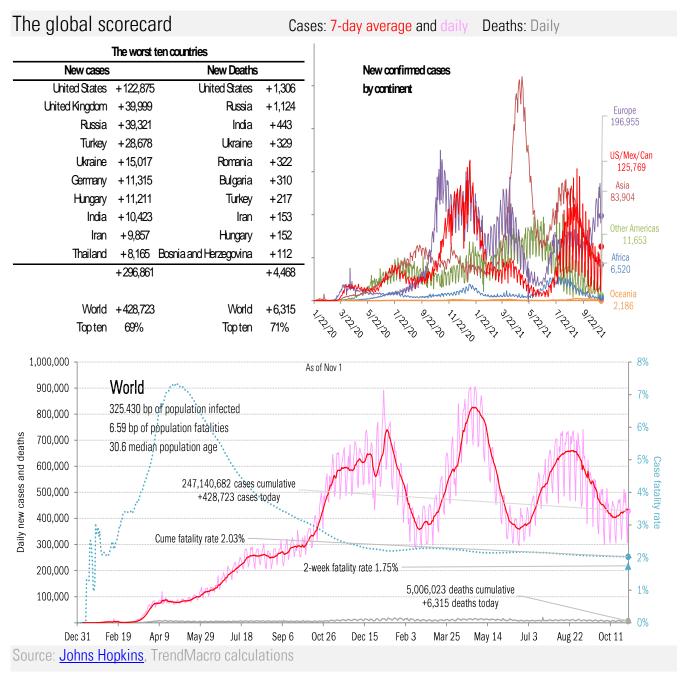


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

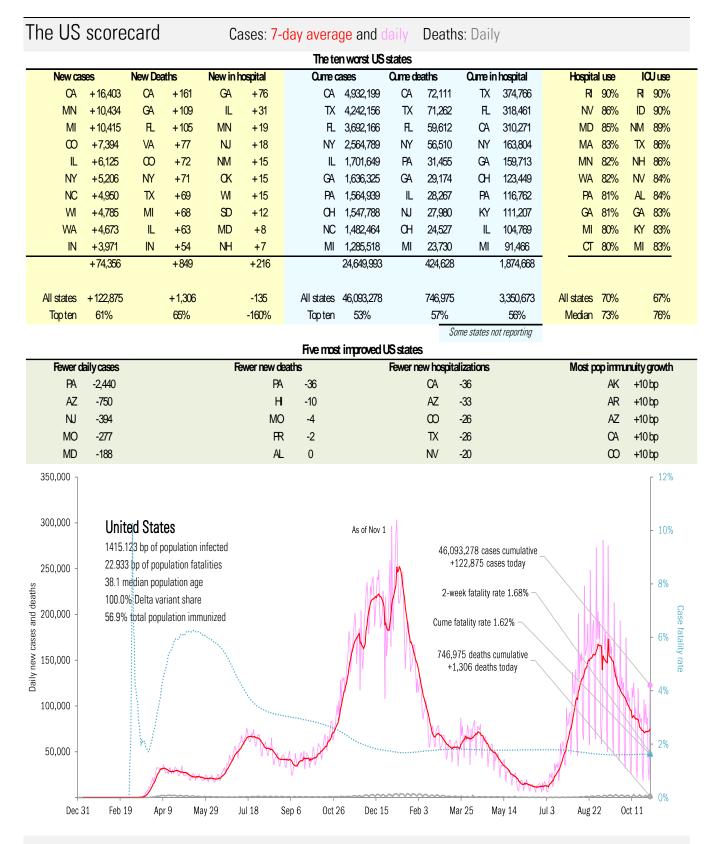
Data Insights: Covid-2019 Monitor

Tuesday, November 2, 2021



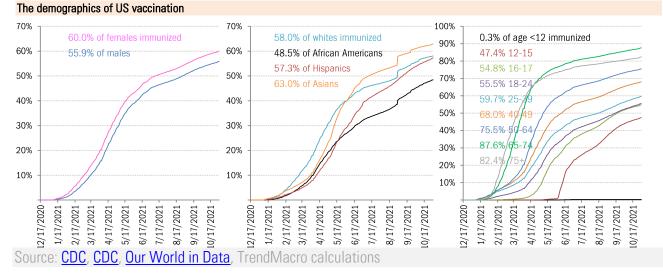
For more information contact us: Donald Luskin: 312 273 6766 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 <u>tdemas@trendmacro.com</u>

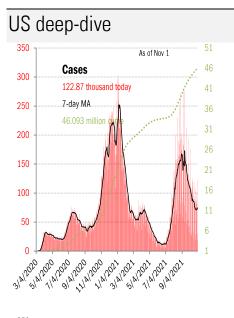
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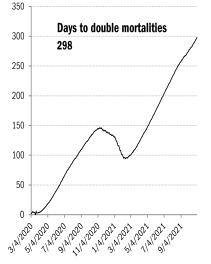


