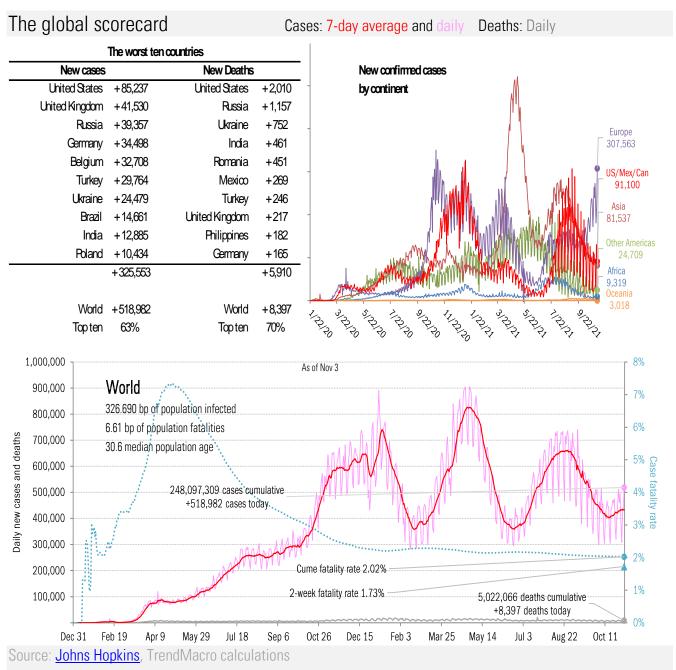


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

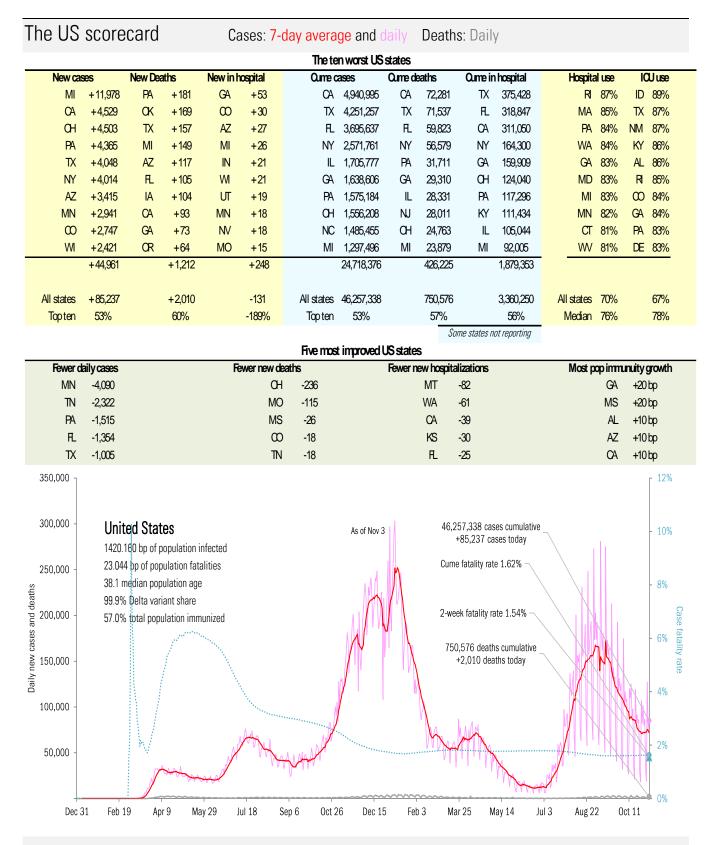
#### Data Insights: Covid-2019 Monitor

Thursday, November 4, 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>

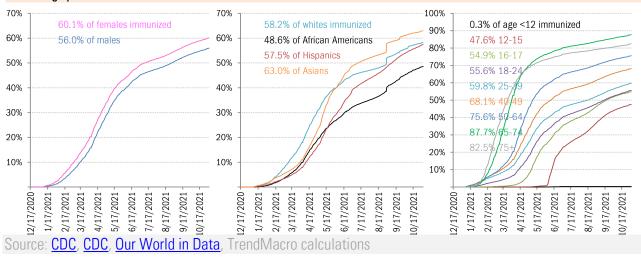
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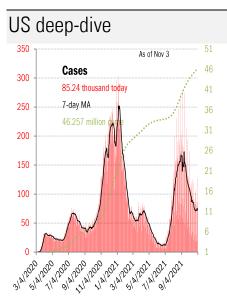


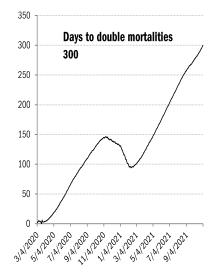
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

