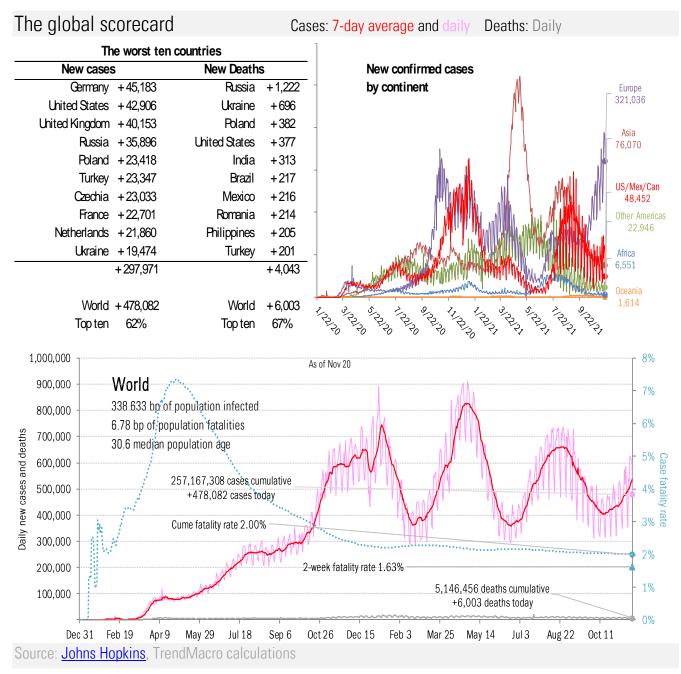


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

### Data Insights: Covid-2019 Monitor

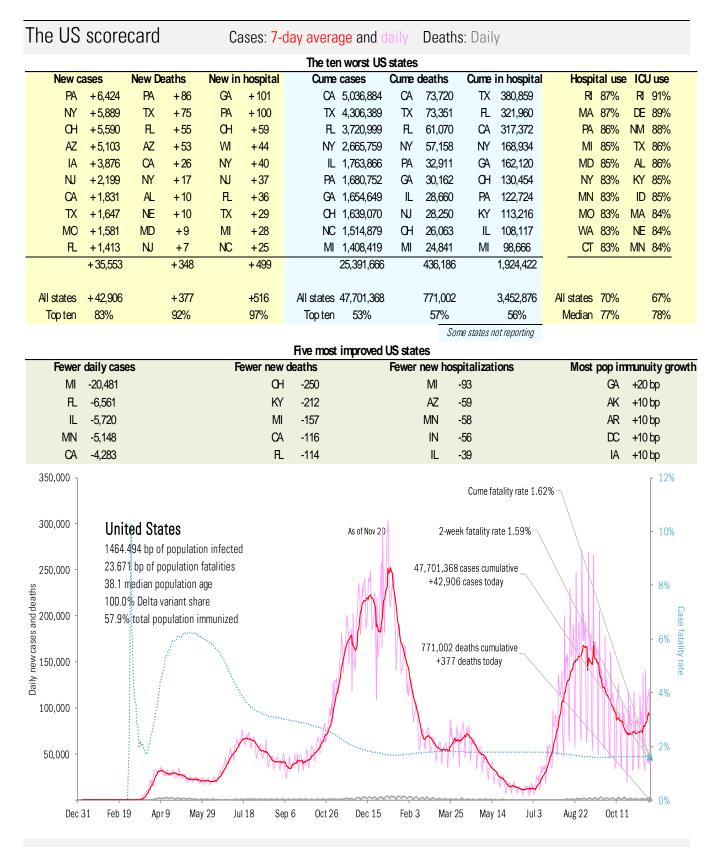
Sunday, November 21, 2021



#### For more information contact us:

Donald Luskin: 214 550 2121 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 <u>tdemas@trendmacro.com</u>

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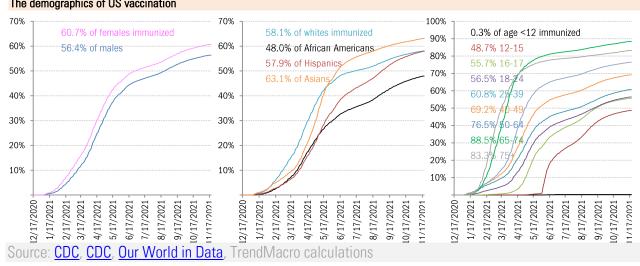