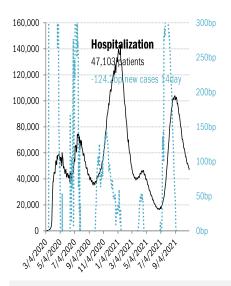
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

Rolling out the vaccines in the US and the world												
Administered Cumulative								day	Immunity	Full	Partial	
Doses	434,832,356						+0.952	million	US	56.9%	65.9%	
Boosters	loosters 19,502,88		19,502,883					+0.579 million		UK	67.0%	73.3%
		One dose		% Pop Immune		nune	% рор	New immune today		France	67.9%	75.7%
Total population		227,435,562		68%			59%	+0.136 million		Spain	79.8%	81.4%
Age 12 to 1	Age 12 to 17		14,188,792 60%		11,904,533		50%	+0.013 million		Germany	66.1%	68.8%
Age 18 to 6			57,101,452	77%			67%	+0.101 million		ltaly	71.5%	77.3%
Age 65 and	Age 65 and over		55,033,039 1009		48,315,833		88%	+0.021 million		Australia	64.7%	74.5%
1&I				Every American >18 immunized in					ed in	Israel	65.2%	71.0%
4%						67 days				Canada	74.4%	78.4%
		C+.	ata	Peat						Japan	72.8%	78.0%
Moderna		State		Best		by Jan 7, 2022 71.5% of population >18 immunized 16.4% previously tested positive				Africa	6.0%	8.9%
38%	Pfizer	At least partial immunity							India	23.8%	52.8%	
	58%	as % population		Midd	10				Brazil	56.4%	74.4%	
		Full immunity				88.0% vs 60% adult herd immu			imunity	China	74.1%	76.2%
AK		as % pc	opulation	Wors	st					Global data differ	s due to source	s, timing
59.6%						WI		As of Nov 1		ſ	ME	
52.7%						62.8%					76.8%	
						58.4%					70.6%	
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	69.4%	49.2%	56.9%	53.5%	65.3%	65.7%	58.3%		74.4%	79.9%	76.9%	
	63.5%	44.0%	50.5%	46.0%	59.9%	60.5%	53.6%		66.8%	71.3%	62.9%	
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		
	68.4%	63.5%	50.9%	62.1%	59.6%	53.8%	55.9%	78.3%	75.2%	80.4%		
	62.9%	53.0%	43.9%	52.6%	55.5%	49.9%	51.9%	60.6%	66.4%	69.7%		
	CA	UT	CO	NE	MO	KY	WV	VA	MD	CT	RI	
	74.7%	61.1%	67.8%	61.0%	56.9%	57.6%	49.0%	71.2%	73.1%	79.2%	78.3%	
	61.4%	53.6%	61.7%	56.2%	49.8%	50.8%	41.0%	63.2%	66.2%	70.8%	71.0%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		
		61.3%	72.3%	62.6%	58.1%	54.5%	64.7%	57.7%	74.9%	68.9%		
		53.2%	62.2%	53.3%	48.1%	47.7%	52.7%	50.1%	62.6%	59.7%		
				ОК	LA	MS	AL	GA				
				59.6%	53.9%	52.0%	54.6%	56.9%				
HI				50.1%	47.7%	45.7%	44.8%	48.2%				
78.8% 59.8%				TX					FL	l í	PR	
			61.5%					69.2%		82.2%		
				53.4%					59.8%		73.6%	
The demographics of US vaccination												



