41.3%	49.6%	45.6%	59.1%	62.6%	53.2%	63.3%	75.7%	64.9%	
57.8%	37.5%	44.4%	40.2%	53.9%	48.7%	48.9%	57.3%	67.6%	58.4%	
OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA	
60.9%	54.0%	41.8%	52.8%	53.3%	47.4%	50.0%	65.8%	66.2%	72.8%	
56.1%	44.6%	36.7%	47.0%	49.6%	44.3%	46.6%	52.6%	58.5%	64.1%	
CA	UT	CO	NE	MO	KY	WV	VA	MD	CT	RI
65.1%	52.1%	60.5%	54.2%	49.1%	52.4%	46.1%	62.0%	64.9%	70.1%	67.6%
53.1%	44.8%	54.5%	49.6%	41.5%	45.8%	39.1%	54.7%	59.0%	63.4%	61.6%
	AZ	NM	KS	AR	TN	NC	SC	DC	DE	
	53.2%	65.8%	53.6%	47.3%	45.0%	51.5%	47.1%	64.2%	60.9%	
	45.3%	57.4%	45.4%	36.6%	39.2%	43.9%	40.7%	54.9%	52.9%	
			OK	LA	MS	AL	GA			
			48.0%	43.0%	39.8%	43.4%	46.3%			
			40.3%	37.1%	34.5%	34.4%	38.7%			
			TX					FL		PR
			52.0%					58.2%		69.0%
			44.0%					49.1%		60.0%

HI
71.5%
53.6%

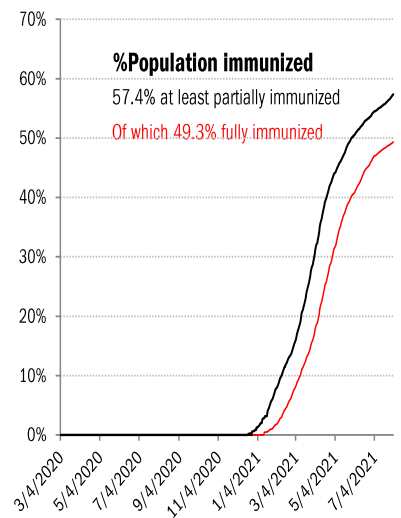
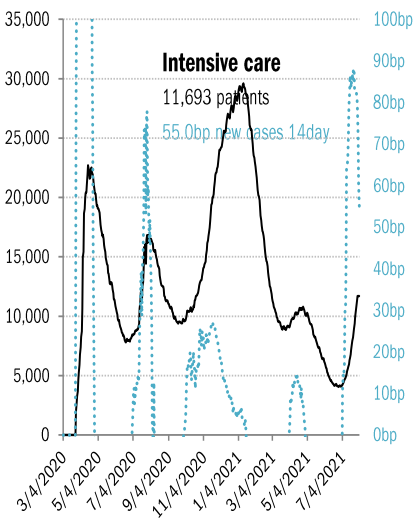
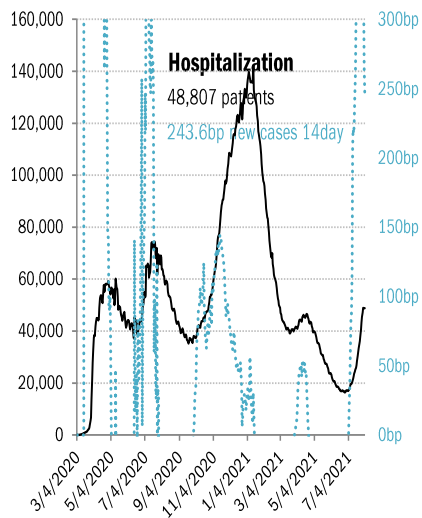
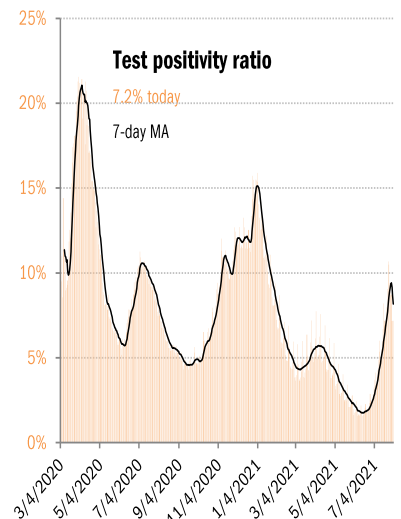
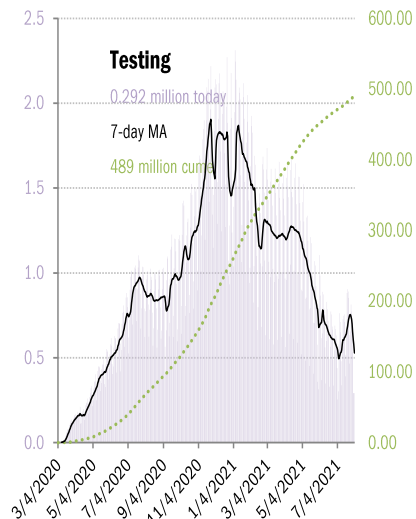
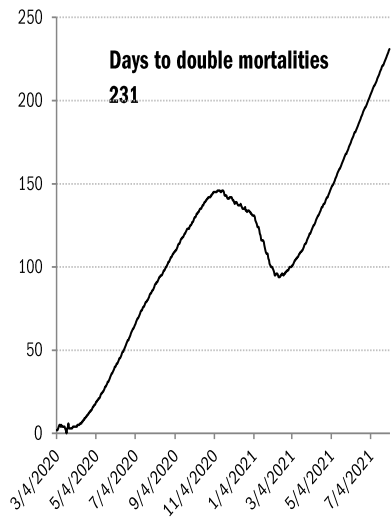
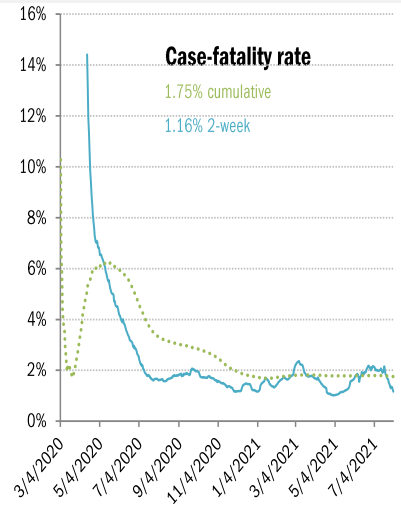
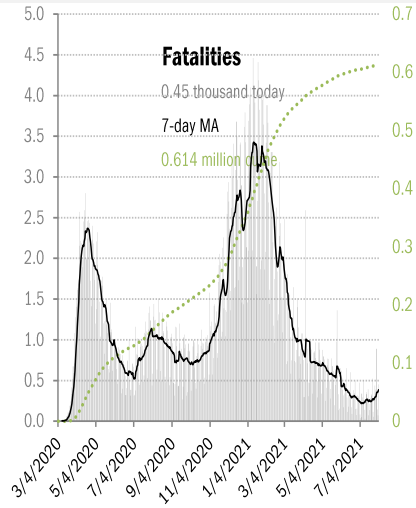
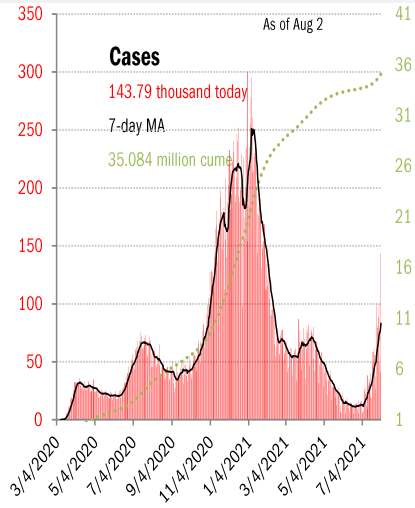
The demographics of US vaccination