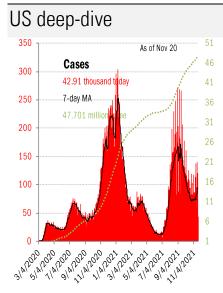
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

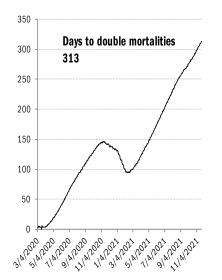
Rolling out the vaccines in Administered Cumulative							To	day	Immunity	Full	Partia
Doses		62,325,638						million	US	57.9%	68.3
Boosters	35,099,972							million	UK	67.6%	74.4
	One dose		% Pop Imr		nune	% pop New immune toda		une today	France	69.0%	76.4
Total population	235,630,473		71% 2		01,187,366	60%	+0.212 million		Spain	80.3%	81.7
Age 12 to 17	14,538,452		61%		12,193,917	51%	+0.014	million	Germany	67.3%	69.8
Age 18 to 64	160,913,390		79%		39,140,215	68%	+0.158 million		Italy	73.0%	77.8
Age 65 and over	56,526,477		100%		48,910,488			million	Australia	71.0%	76.7
1%1					Every Am	erican >18	3 immuniz	ed in	Israel	62.0%	67.4
4%				133 days					Canada	75.7%	79.29
	Sta	ato	Bost	BAST					Japan	76.2%	78.9
Moderna	36	ale	Dest		by Apr 1,	2022	_		Africa	6.9%	10.19
38% Pfizer 58% At least partial immun as % population		ial immunity	Middle 17.0% previou			population >18 immunized		India	28.6%	54.99	
							ly tested positive		Brazil	60.0%	75.99
Full immunity		Worst 89.8% vs 60			vs 60% ad	lult herd in	munity	China	74.5%	84.8	
AK	as % po	pulation	vvors	st	WI	-			Global data diffe		s, timing
61.9%							As of Nov 20			ME	
53.9%										80.6%	
					59.2%					71.9%	
WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
71.8%	50.3%	59.0%	57.0%	67.9%	66.7%	60.3%		76.9%	83.4%	84.0%	
64.6%	44.9%	51.6%	48.4%	62.1%	61.0%	54.3%		68.0%	72.4%	64.0%	
OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		
70.5%	65.4%	52.9%	65.2%	61.8%	55.1%	57.6%	83.6%	78.0%	84.1%		
63.7%	54.0%	45.2%	54.1%	56.4%	50.4%	52.7%	62.0%	67.4%	70.7%	D	
CA	UT	CO	NE	MO	KY	WV	VA	MD	СТ	RI	
77.6%	63.6%	70.3%	63.2%	58.9%	59.5%	53.8%	74.3%	74.5%	82.5%	81.8%	
62.6%	55.2%	62.7%	57.1%	50.6%	51.7%	41.5%	64.4%	67.0%	71.6%	72.0%	
	AZ	NM	KS	AR	TN	NC	SC	DC	DE		
	63.3%	75.3%	65.1%	59.9%	56.2%	68.5%	59.5%	79.3%	71.3%		
L	54.2%	63.2%	54.2%	49.0%	49.2%	53.8%	51.0%	63.9%	60.9%		
			OK	LA	MS	AL	GA				
н			61.8%	55.0%	53.4%	55.9%	58.4%				
			51.2%	48.5%	46.8%	45.7%	49.3%		r r	חח	
81.2%			TX					FL 71.0%		PR	
60.6%			63.3% 54.3%					71.0% 60.8%		84.3% 74.4%	

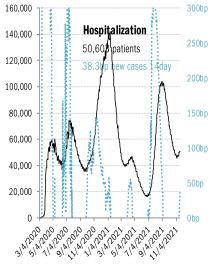
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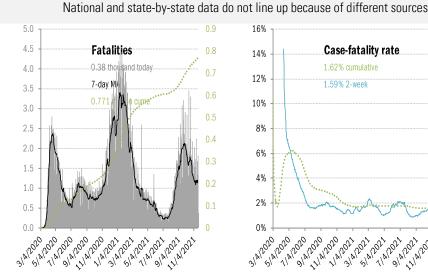
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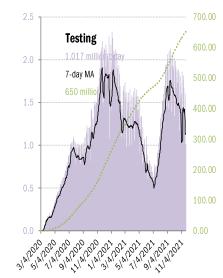