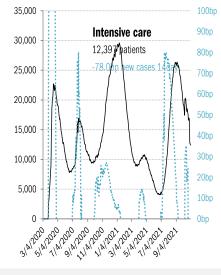


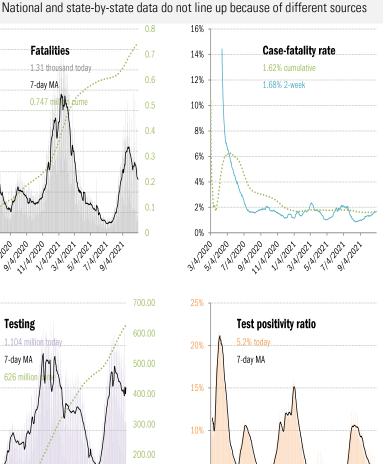


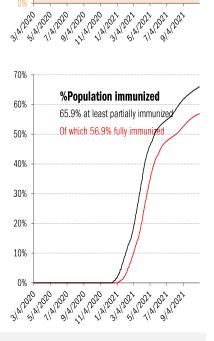




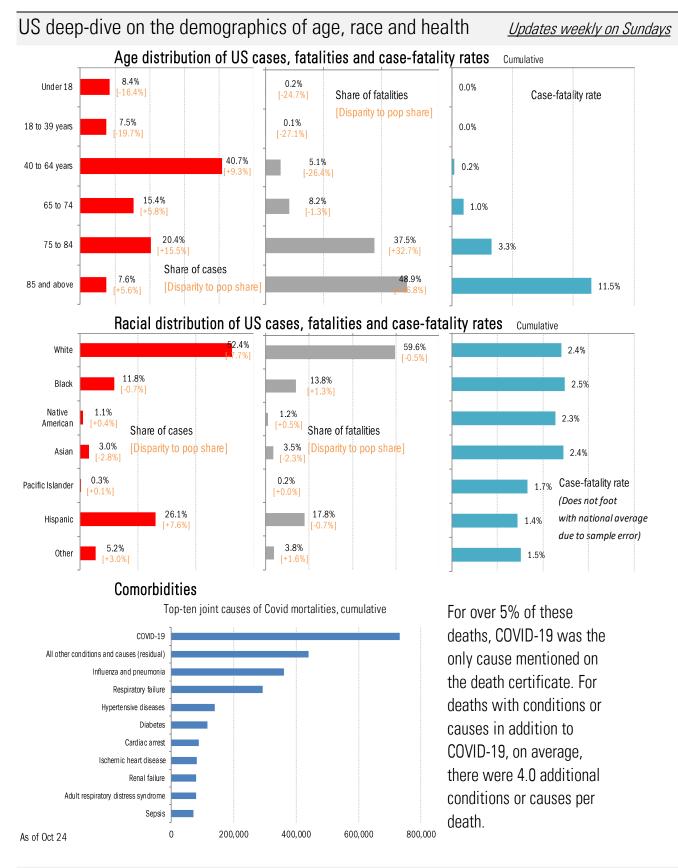








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



Source: Distributions <u>CDC</u>, Comorbidities <u>CDC</u>, TrendMacro calculations

Recommended reading

Dallas Parents Hire Billboard Trucks To Blast Diocese School Mask Mandate

Mairead Elordi *Daily Wire* October 26, 2021

How Often Do Covid Vaccines Cause Heart Problems in Kids? Apoorva Mandavilli

Apoorva Mandavilli *New York Times* November 1, 2021

How Fauci Fooled Americ

Martin Kulldorff and Jay Bhattacharya *Newsweek* November 1, 2021

October 31, 2021

A judge blocks Chicago from enforcing its vaccine mandate for police officers.

Mitch Smith *New York Times* November 1, 2021

N.Y.C.'s vaccination rate for city workers climbs to 91 percent, and 9,000 are put on unpaid leave.

Joseph Goldstein, Ashley Southall and Emma G. Fitzsimmons *New York Times* November 1, 2021

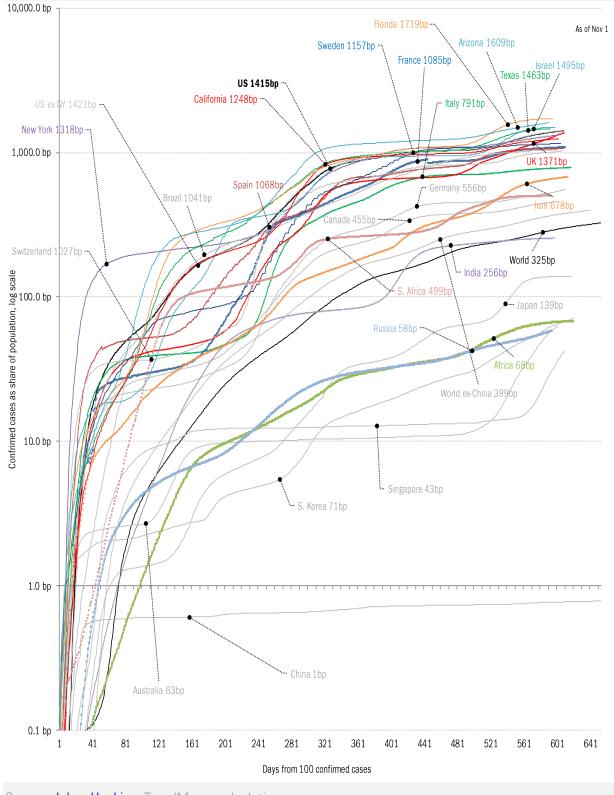
When in Rome, eh Joe! How the President appears happy to lose the mask in Europe yet insists on wearing it even when surrounded by vaccinated staff at the White House Elizabeth Elkind Daily Mail