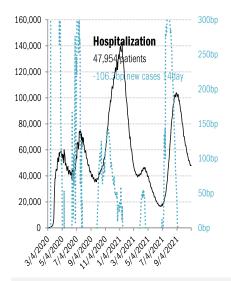
Rolling out the vaccines in the US and the world												
Administered Cumulative							To	day	Immunity	Full	Partial	
Doses 437,130,874			37,130,874					+1.358	million	US	57.0%	66.1%
Boosters			20,947,560					+0.840	million	UK	67.1%	73.4%
One dose			% Рор		Immune		New immune today		France	68.1%	75.9%	
Total population		22	27,943,764	68%		97,938,581	59%	+0.207	million	Spain	79.9%	81.4%
Age 12 to 17		ĺ	14,216,653	60%		11,939,050	50%	+0.020	million	Germany	66.2%	68.9%
Age 18 to 64		157,431,150				36,710,233	67%	+0.154	million	Italy	71.7%	77.3%
Age 65 and over		55,181,338		101%		48,366,409	88%	+0.032 million		Australia	65.6%	74.4%
٦%١						Every Am	erican >18	3 immuniz	ed in	Israel	65.3%	71.0%
4%				46 days					Canada	74.5%	78.5%	
		C+-	ate	by Dec 19, 2021						Japan	73.2%	78.1%
Moderna		30	ale							Africa	6.0%	9.0%
38%		At least part	tial immunity	Midd		71.7% of	5 of population >18 immunized		nized	India	24.2%	53.0%
	58%	as % po	pulation	16.5% previously teste					Brazil	56.4%	74.4%	
		Full immunity		88.1%			vs 60% ac	s 60% adult herd immunity			74.1%	76.2%
AK as % population			pulation	Worst						Global data differ		s, timing
59.6%						WI		As of Nov 3			ME	
52.8%				62.8%							77.1%	
					58.4%					70.8%		
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	69.7%	49.3%	57.1%	53.5%	65.3%	65.9%	58.4%		74.6%	80.0%	77.6%	
	63.7%	44.0%	50.6%	46.1%	60.0%	60.6%	53.6%		66.9%	71.4%	63.0%	
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		-
	68.6%	63.6%	51.2%	62.4%	59.8%	53.9%	56.0%	78.7%	75.4%	80.5%		
	63.0%	53.1%	44.2%	52.8%	55.7%	49.9%	52.0%	60.7%	66.5%	69.8%		-
	CA	UT	CO	NE	MO	KY	WV	VA	MD	CT	RI	
	74.8%	61.4%	67.9%	61.2%	57.0%	57.6%	49.1%	71.4%	72.9%	79.4%	78.5%	
	61.5%	53.8%	61.8%	56.4%	49.9%	50.9%	41.1%	63.3%	66.0%	70.9%	71.1%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		-
		61.4%	72.4%	62.8%	58.2%	54.7%	64.9%	57.8%	75.2%	69.5%		
		53.3%	62.3%	53.4%	48.1%	47.8%	52.8%	50.1%	62.7%	60.1%		
				OK	LA	MS	AL	GA				
	_			59.7%	54.0%	52.3%	54.7%	57.1%				
HI			50.2%	47.8%	45.9%	44.9%	48.4%		-		-	
79.1%				TX					FL	] [	PR	
59.9%			61.6%					69.3%		82.3%		
				53.5%					59.9%	j l	73.7%	
					-			I				-
The demog	raphics of	US vaccinat	tion									

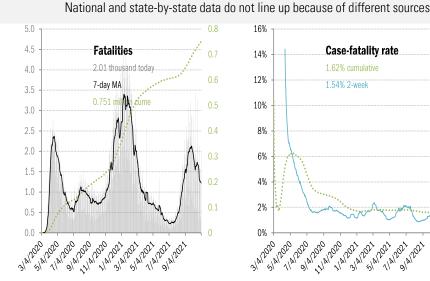
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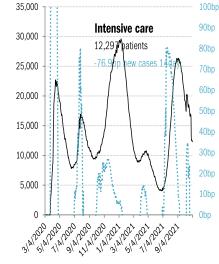