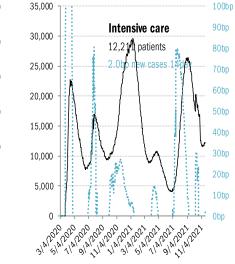


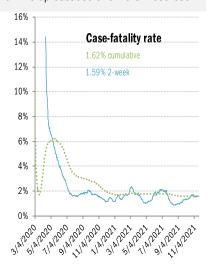


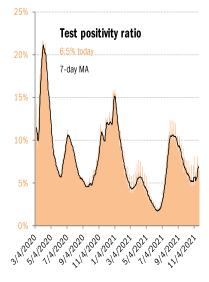


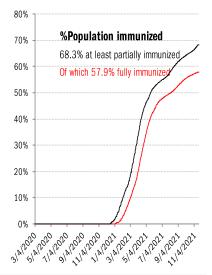




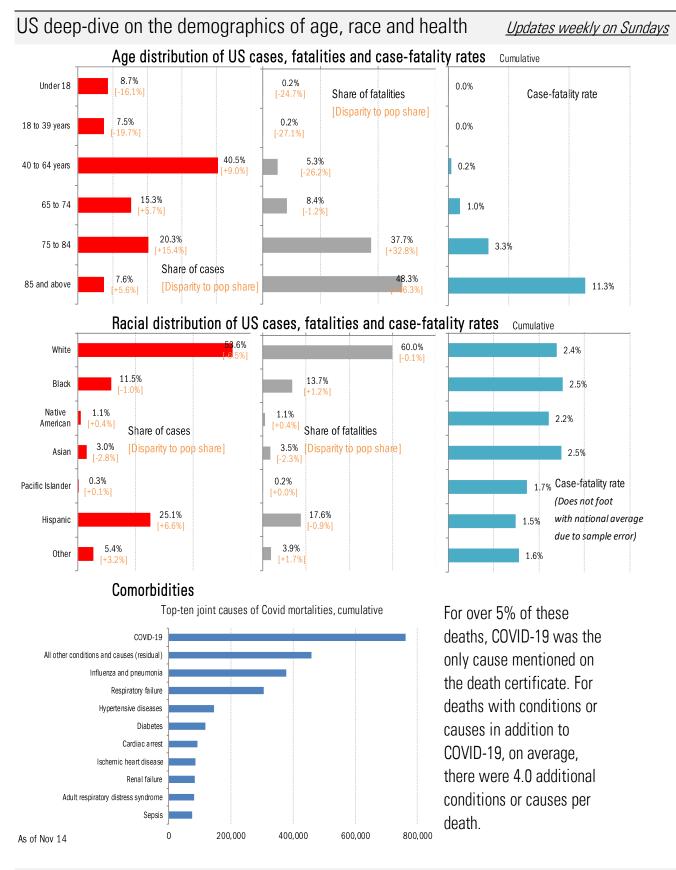








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



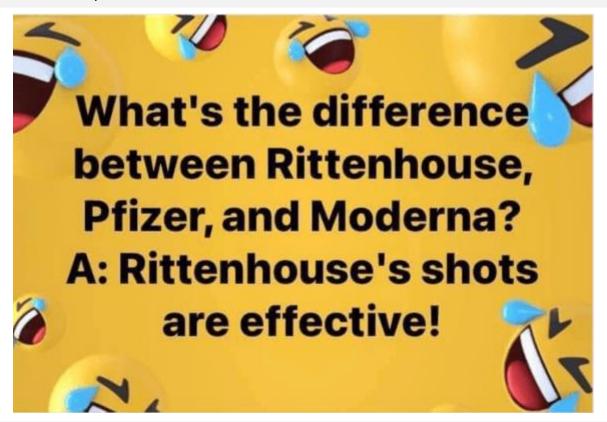
Source: Distributions <u>CDC</u>, Comorbidities <u>CDC</u>, TrendMacro calculations