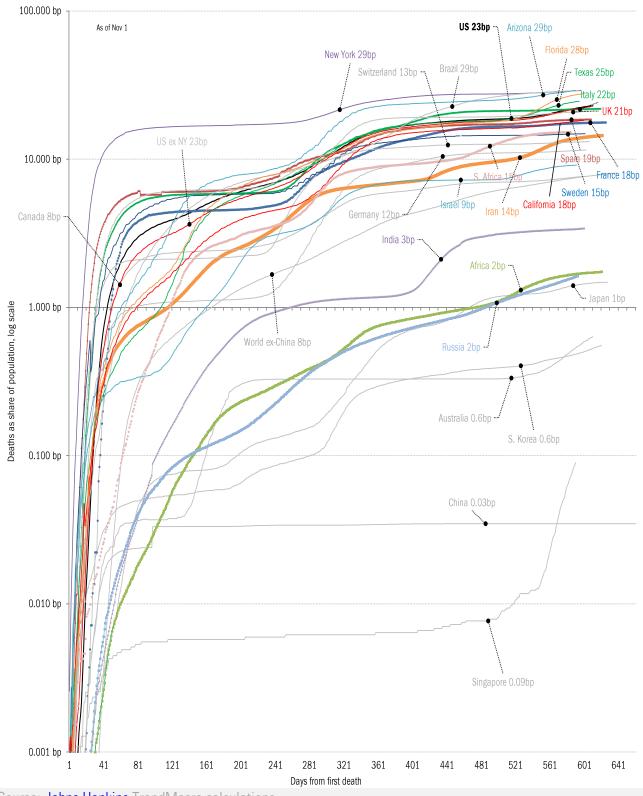
Meme of the day



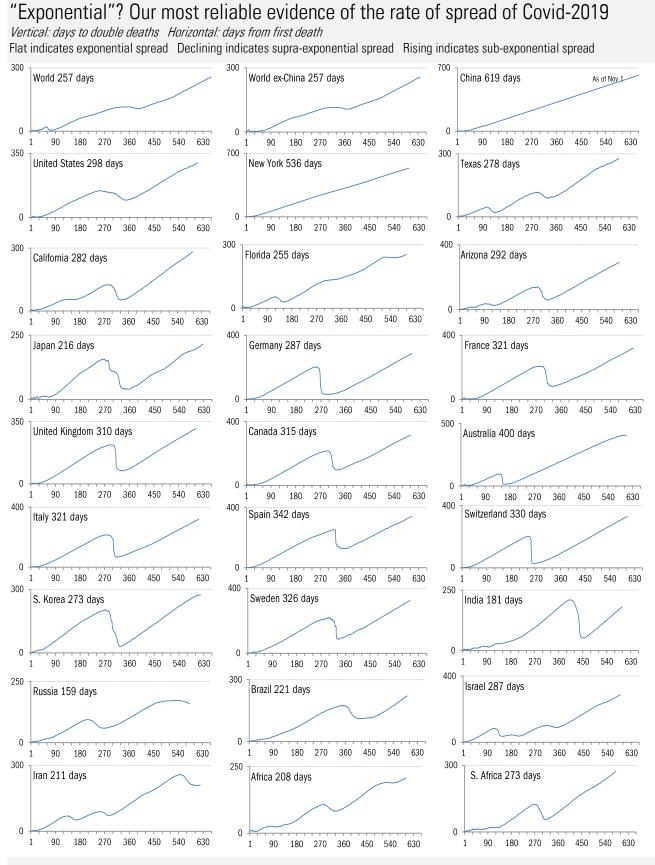
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