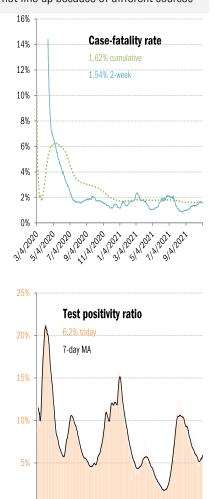


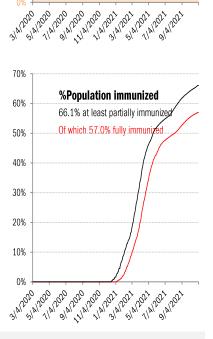




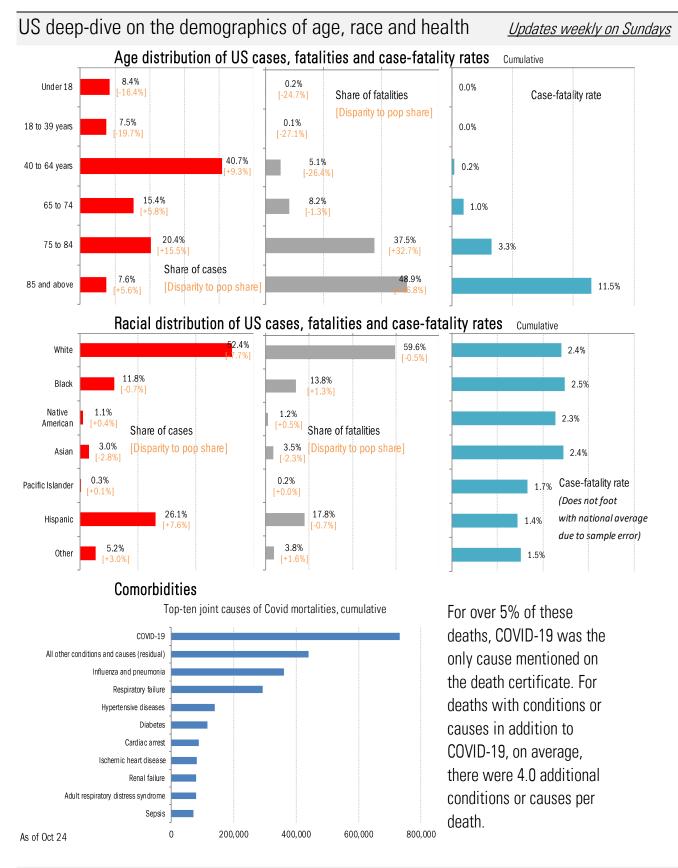








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

#### Recommended reading

#### Did Covid Change How We Dream?

Brooke Jarvis *New York Times* November 3, 2021

#### Illinois remains only midwestern state with covid mask mandate Illinois Review November 3, 2021

## From Boeing to Mercedes, a U.S. worker rebellion

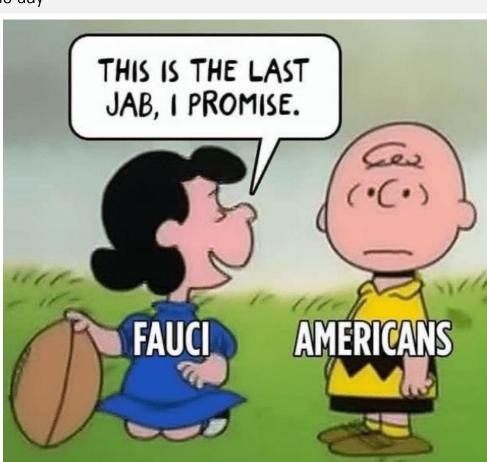
swells over vaccine mandates Tina Bellon and Eric M. Johnson *Reuters* November 2, 2021

## Meme of the day

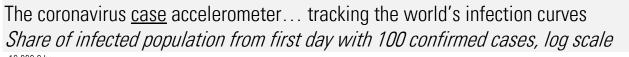
# Over 20 Fauci-Funded Researchers Have Served At the Chinese Communist-Run Wuhan Lab.

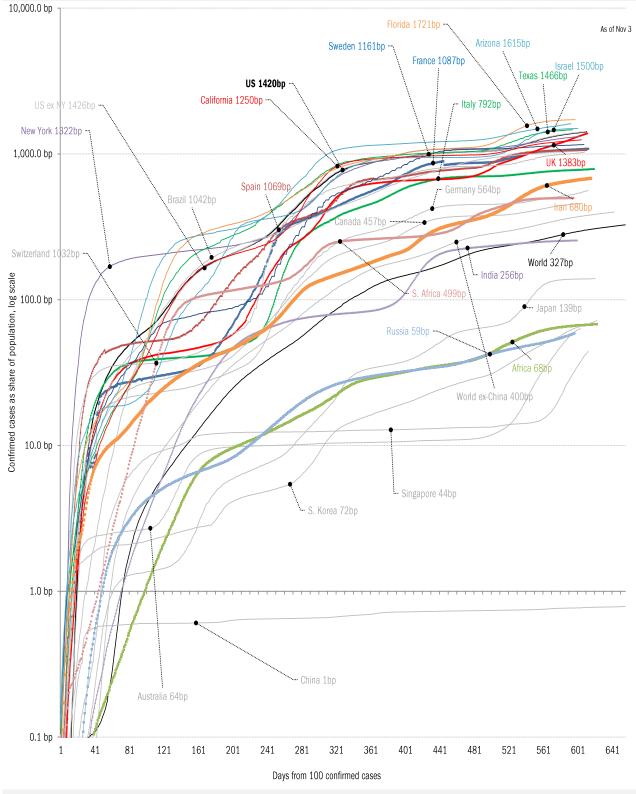
Natalie Winters *National Pulse* November 2, 2021