## Recommended reading

#### I'm 87, Triple Vaxxed and Living My Life Again

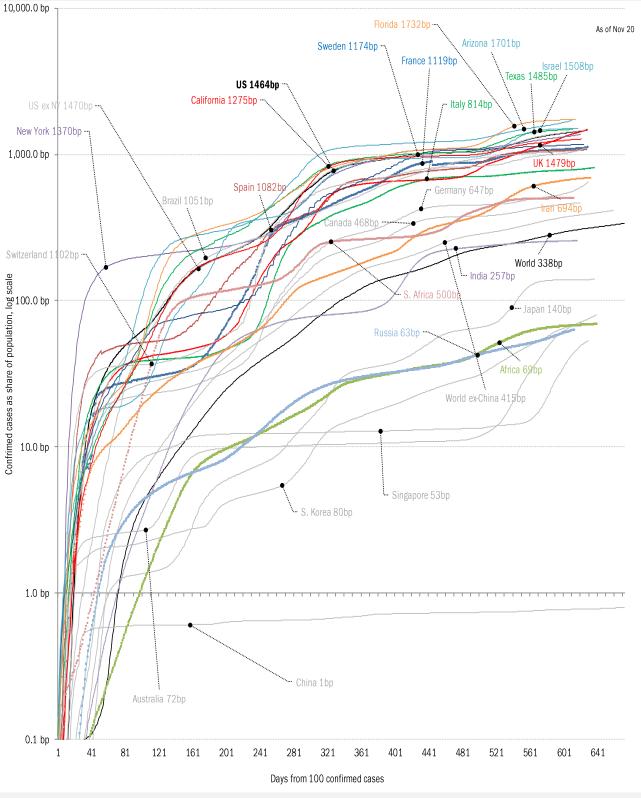
Katharine Esty *New York Times* November 21, 2021 <u>Thousands in Austria Protest Virus Lockdown and</u> <u>Vaccine Mandate</u> Melissa Eddy *New York Times* November 20, 2021