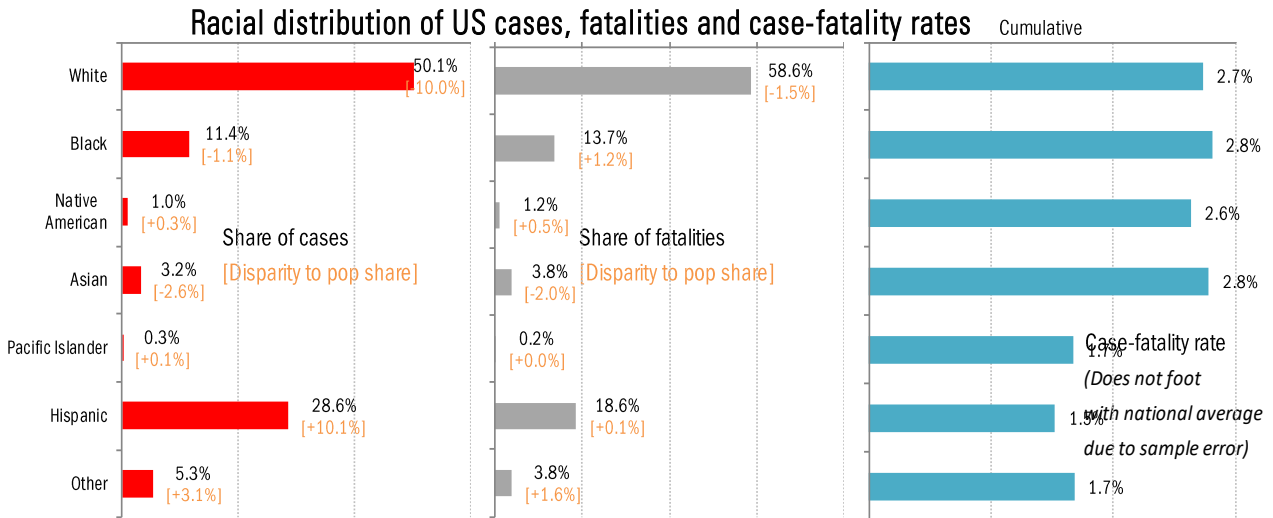
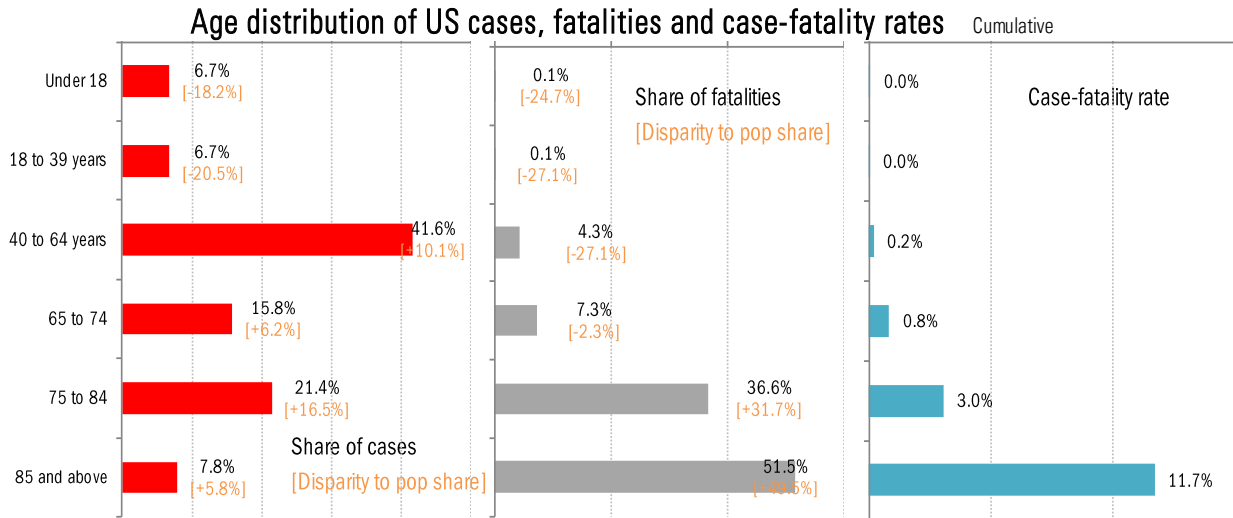
Source: [CDC](#), [CDC](#), [Our World in Data](#), TrendMacro calculations

US deep-dive

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

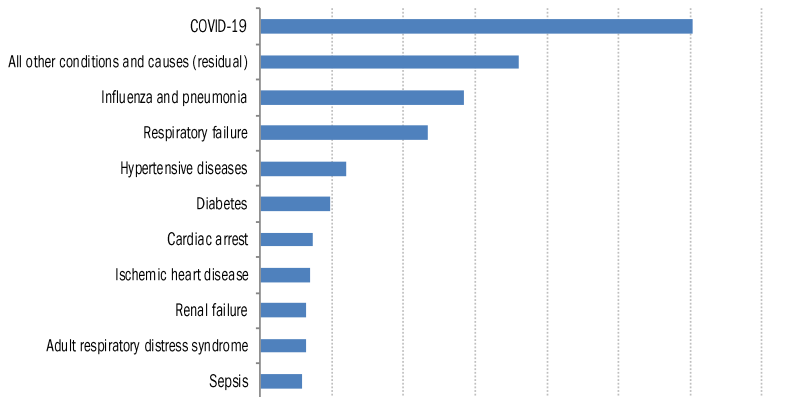


Source: [Johns Hopkins](#), [Covid Act Now](#), TrendMacro calculations



Comorbidities

Top-ten joint causes of Covid mortalities, cumulative



As of Jul 25

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

[Germany Will Offer Vaccine Booster Shots Starting in September](#)

Katrin Bennhold
New York Times
August 2, 2021

[Mask Mandates Are Returning in Many Cities. N.Y.C. Is Holding Back.](#)

Emma G. Fitzsimmons and Dana Rubinstein
New York Times
August 2, 2021

[Americans Suffer Pandemic Whiplash as Leaders Struggle With Changing Virus](#)

Sheryl Gay Stolberg and Michael D. Shear
New York Times
August 2, 2021

[The FDA Finally Gets Moving on Pfizer](#)

Wall Street Journal
August 2, 2021

[Confidence Collapse Continues: Just 28% Believe The Worst Of The Pandemic Is Behind Us](#)

Scott Rasmussen
Rasmussen
August 2, 2021

[The Role of Childcare Challenges in the US Jobs Market Recovery During the COVID-19 Pandemic](#)

Jason Furman et al.
NBER
June 2021

[Virus Flares in Wuhan as Delta Challenges China's Defenses](#)