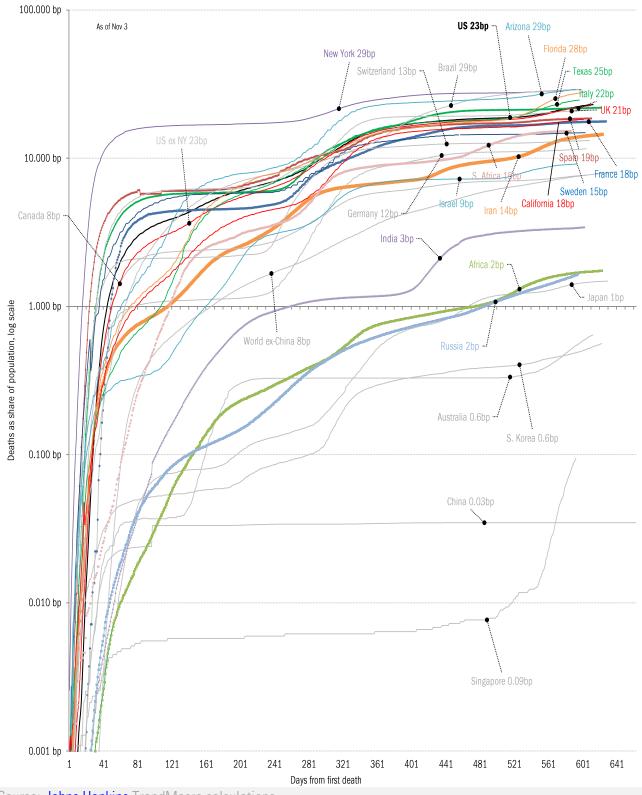
Whistleblower Exposes Pfizer for 'Falsifying Data' in Covid Vaccine Trials Used to Justify Mandates Kyle Becker *Becker News* November 2, 2021



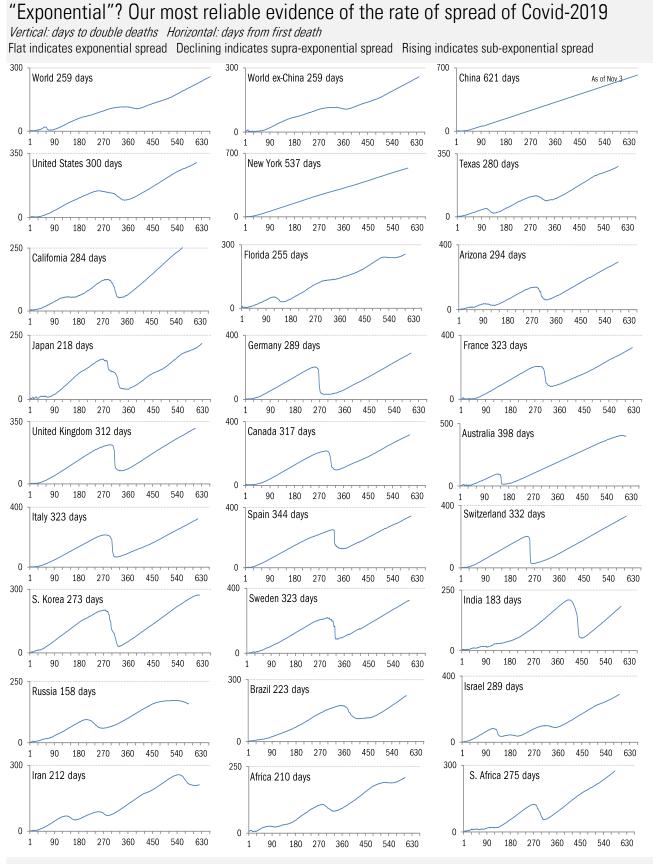
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP



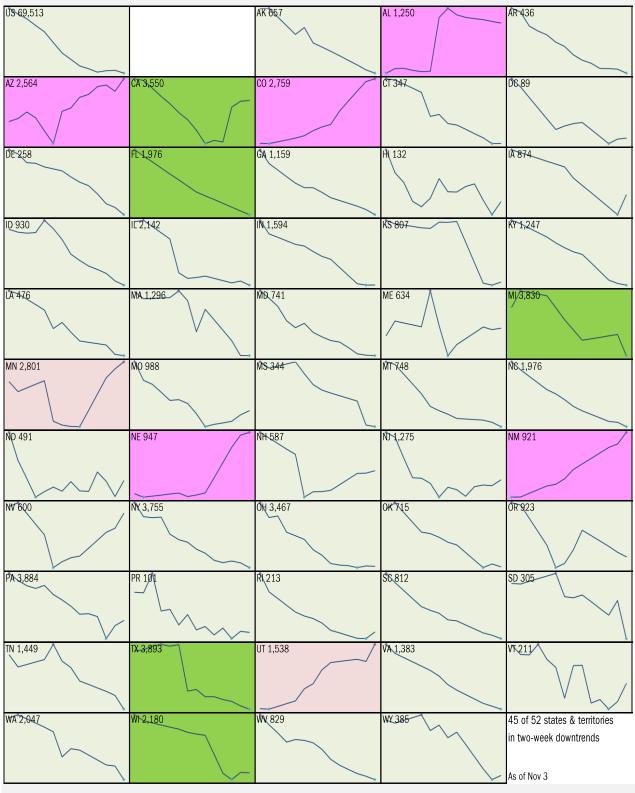




## The coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale*

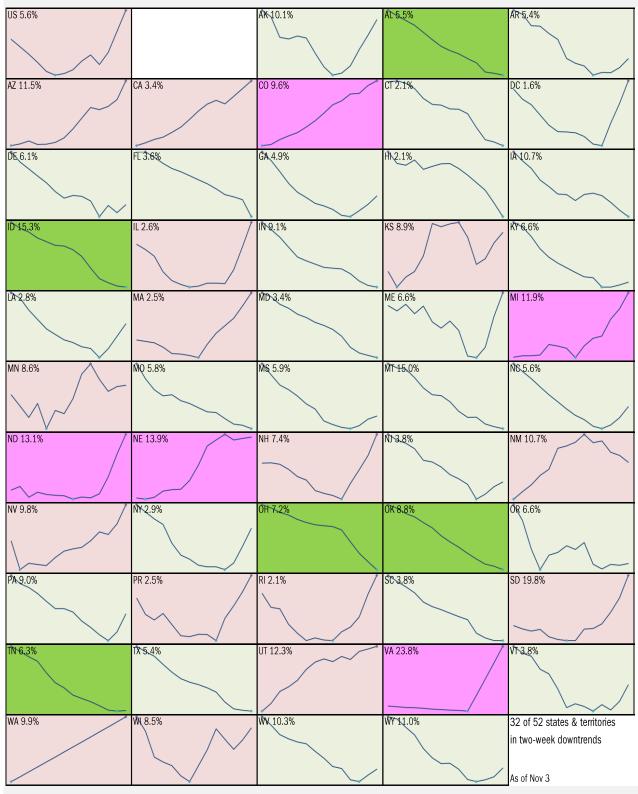


Requirement to <u>Open Up America Again</u>: 14-day "downward trajectory" in new cases *14-day moving average, last 14 days Most recent value displayed* • High • Low Downward trajectory Five best Upward trajectory Five worst



Source: Johns Hopkins, TrendMacro calculations

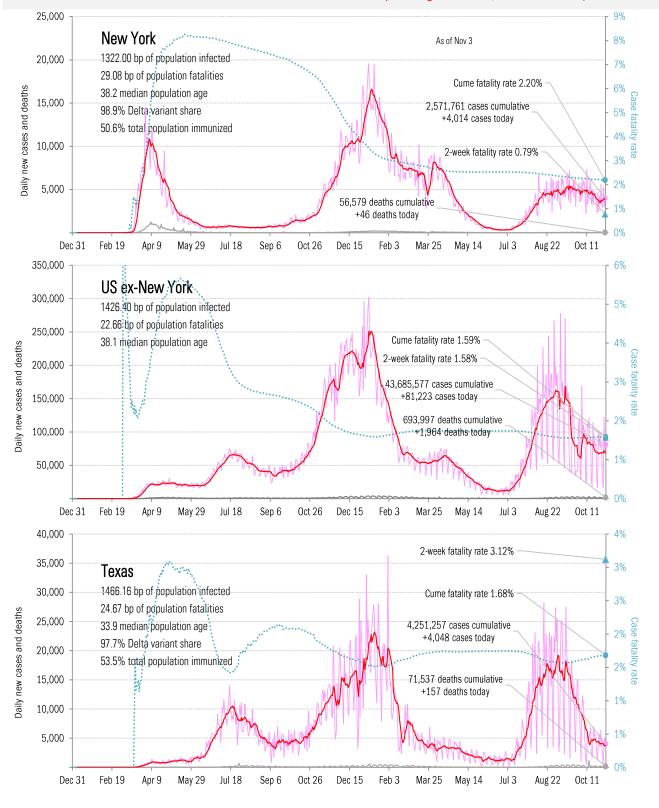
Alt requirement to <u>Open Up America Again</u>: 14-day "downward trajectory" in pos tests *14-day moving average, last 14 days Most recent value displayed* • High • Low Downward trajectory Five best Upward trajectory Five worst