## Meme of the day

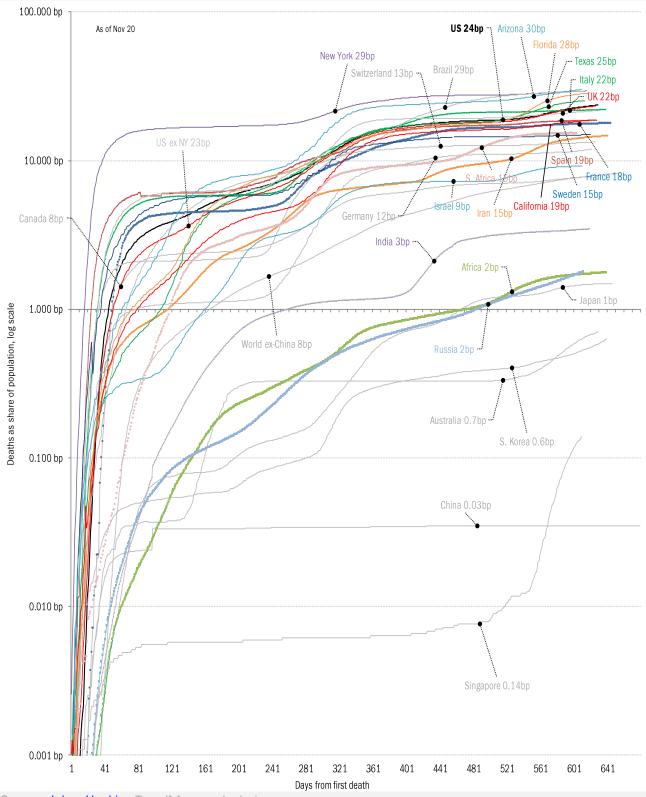


Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

## 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*

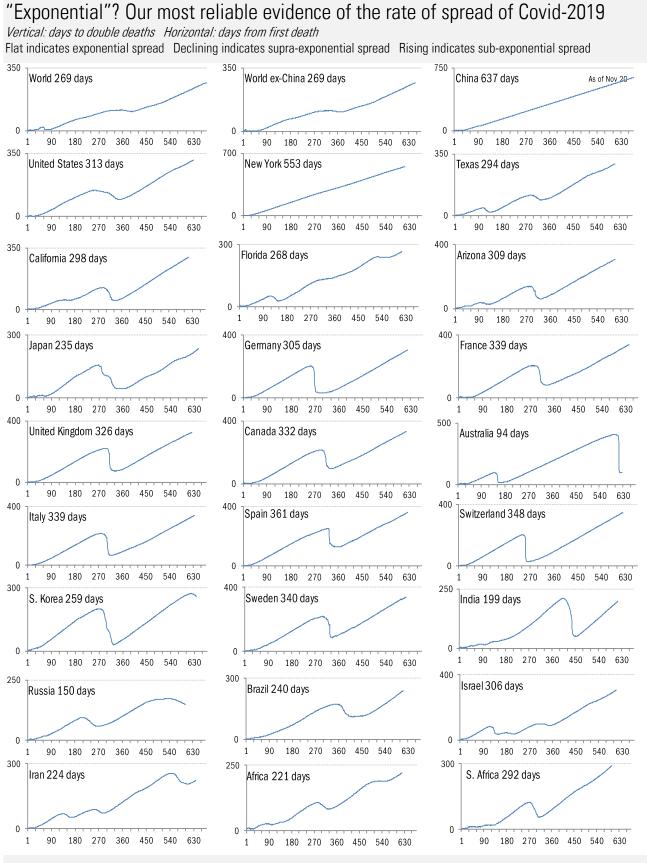


Source: Johns Hopkins, TrendMacro calculations



# 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



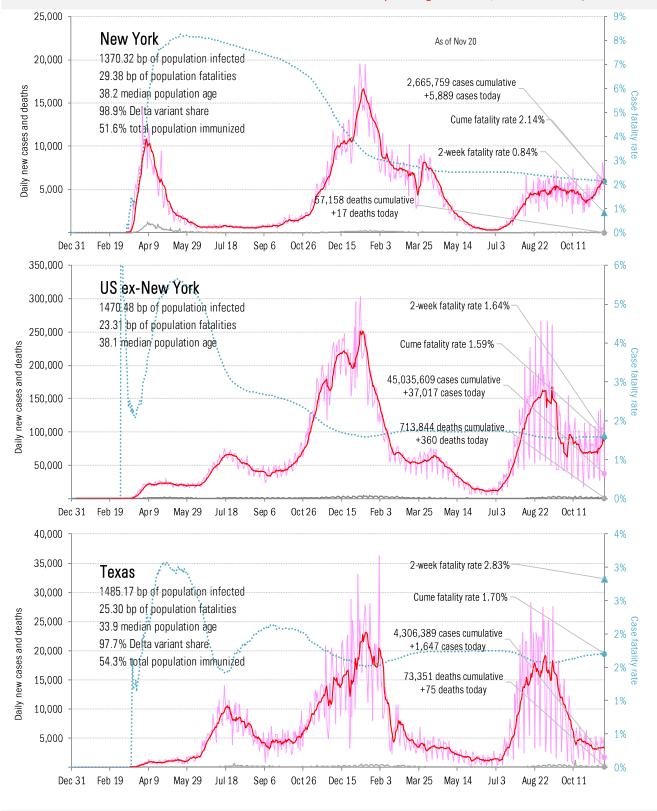
Alt requirement to <u>Open Up America Again</u>: 14-day "downward trajectory" in pos tests *14-day moving average, last 14 days Most recent value displayed* • High • Low Downward trajectory Five best Upward trajectory Five worst



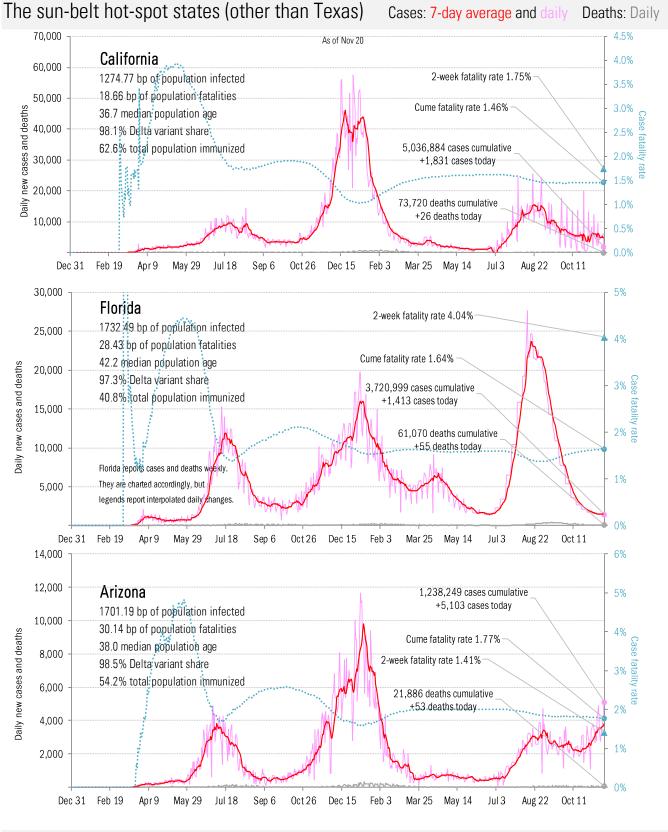
Source: <u>Covid Act Now</u>, TrendMacro calculations