Bloomberg
August 2, 2021

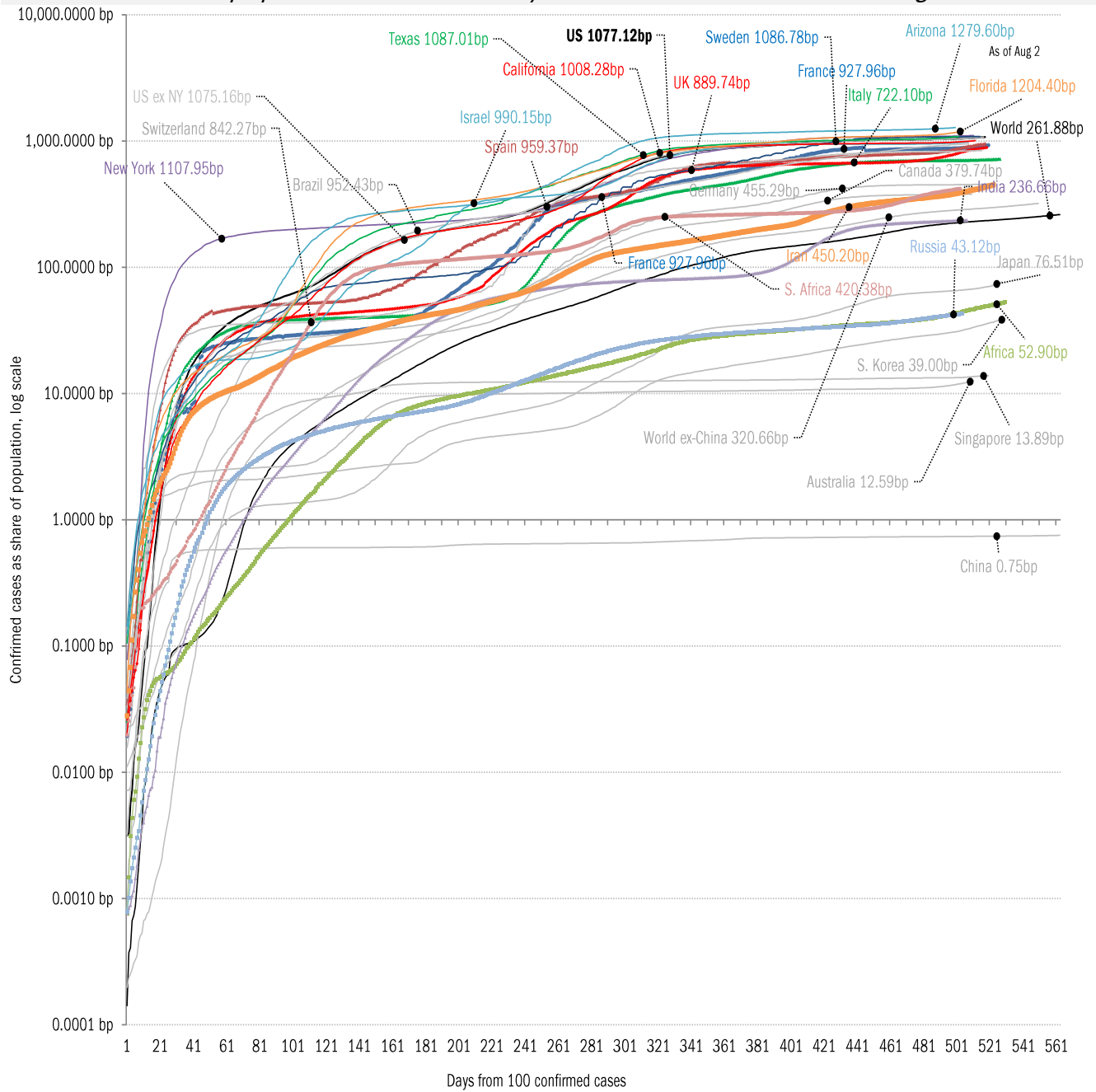
Meme of the day



CDC Still Baffled People Are Paying Attention To Them

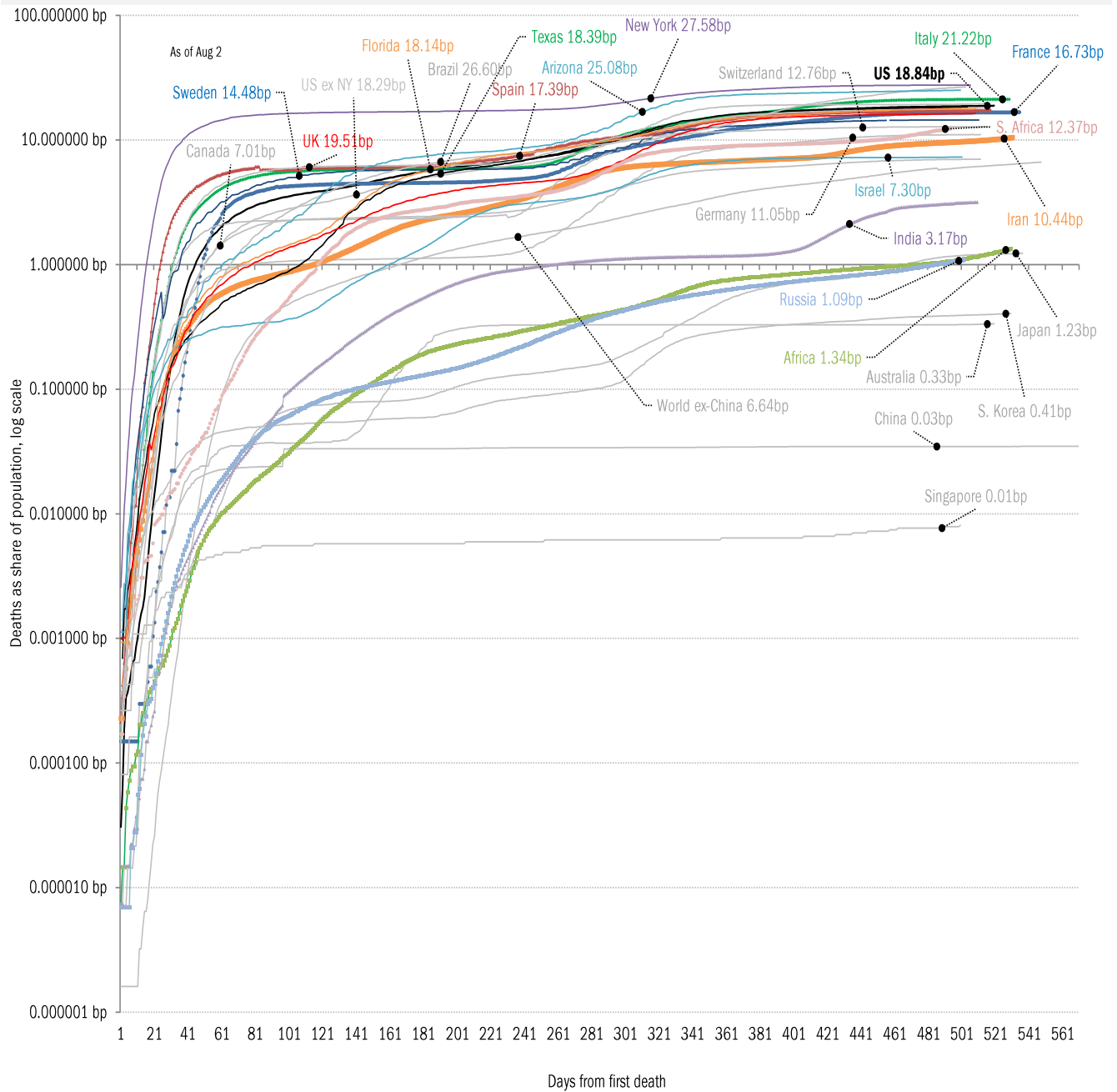
Source: Our beloved clients, [Power Line blog "The Week in Pictures"](#) and [CTUP](#)