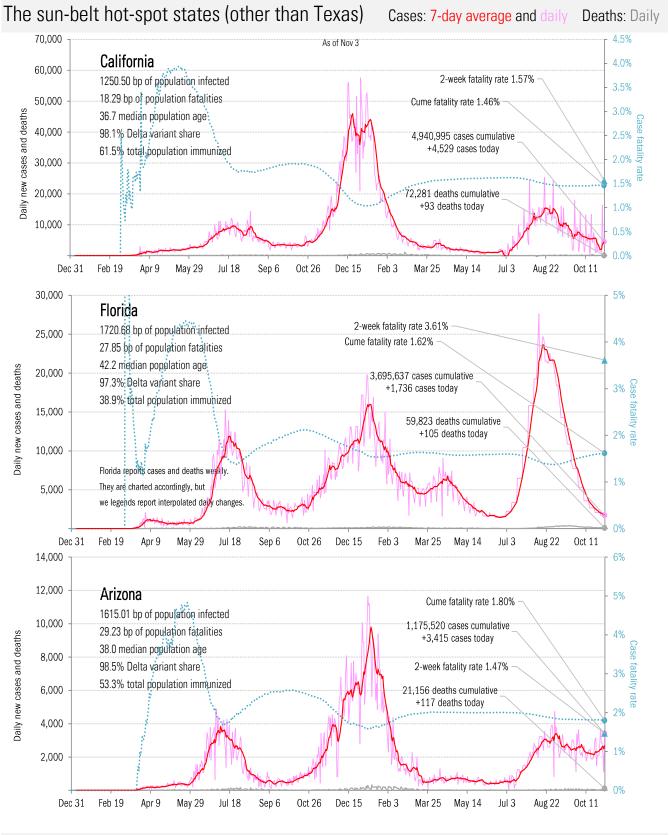
Source: Covid Act Now, TrendMacro calculations

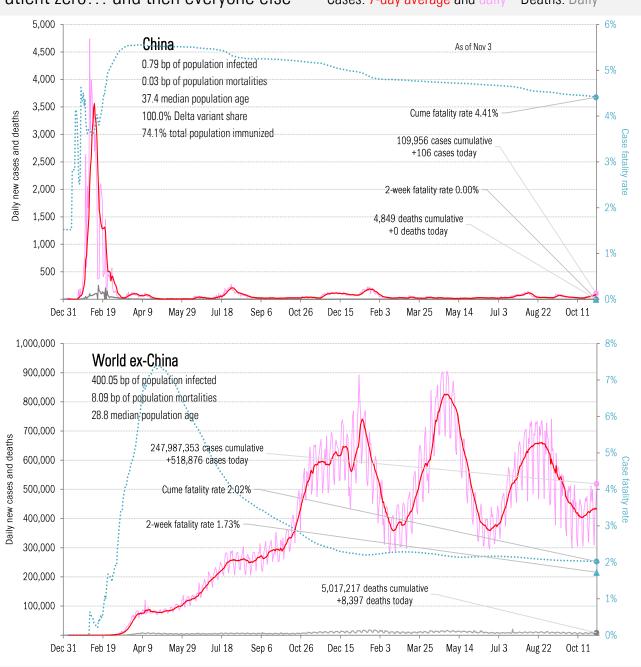
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations



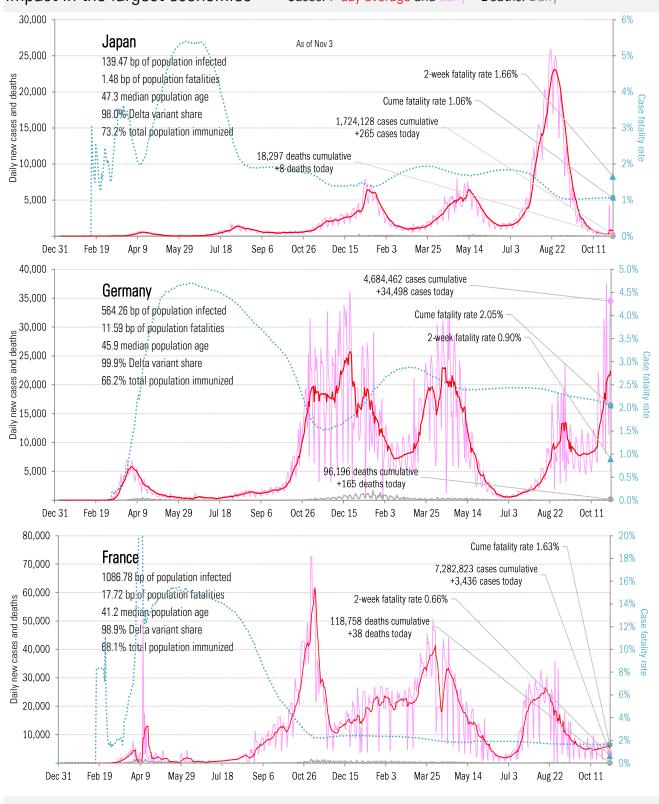


## Patient zero... and then everyone else

Cases: 7-day average and daily Deaths: Daily

Source: Johns Hopkins, TrendMacro calculations

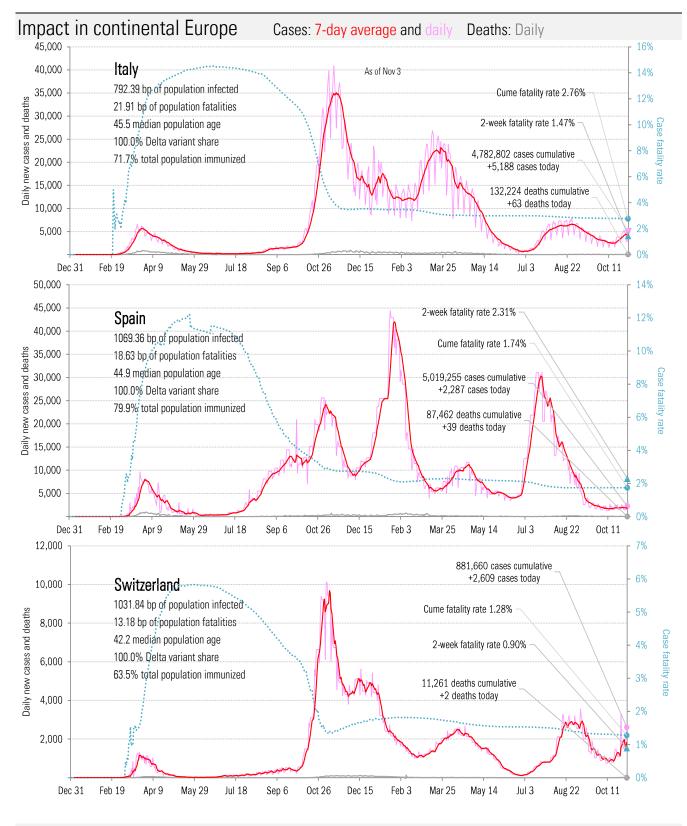
Impact in the largest economies Cases: 7-day average and daily Deaths: Daily

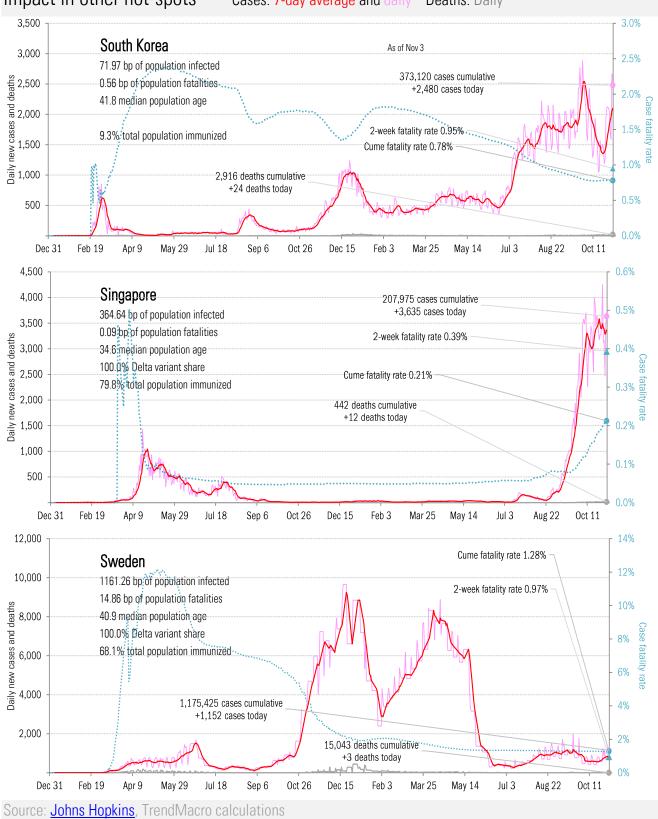


Source: Johns Hopkins, TrendMacro calculations

80,000 18% United Kingdom 16% As of Nov 3 70,000 1382.76 bp of population infected strap pure set 60,000 50,000 \$80 Met 20,000 30,000 14% 21.25 bp of population fatalities 9,215,683 cases cumulative 12% 40.5 median population age +41,530 cases today 100.0% Delta variant share 10% fatality Cume fatality rate 1.54% 67.1% total population immunized 8% rate 2-week fatality rate 0.37% 6% Alia 20,000 141,607 deaths cumulative 4% +217 deaths today 10,000 2% 0% Dec 15 Dec 31 Feb 19 Apr 9 May 29 Jul 18 Sep 6 Oct 26 Feb 3 Mar 25 May 14 Jul 3 Aug 22 Oct 11 12,000 9.0% 1,730,818 cases cumulative Canada 8.0% +2,275 cases today 10,000 456.74 bp of population infected 7.0% 7.69 bp of population fatalities Daily new cases and deaths Cume fatality rate 1.68% 8,000 6.0% 40.8 median population age 100.0% Delta variant share 5.0% 2-week fatality rate 1.07% 6,000 74.5% total population immunized 4.0% 4,000 3.0% 2.0% 2,000 29,149 deaths cumulative 1.0% +39 deaths today 0.0% May 29 Dec 31 Feb 19 Apr 9 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% 175,813 cases cumulative 2,500 63:55 bp of population infected +1,537 cases today 3.5% 0.64 bp of population fatalities Daily new cases and deaths 2,000 379 median population age 100.0% Delta variant share 2.5% 1,500 65.6% total population immunized 2.0% Cume fatality rate 1.01% 1,000 1.5% 2-week fatality rate 0.60% 1.0% 500 1,781 deaths cumulative 0.5% +13 deaths today 0.0% Apr 9 Jul 3 Aug 22 Dec 31 Feb 19 May 29 Jul 18 Sep 6 Oct 26 Dec 15 Feb 3 Mar 25 May 14 Oct 11