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

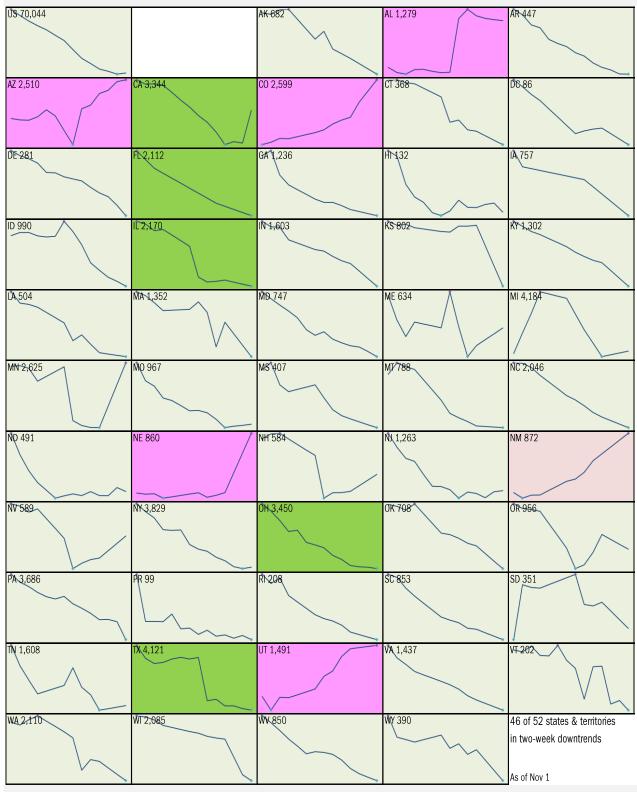




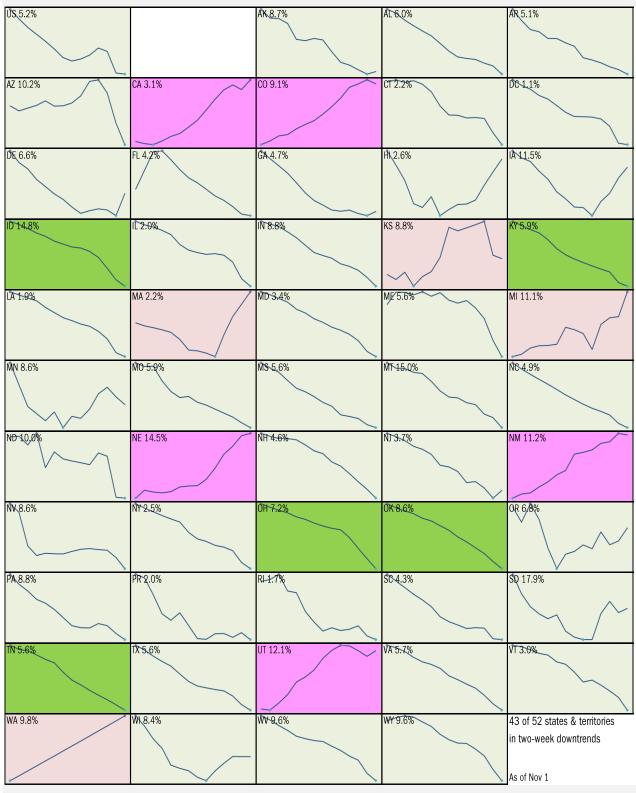
The coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale*



Requirement to <u>Open Up America Again</u>: 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



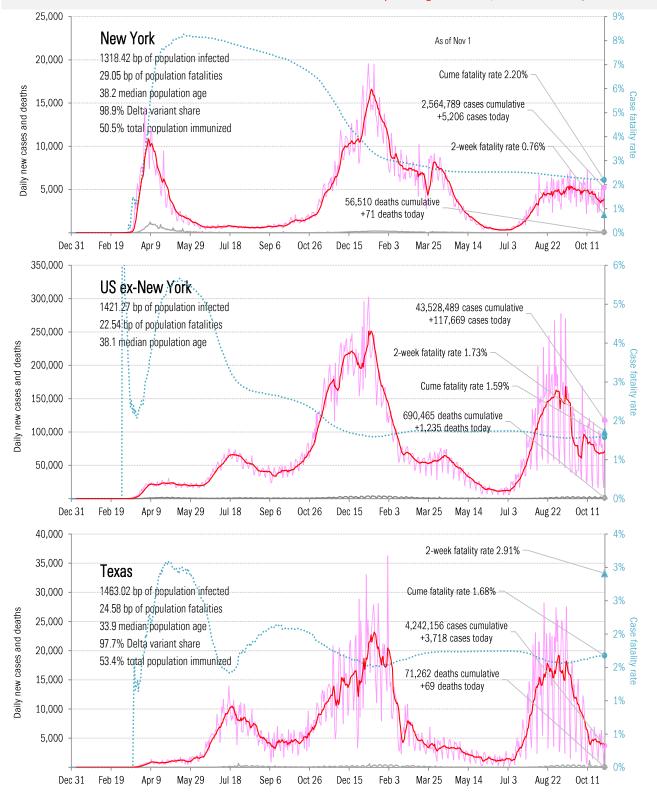
Alt requirement to <u>Open Up America Again</u>: 14-day "downward trajectory" in pos tests *14-day moving average, last 14 days Most recent value displayed* • High • Low Downward trajectory Five best Upward trajectory Five worst



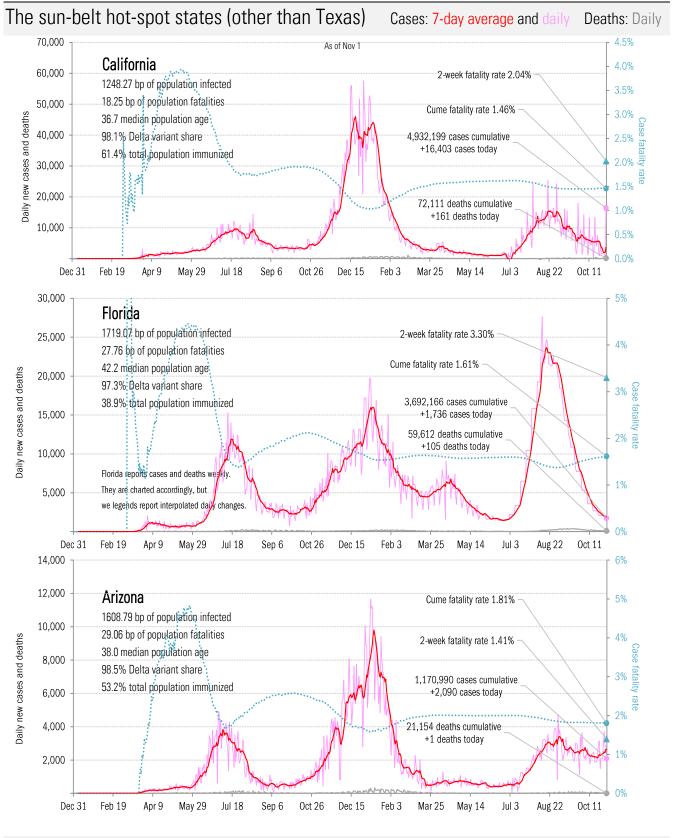
Source: Covid Act Now, TrendMacro calculations