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

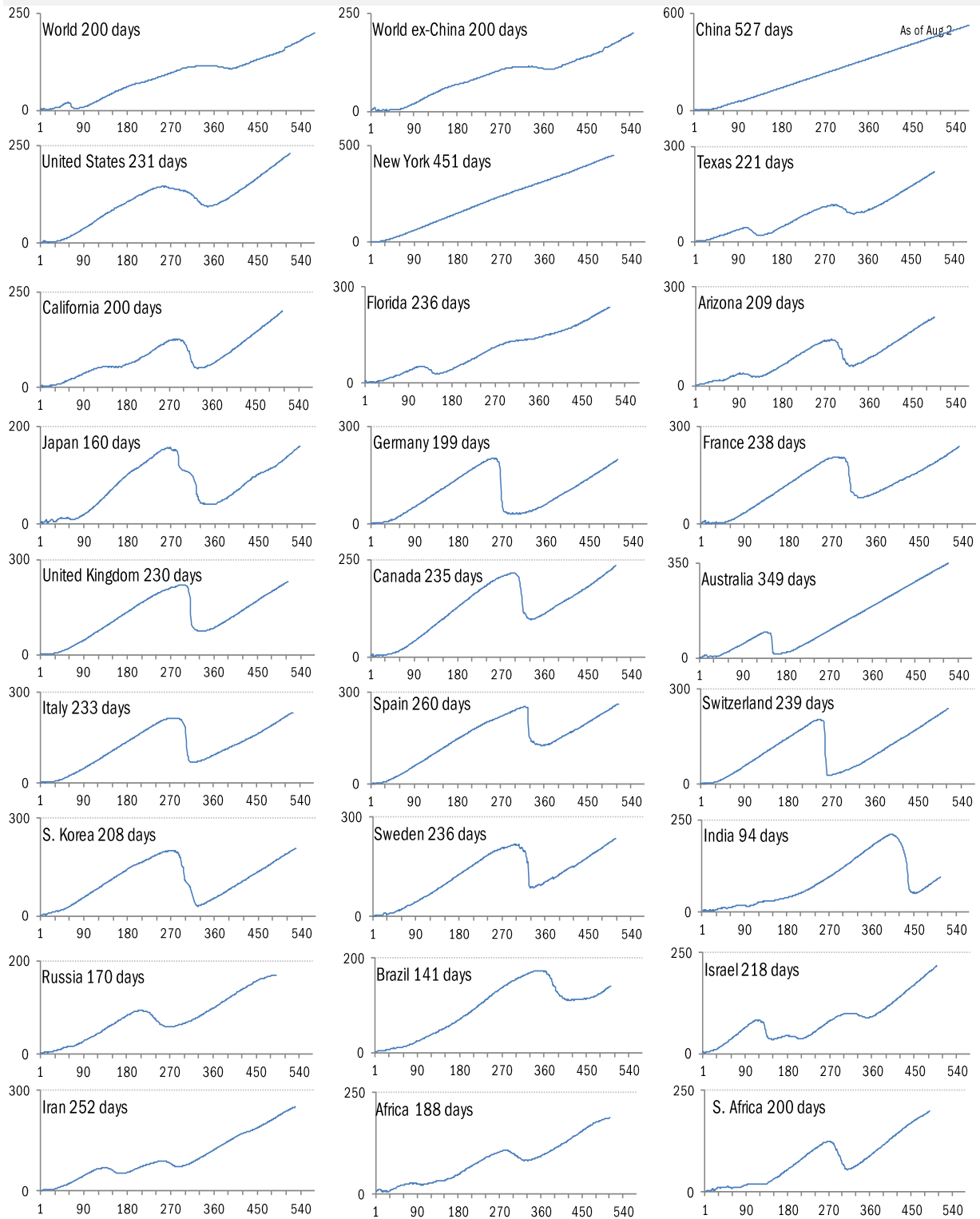


Source: [Johns Hopkins](#), TrendMacro calculations

"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

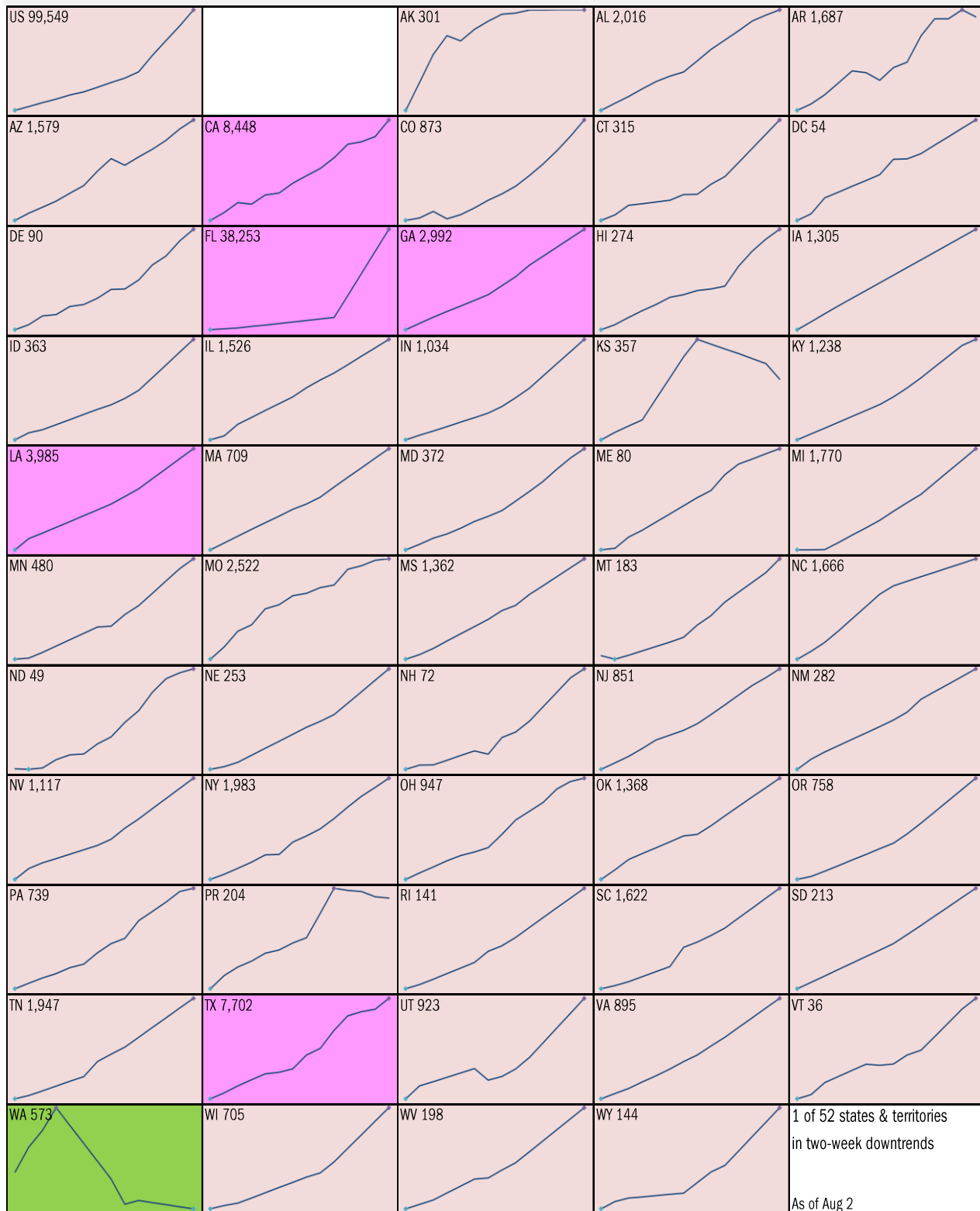


Source: [Johns Hopkins](#), TrendMacro calculations

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

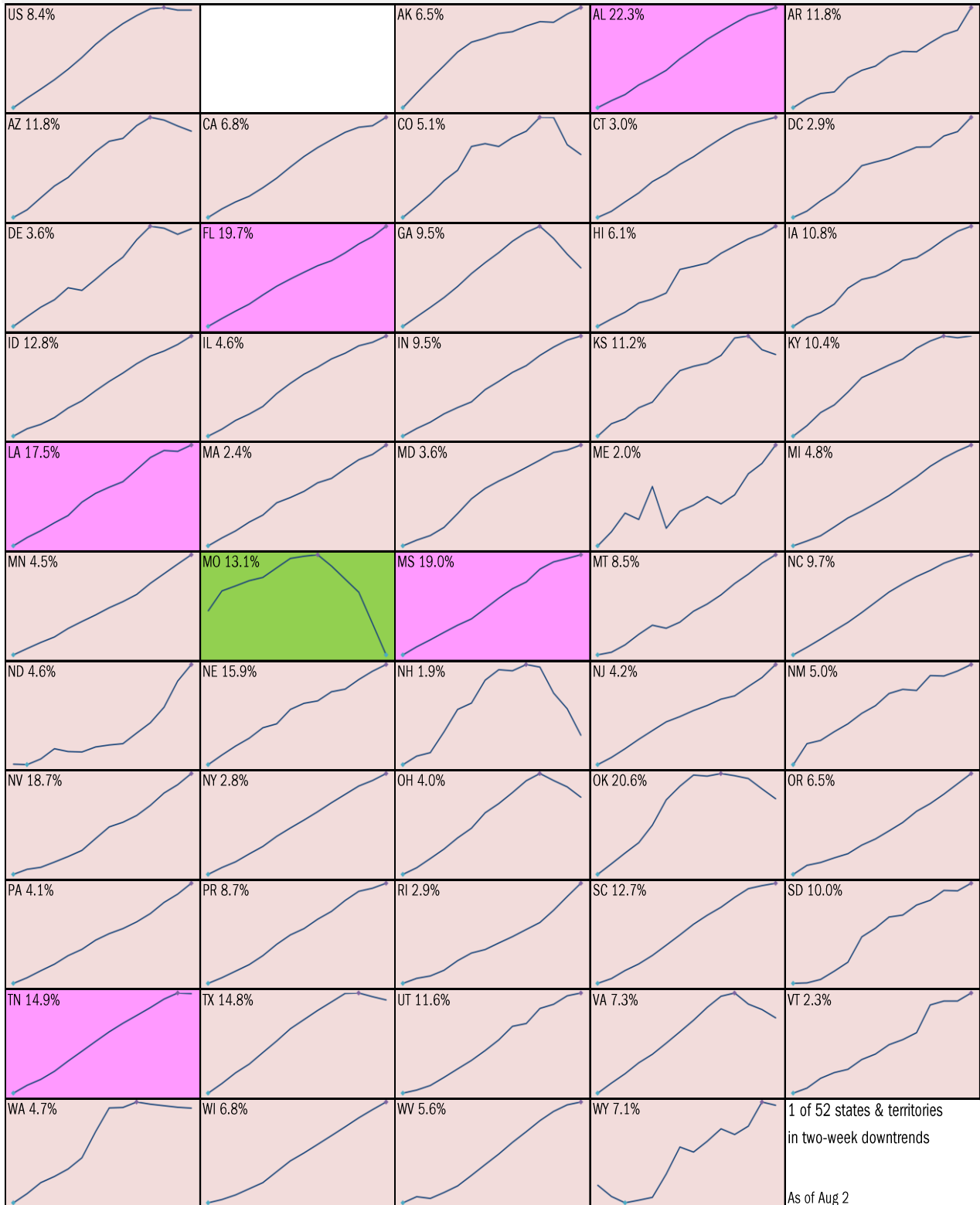


Source: [Johns Hopkins](#), TrendMacro calculations

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

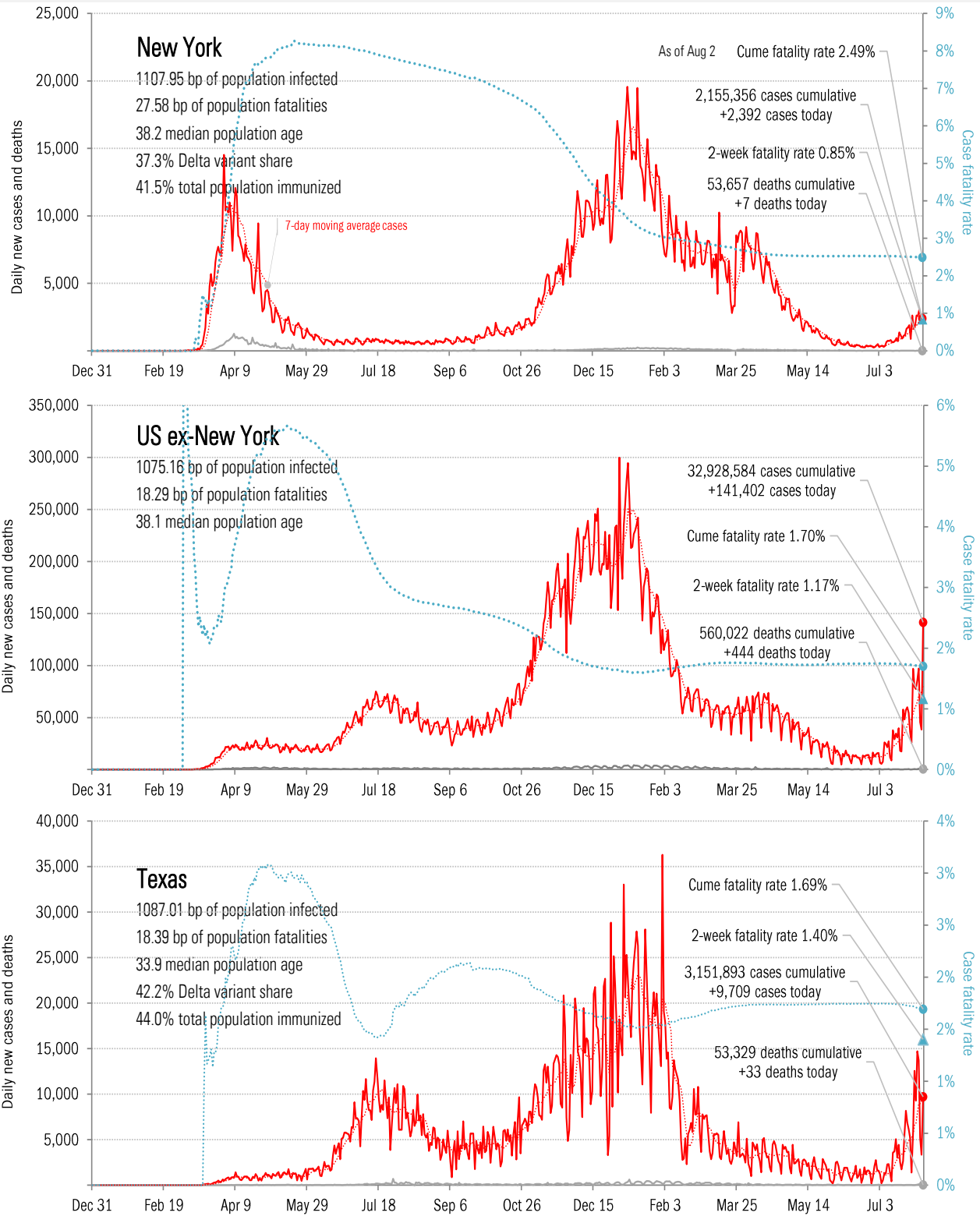
14-day moving average, last 14 days Most recent value displayed ● High ● Low

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



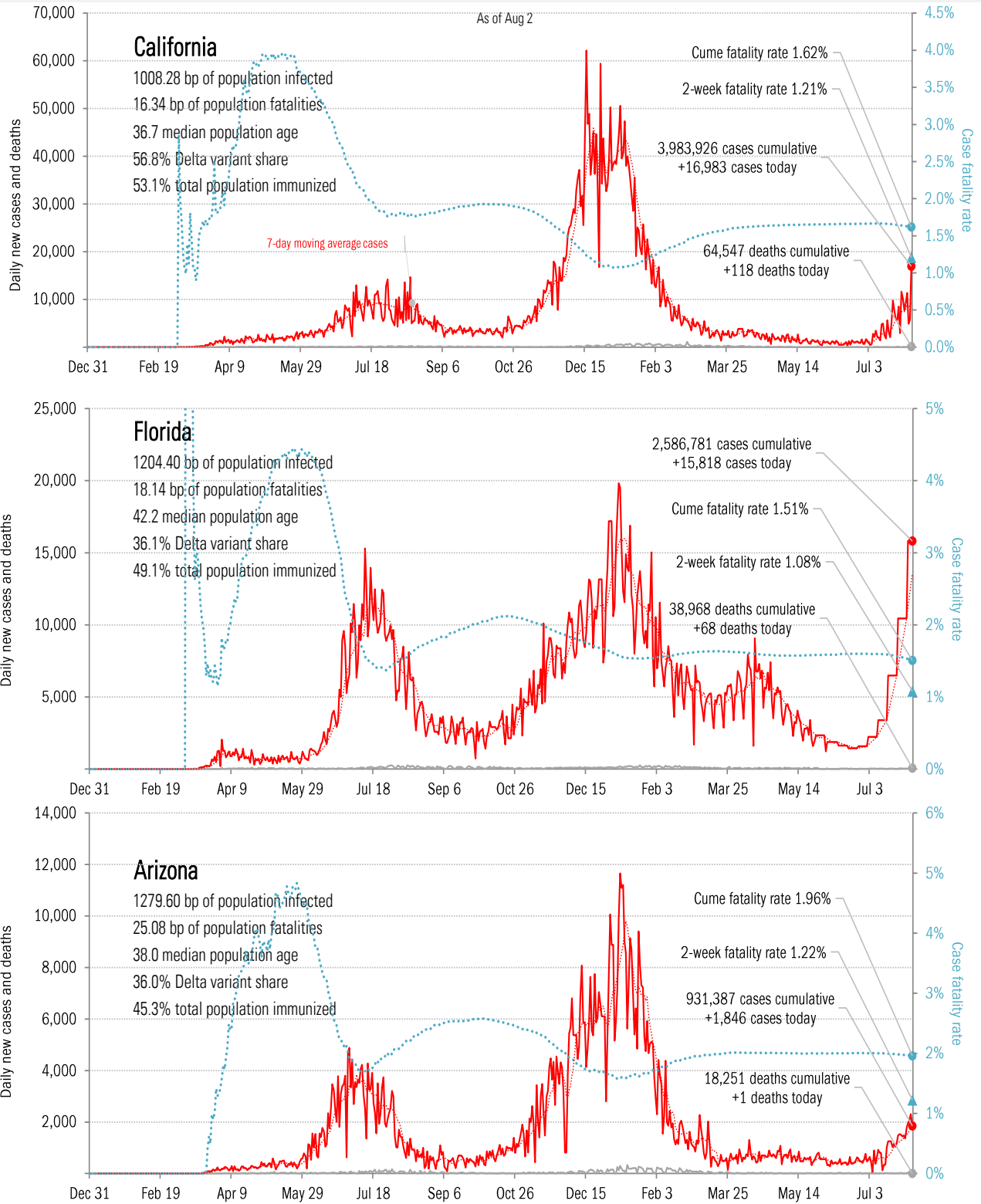
Source: [Covid Act Now](#), TrendMacro calculations