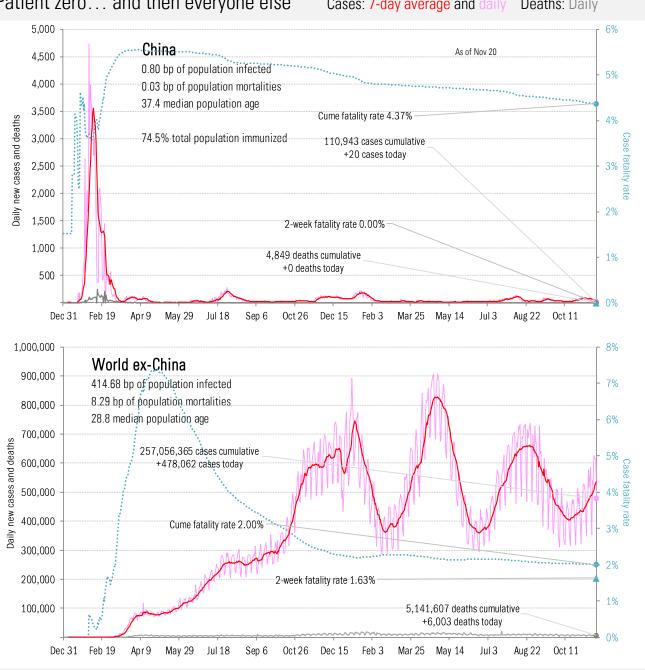
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations



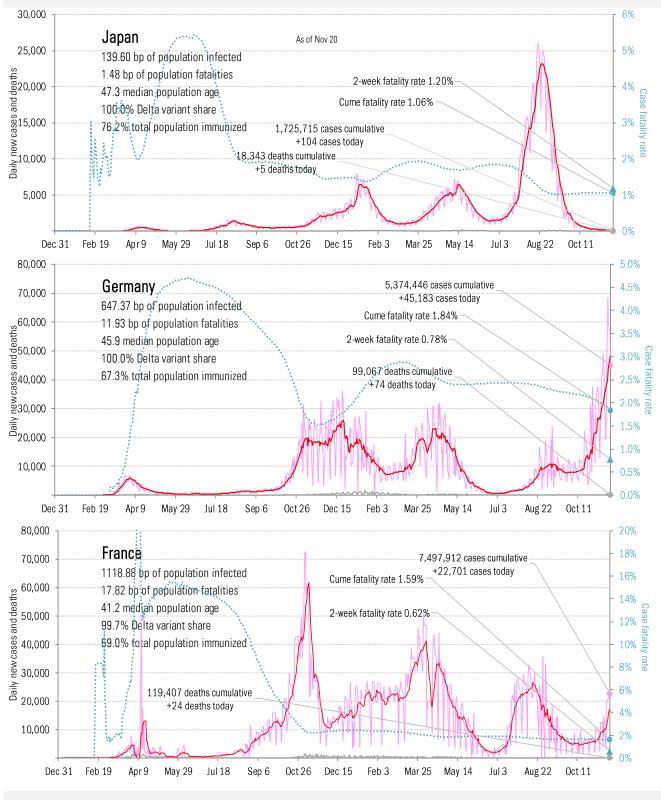


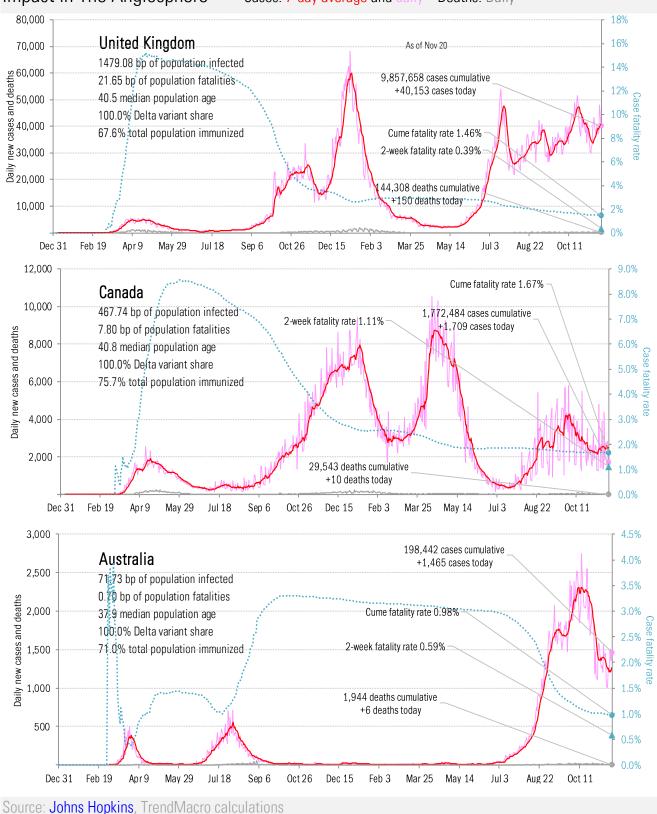
Patient zero... and then everyone else

Cases: 7-day average and daily Deaths: Daily

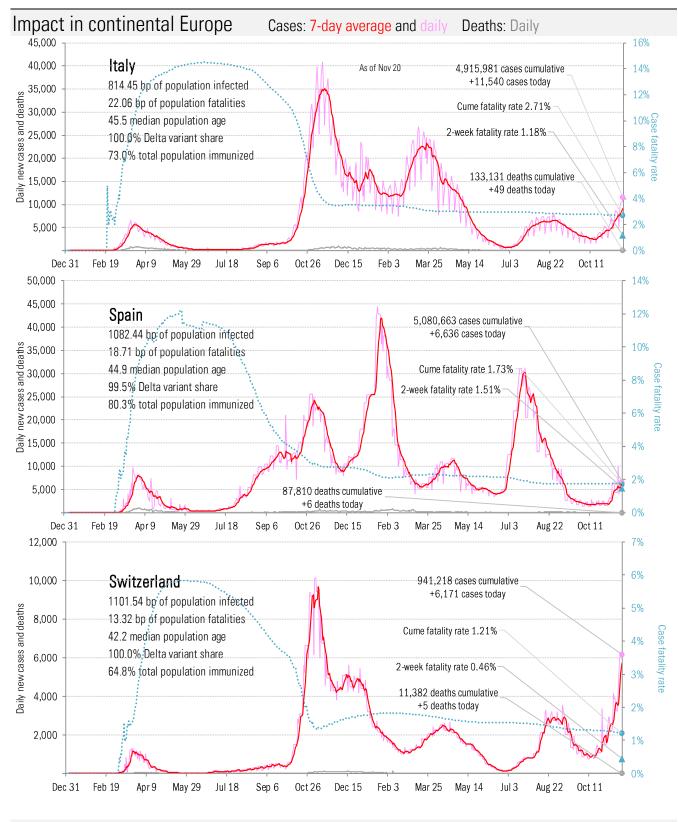
Source: Johns Hopkins, TrendMacro calculations