From Ground Zero to the Rio Grande

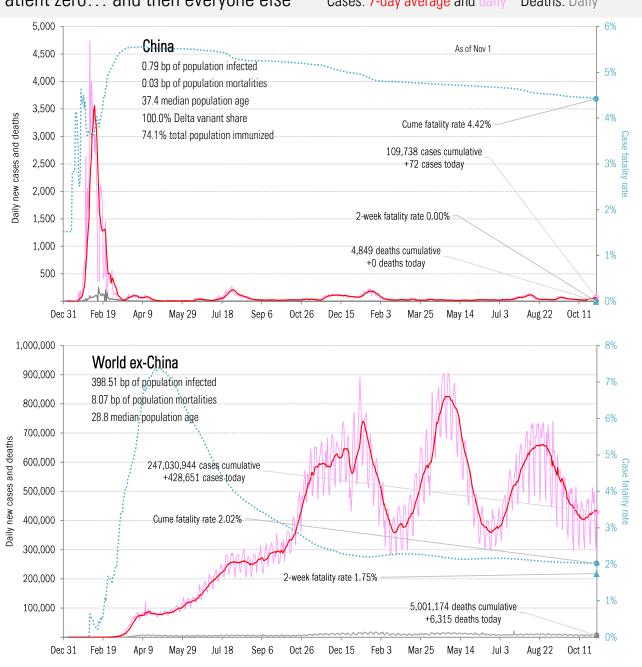
Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations



Source: Johns Hopkins, TrendMacro calculations

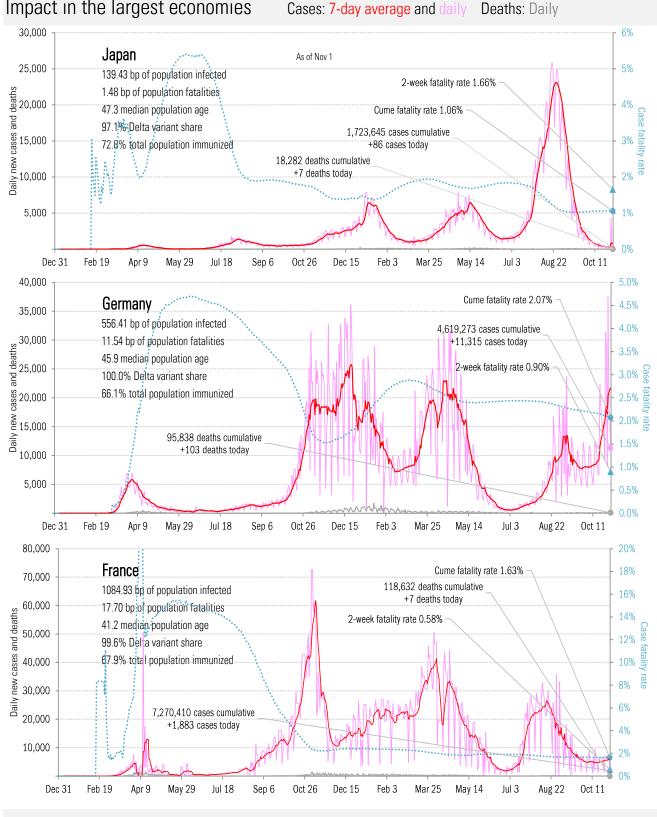


Patient zero... and then everyone else

Cases: 7-day average and daily Deaths: Daily

Source: Johns Hopkins, TrendMacro calculations

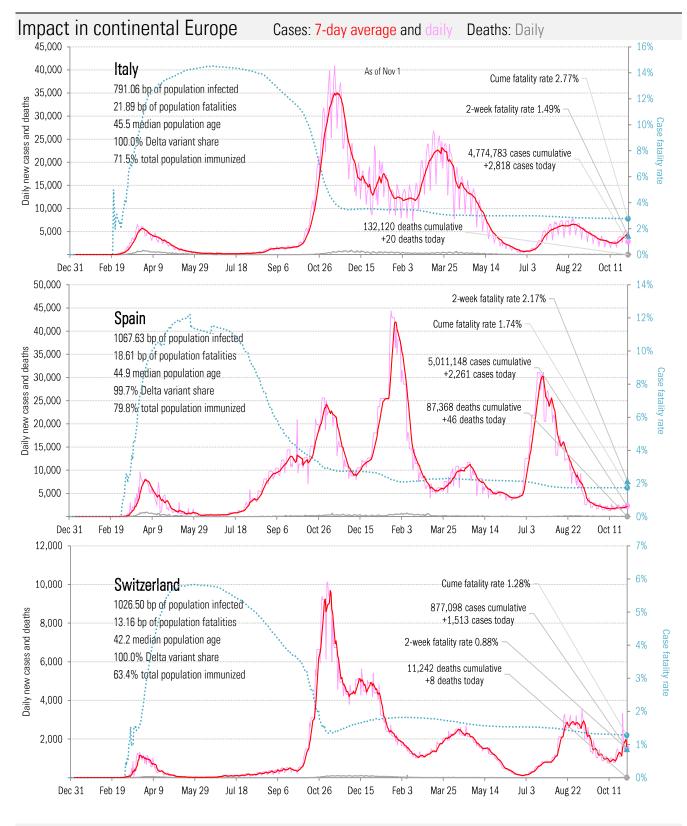
Impact in the largest economies Cases: 7-day average and daily

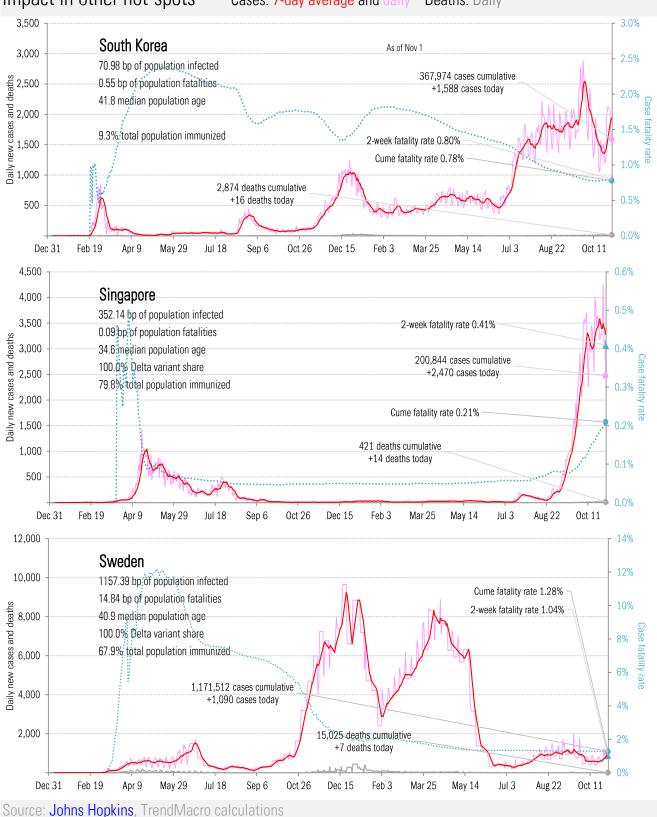


Source: Johns Hopkins, TrendMacro calculations

Impact in The Anglosphere Cases: 7-day average and daily Deaths: Daily 80,000 18% United Kingdom 16% 70,000 As of Nov 1 1371.47 bp of population infected strap pure set 60,000 50,000 \$80 Met 20,000 30,000 14% 21.17 bp of population fatalities 9,140,441 cases cumulative 12% +39,999 cases today 40.5 median population age 100.0% Delta variant share 10% fatality 67.0% total population immunized Cume fatality rate 1.54% 8% rate 6% 2-week fatality rate 0.36% Alia 20,000 4% 1,098 deaths cumulative 10,000 43 deaths today 2% 0% Apr 9 Dec 15 Dec 31 Feb 19 May 29 Jul 18 Sep 6 Oct 26 Feb 3 Mar 25 May 14 Aug 22 Oct 11 Jul 3 12,000 9.0% 1,725,362 cases cumulative Canada 8.0% +2,894 cases today 10,000 455.30 bp of population infected 7.0% 7.67 bp of population fatalities Cume fatality rate 1.68% Daily new cases and deaths 8,000 6.0% 40.8 median population age 99.8% Delta variant share 2-week fatality rate 1.01% 5.0% 6,000 74.4% total population immunized 4.0% 4,000 3.0% 2.0% 2,000 29,052 deaths cumulative 1.0% +30 deaths today 0.0% Dec 31 Feb 19 Apr 9 May 29 Jul 18 Sep 6 Oct 26 Dec 15 Feb 3 Mar 25 May 14 Jul 3 Aug 22 Oct 11 3,000 4.5% Australia 4.0% 2,500 62 59 bp of population infected 3.5% 0.63 bp of population fatalities Daily new cases and deaths 2,000 379 median population age 173,165 cases cumulative 100.0% Delta variant share +1,135 cases today 2.5% 1,500 64.7% total population immunized 2.0% Cume fatality rate 1.01% 1,000 1.5% 2-week fatality rate 0.63% 1.0% 500 1,756 deaths cumulative 0.5% +13 deaths today 0.0% Jul 3 Dec 31 Feb 19 Apr 9 May 29 Jul 18 Sep 6 Oct 26 Dec 15 Feb 3 Mar 25 May 14 Aug 22 Oct 11