From Ground Zero to the Rio Grande



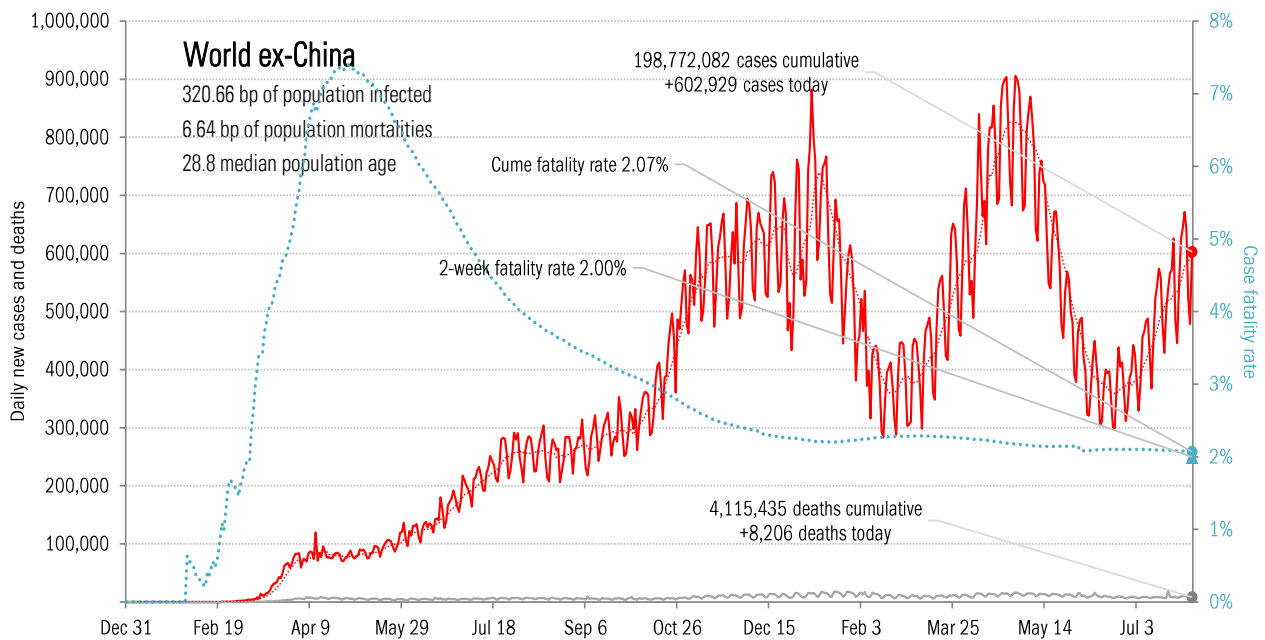
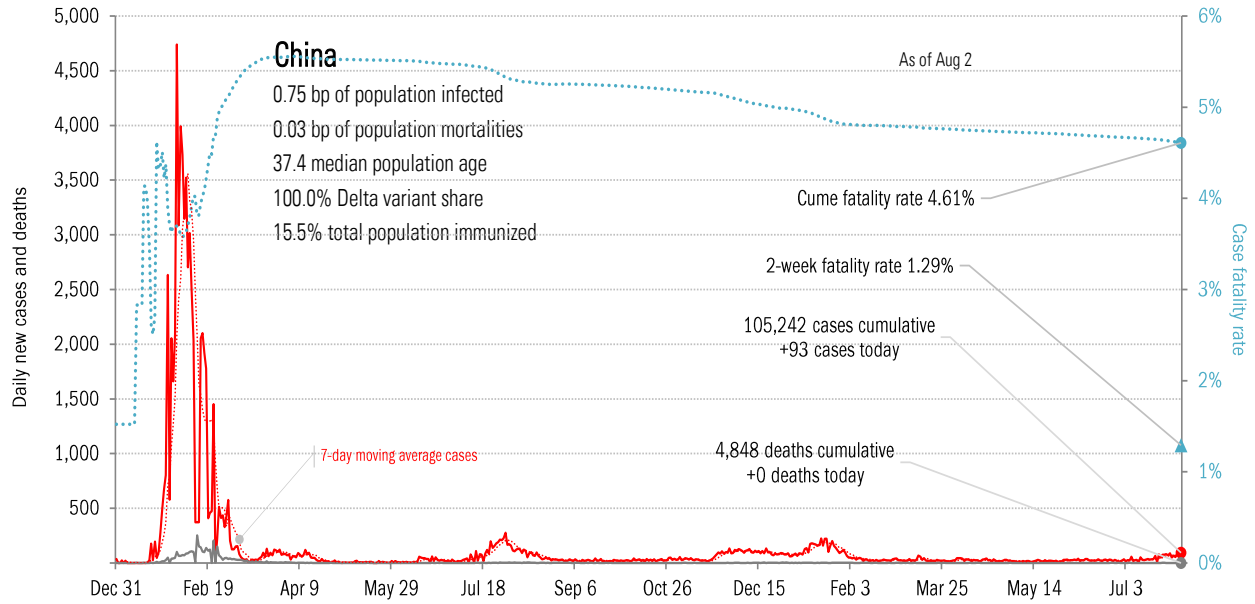
Source: [Johns Hopkins](#), TrendMacro calculations

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



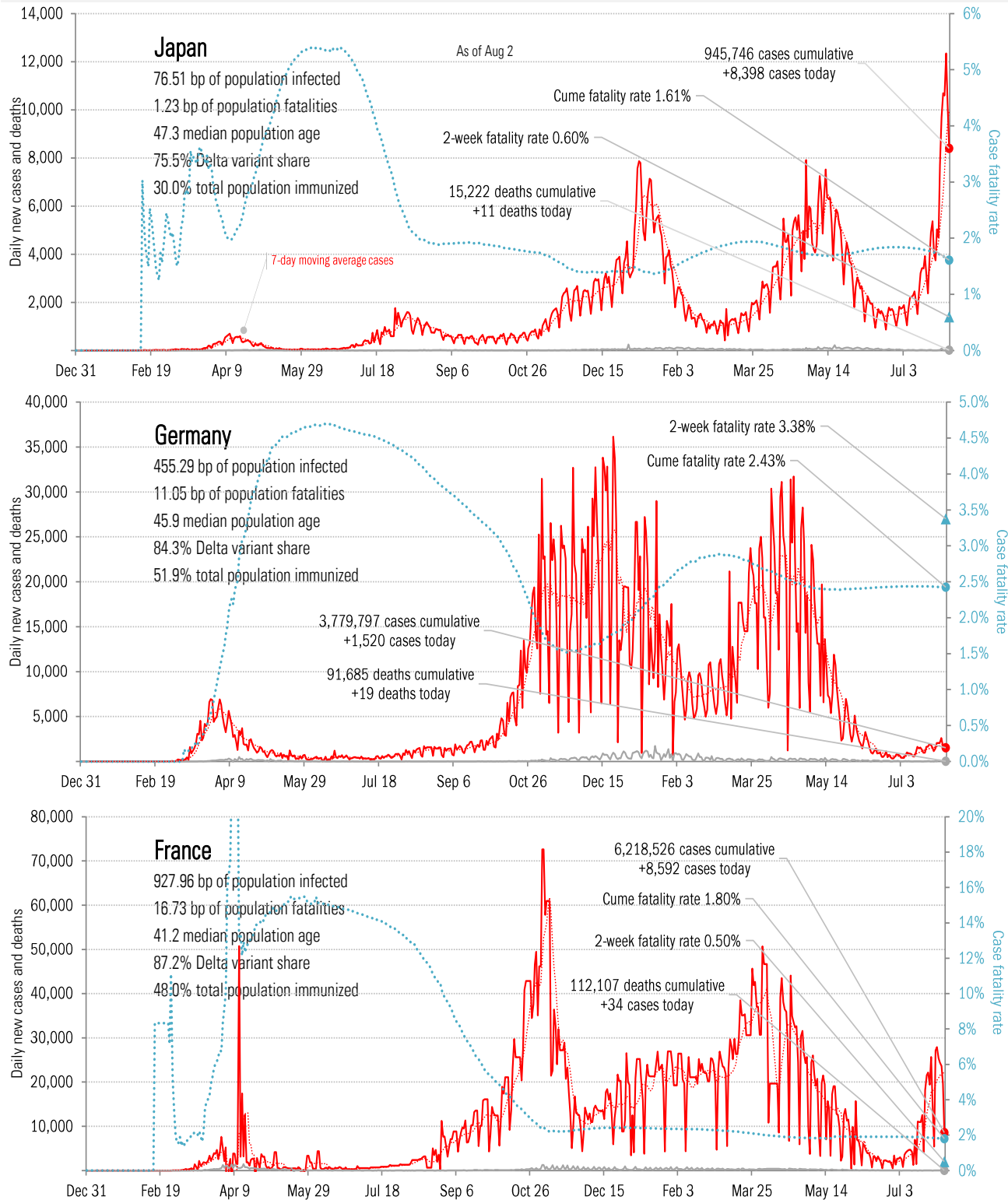
Source: [Johns Hopkins](#), TrendMacro calculations