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

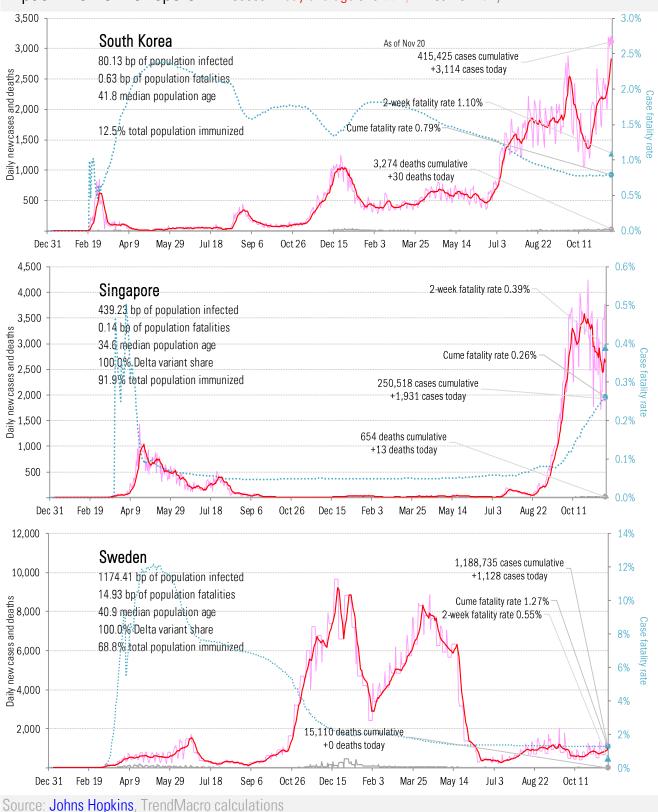




## Impact in The Anglosphere Cases: 7-day average and daily Deaths: Daily

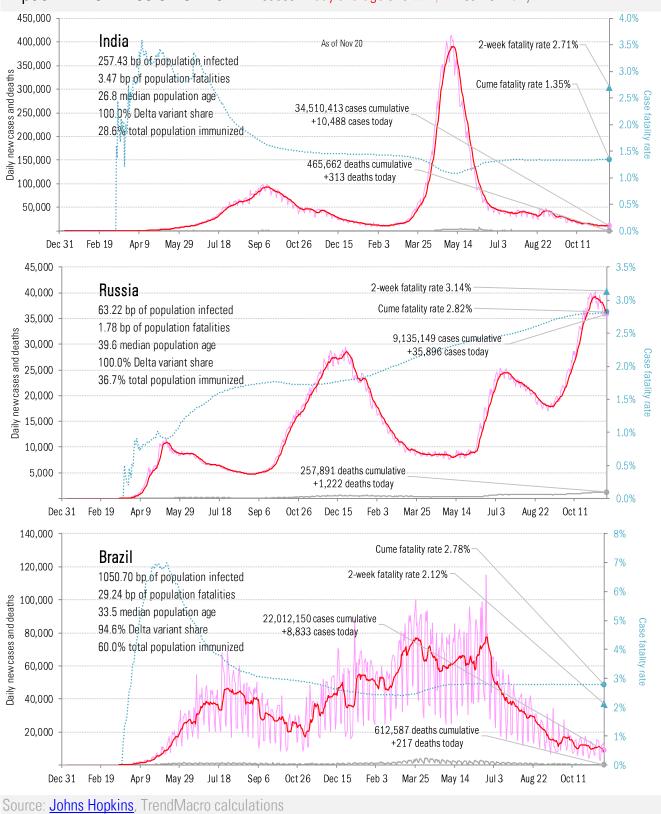


Source: Johns Hopkins, TrendMacro calculations



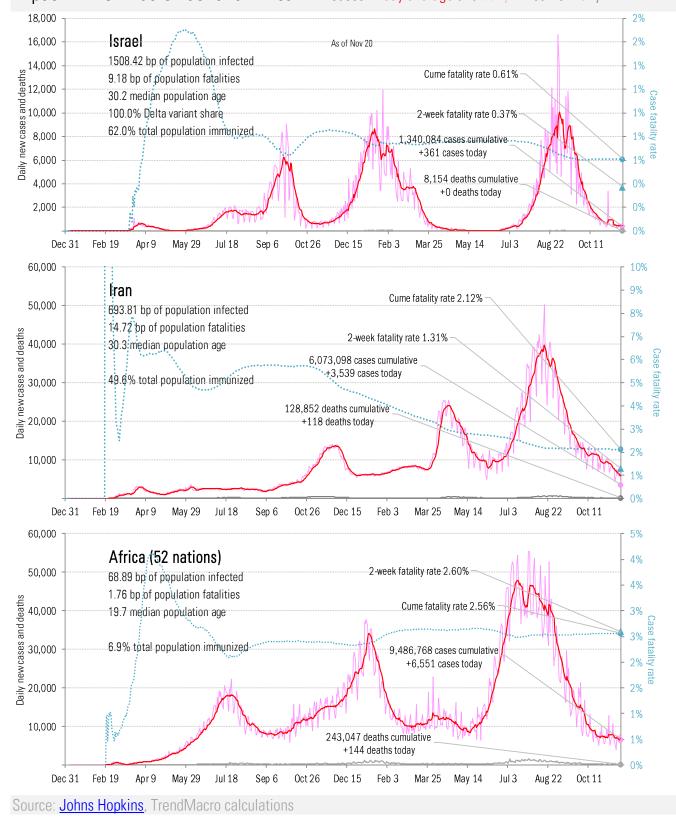
Impact in other hot-spots Cases: 7-day average and daily Deaths: Daily

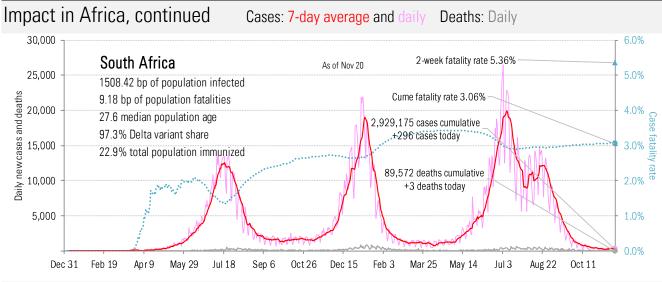
Impact in the BRICs ex-China Cases: 7-day average and daily Deaths: Daily



Impact in the Middle East and Africa

Cases: 7-day average and daily Deaths: Daily





Source: Johns Hopkins, TrendMacro calculations