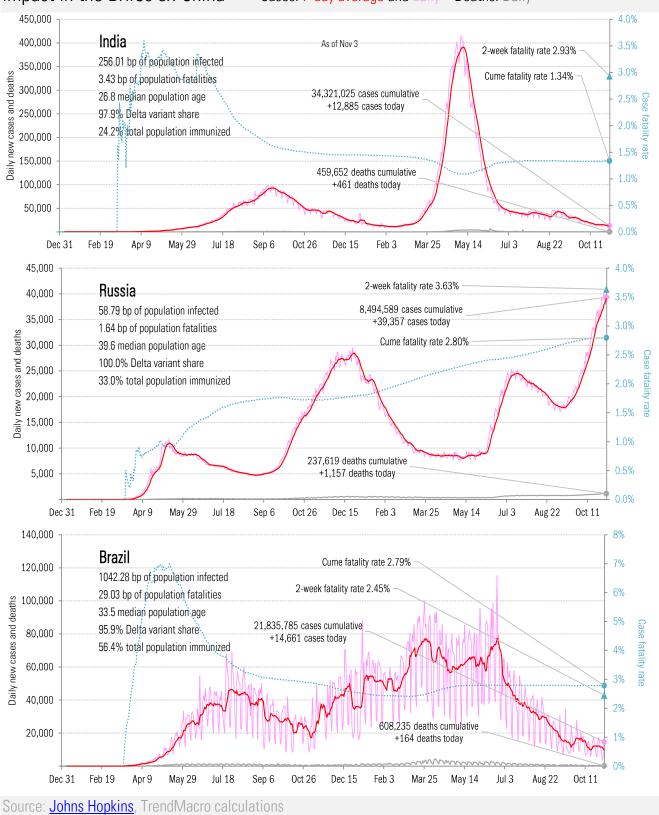






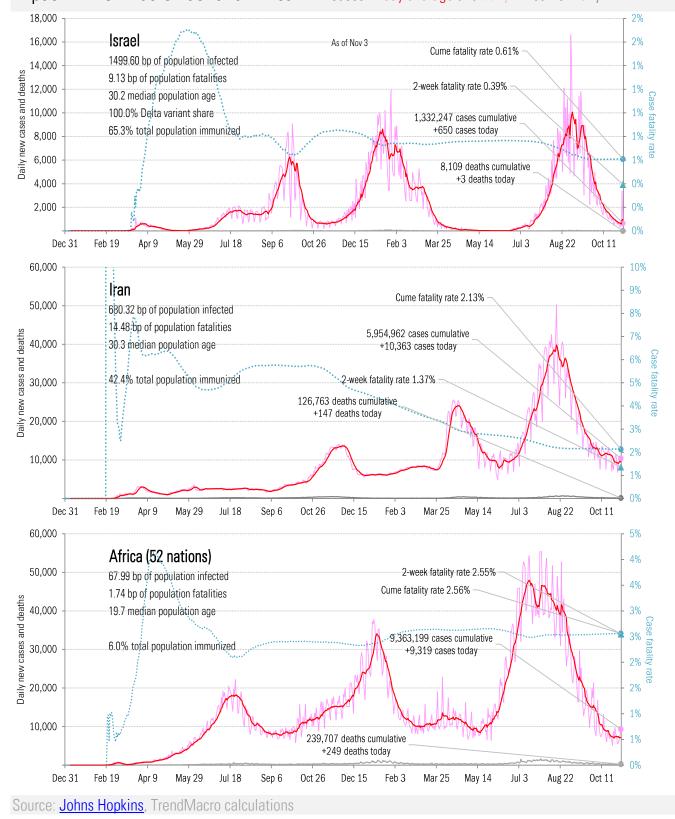
#### Impact in other hot-spots Cases: 7-day average and daily Deaths: Daily

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

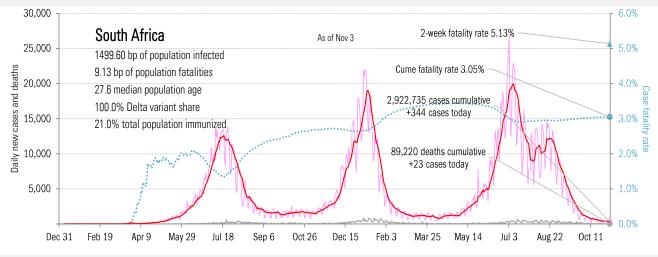


Impact in the Middle East and Africa

Cases: 7-day average and daily Deaths: Daily







Source: Johns Hopkins, TrendMacro calculations