Patient zero... and then everyone else



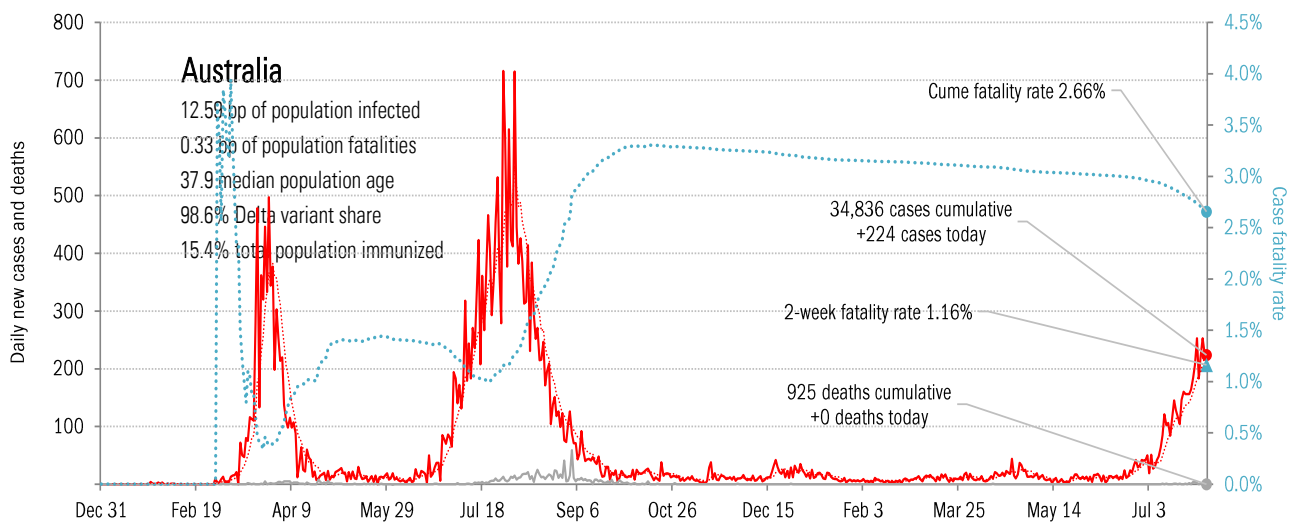
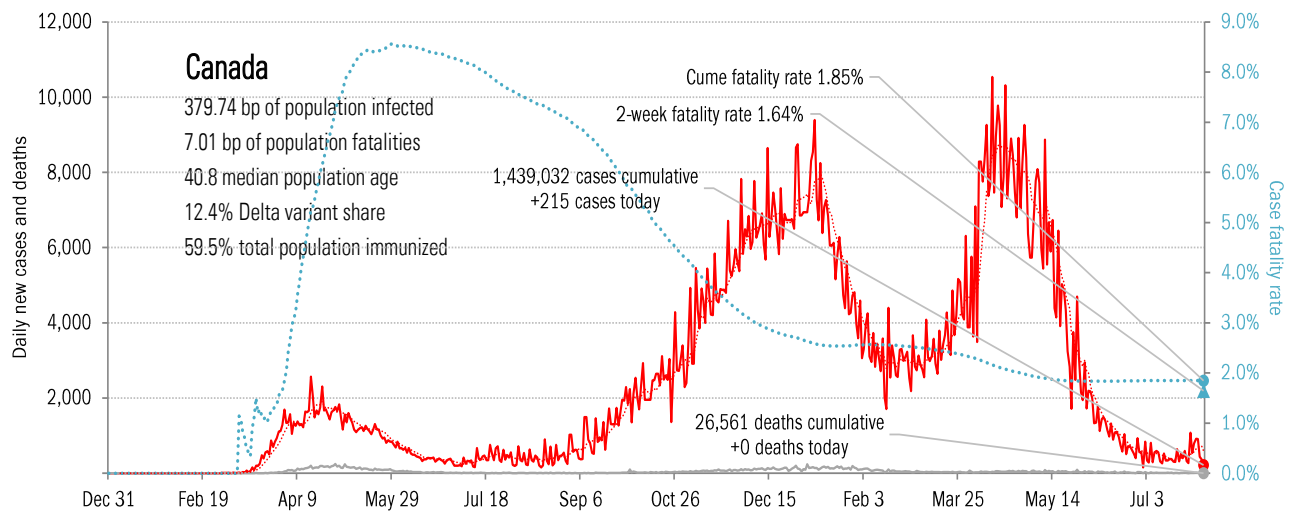
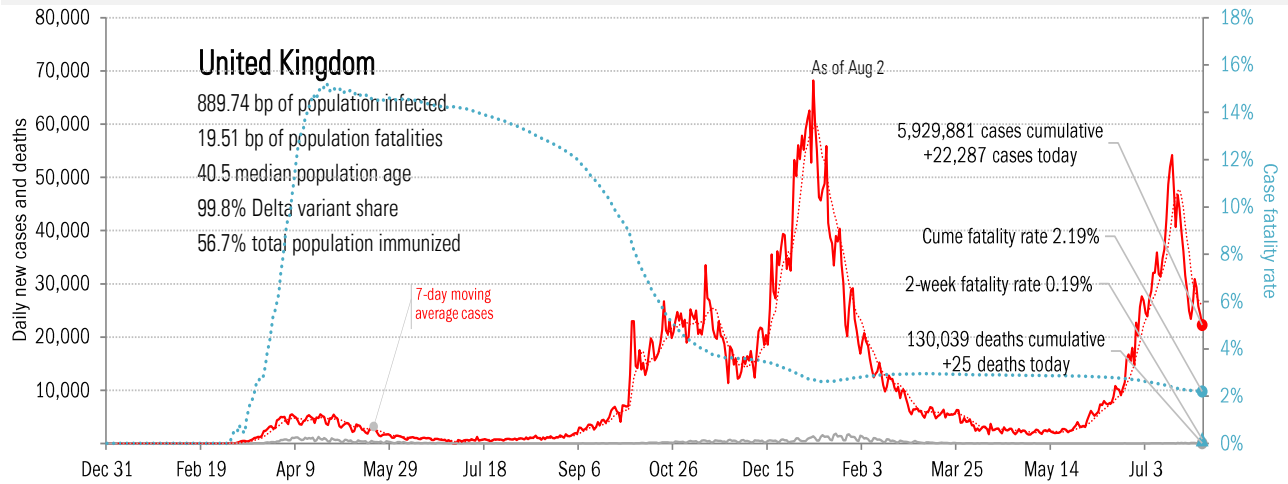
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the largest economies



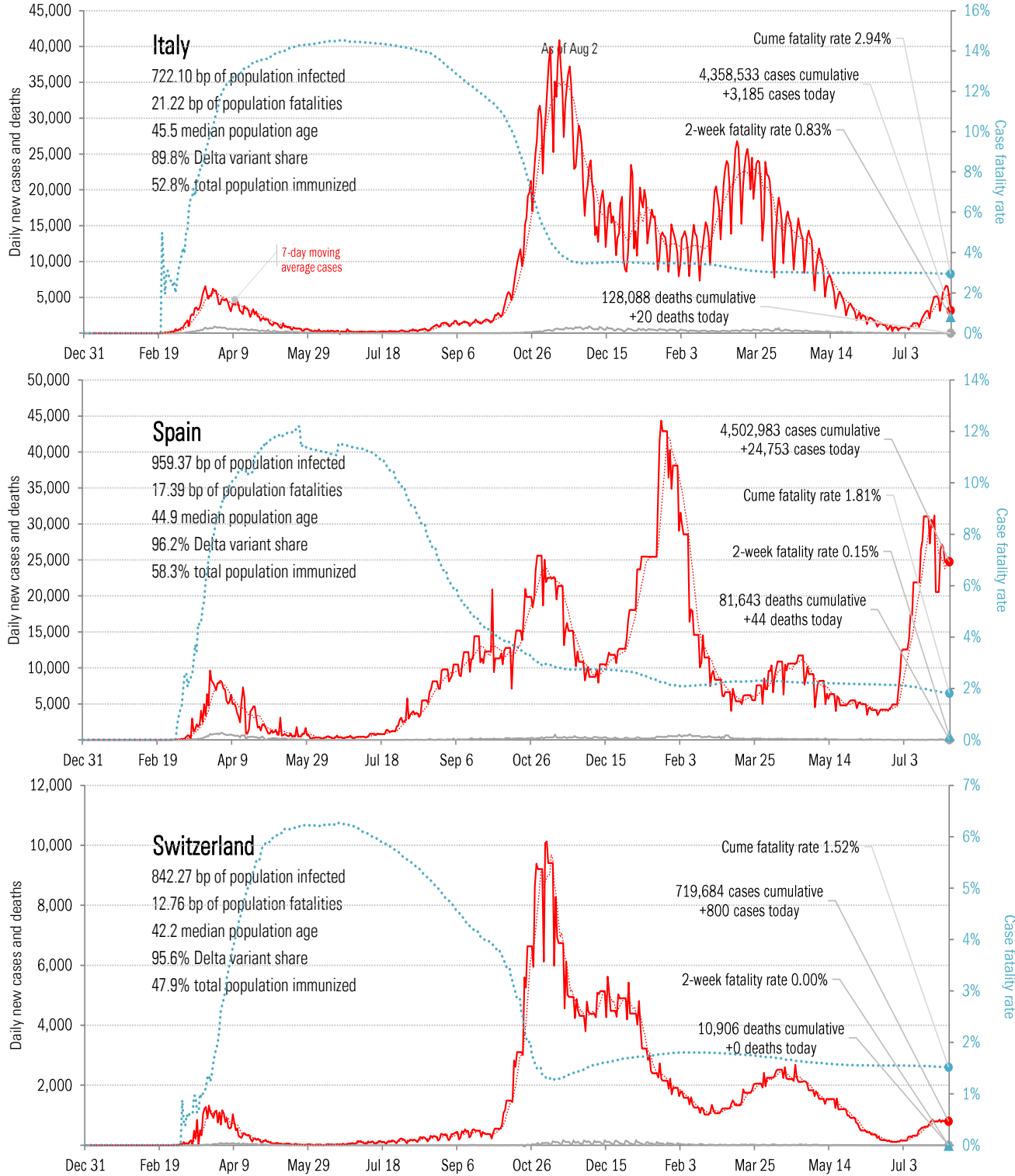
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in The Anglosphere