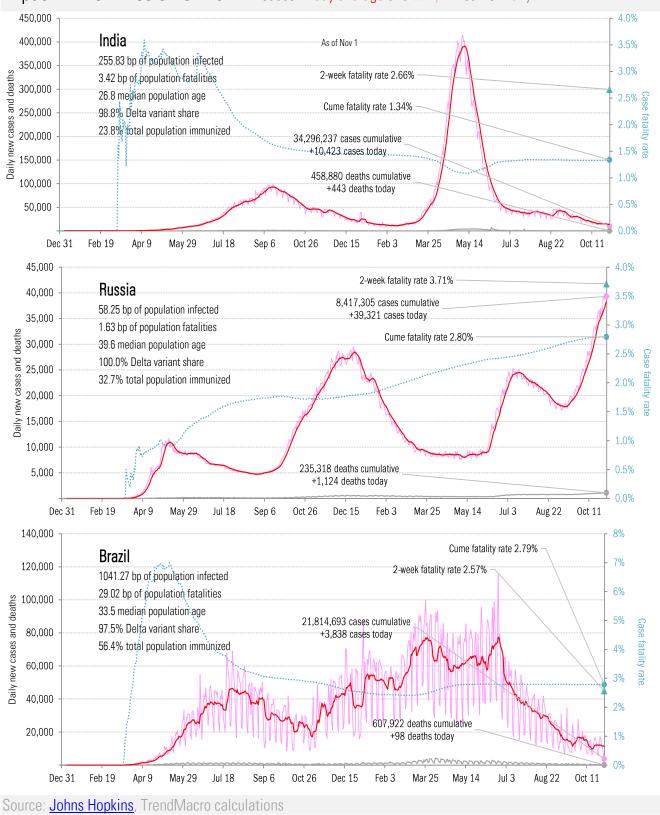






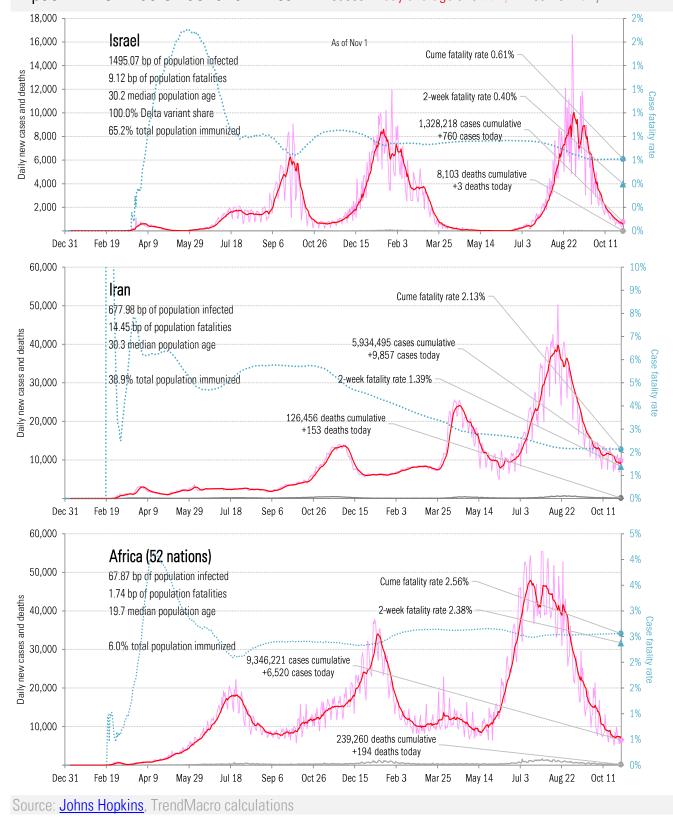
Impact in other hot-spots Cases: 7-day average and daily Deaths: Daily

Impact in the BRICs ex-China Cases: 7-day average and daily Deaths: Daily

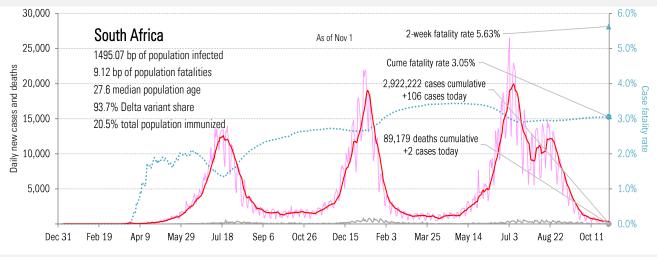


Impact in the Middle East and Africa

Cases: 7-day average and daily Deaths: Daily







Source: Johns Hopkins, TrendMacro calculations