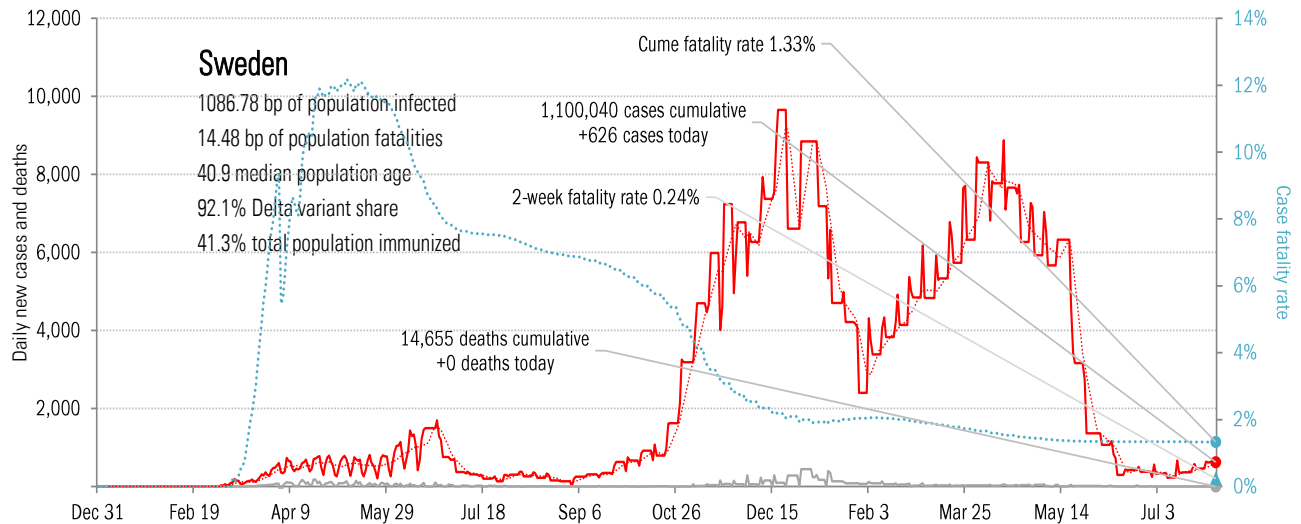
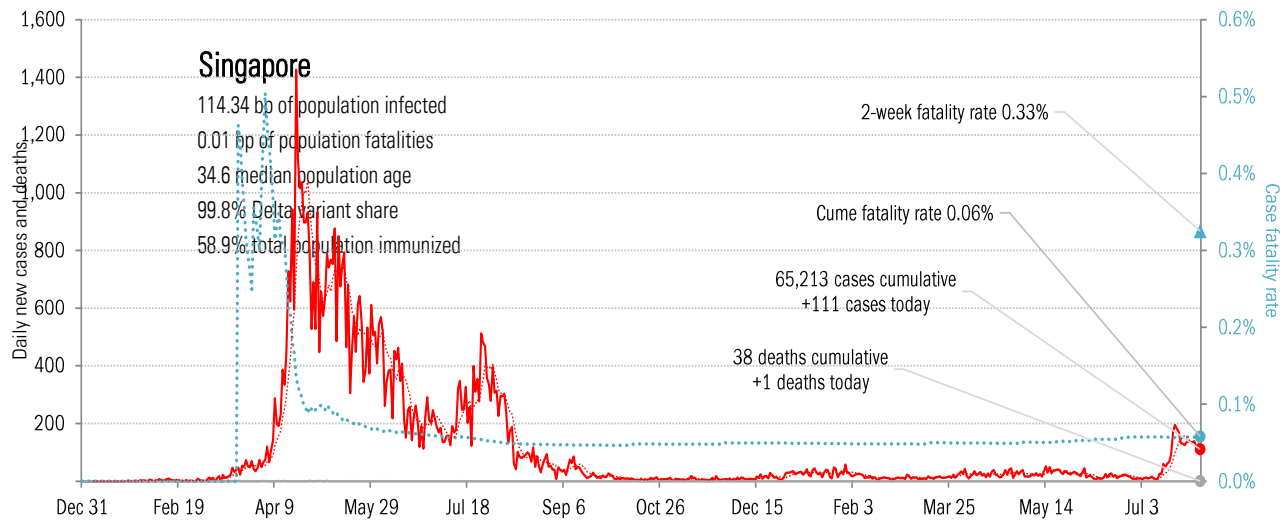
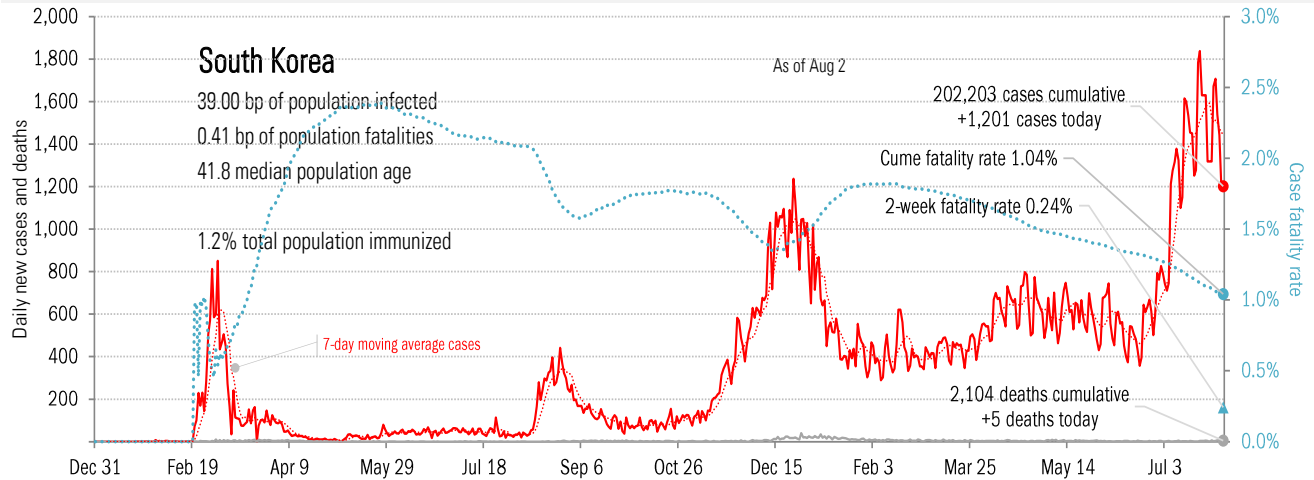
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in continental Europe



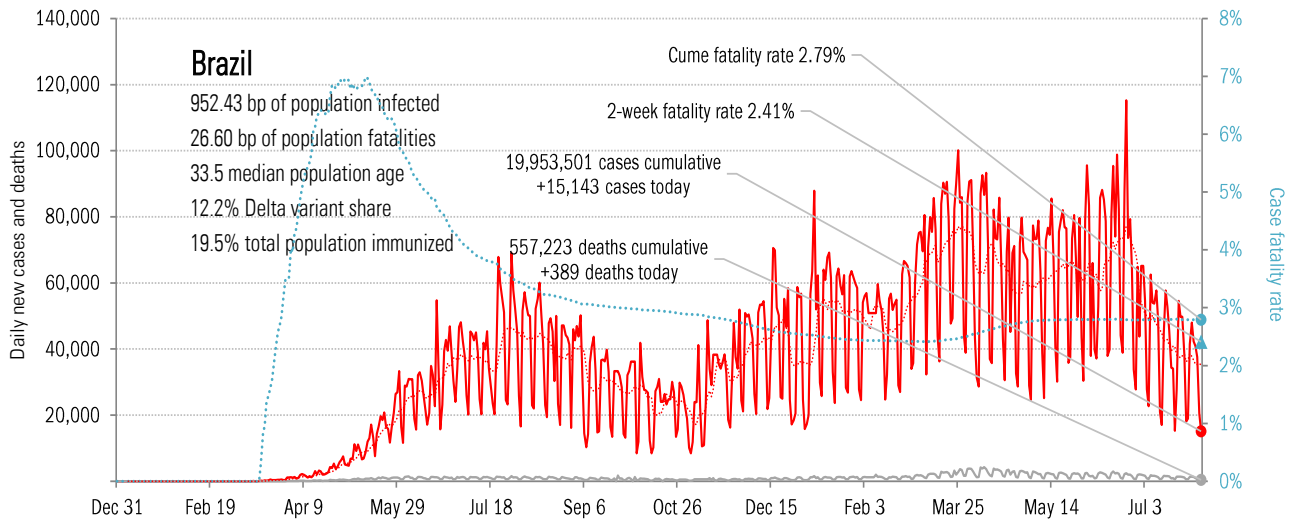
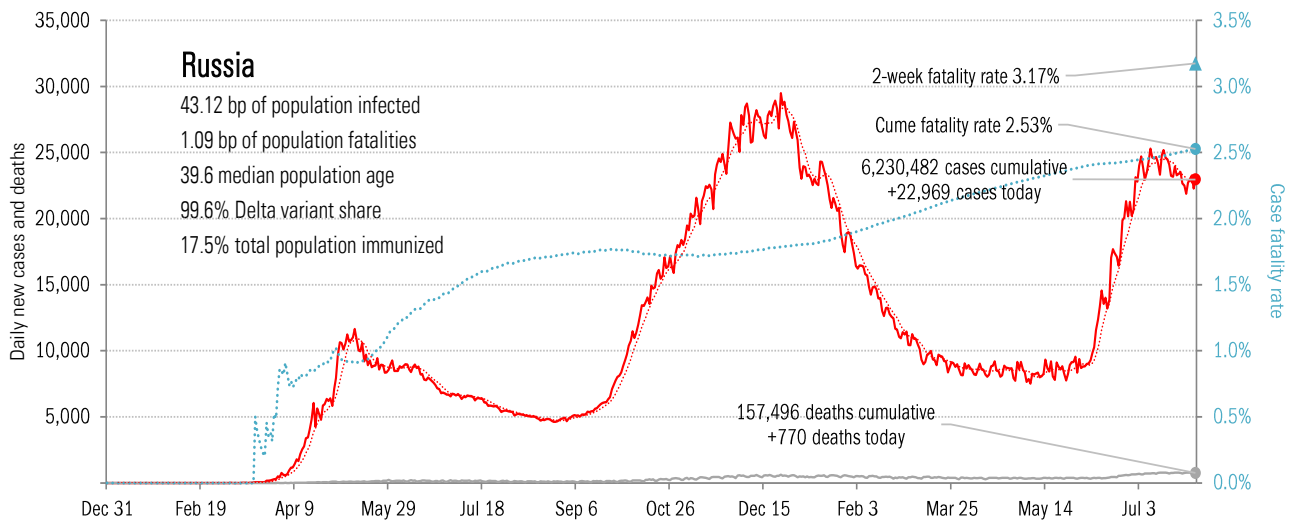
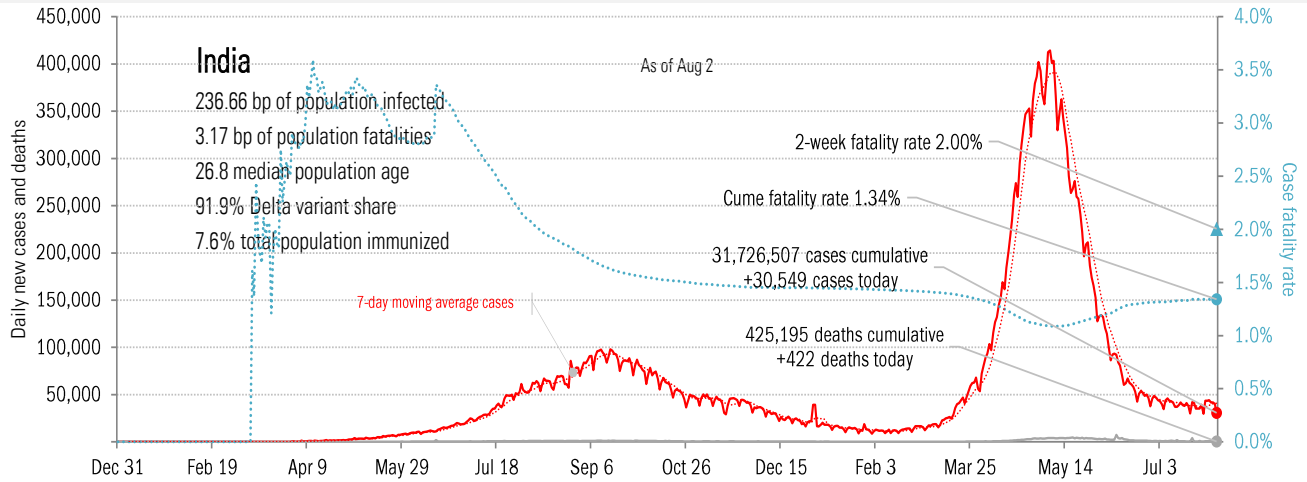
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in other hot-spots



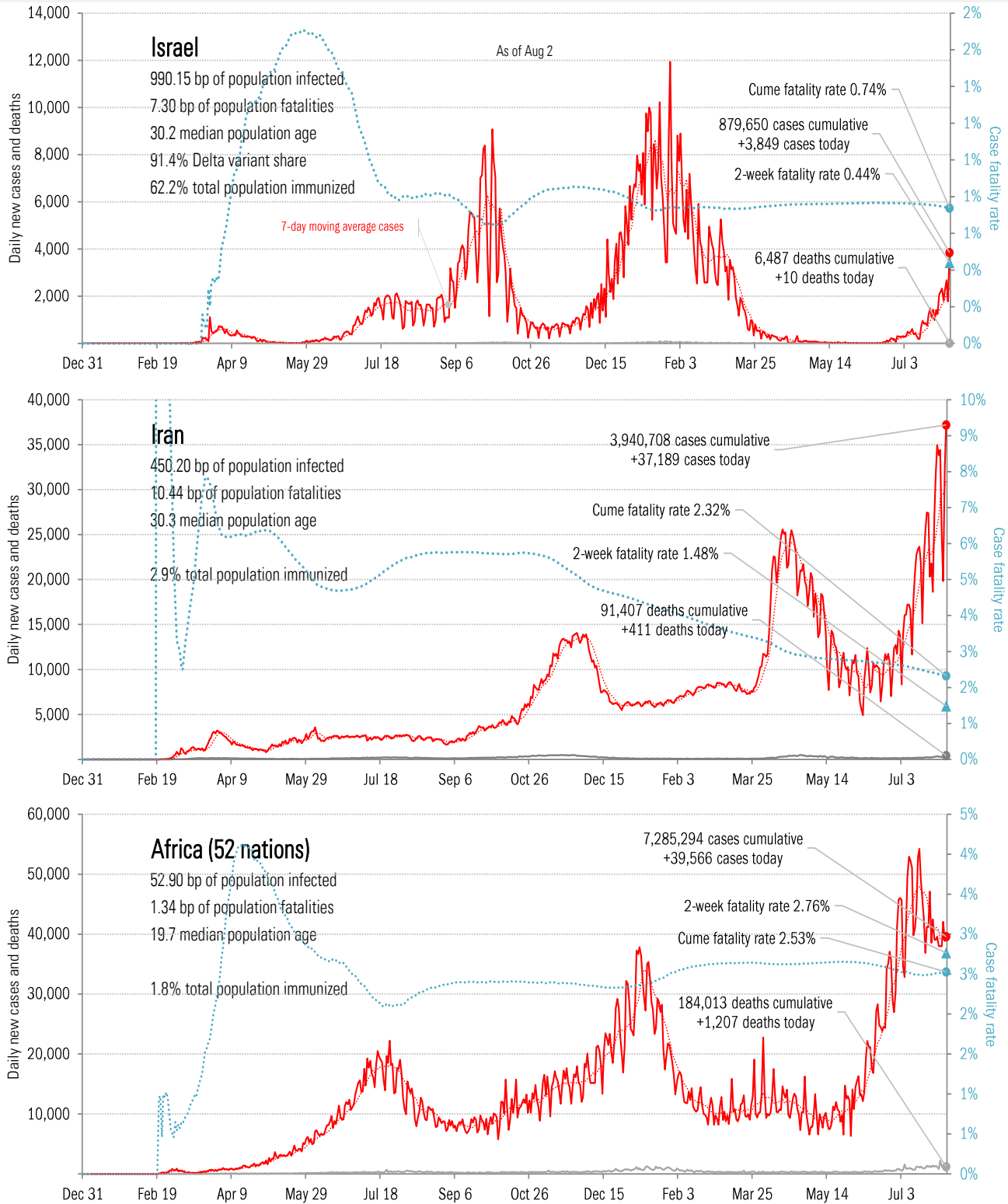
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the BRICs ex-China



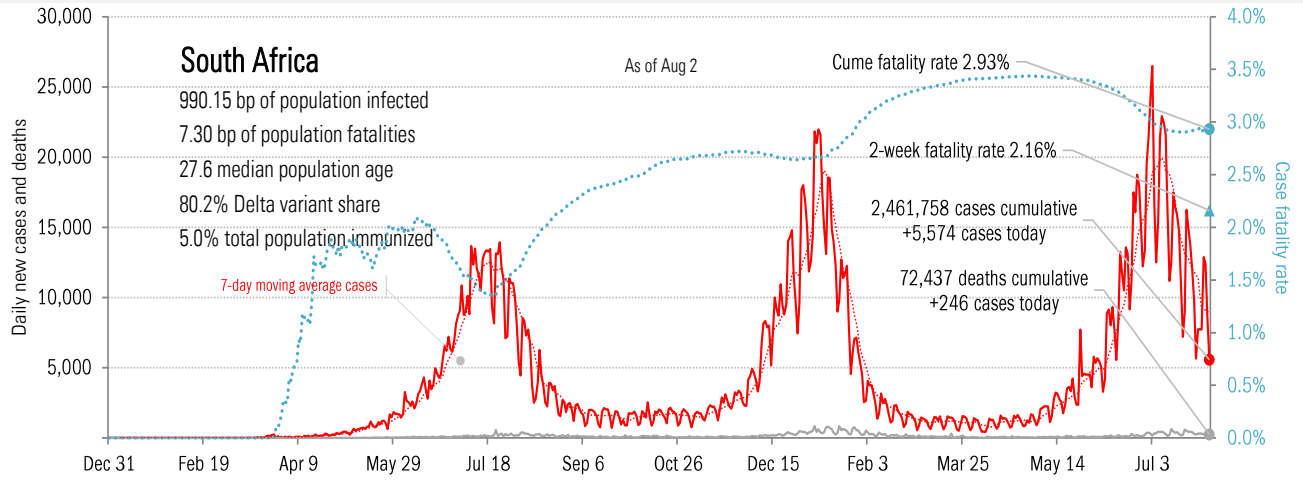
Source: [Johns Hopkins](#), TrendMacro calculations

Impact in the Middle East and Africa



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

Impact in Africa, continued



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