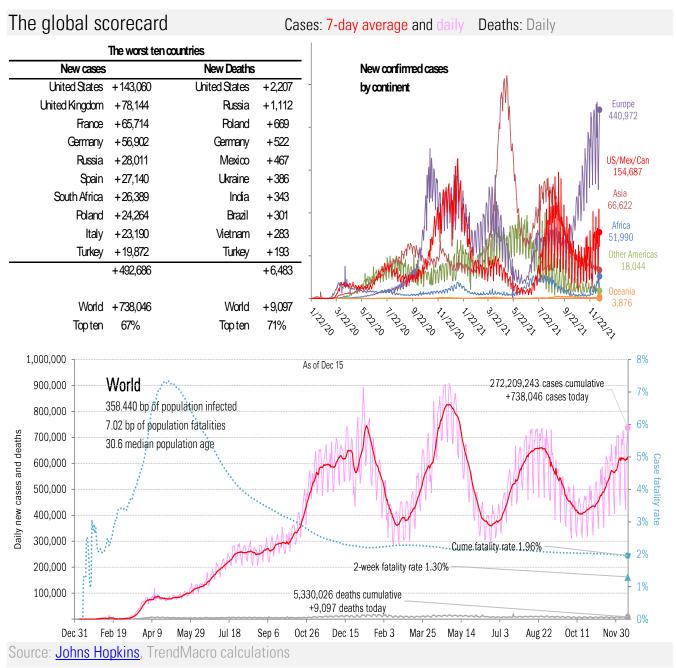


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

### Data Insights: Covid-2019 Monitor

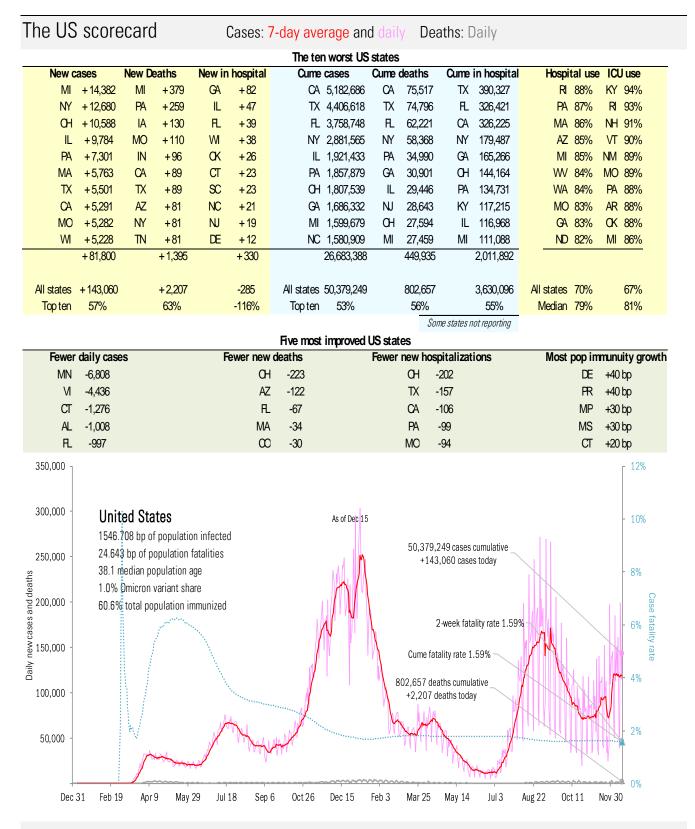
Thursday, December 16, 2021



### For more information contact us:

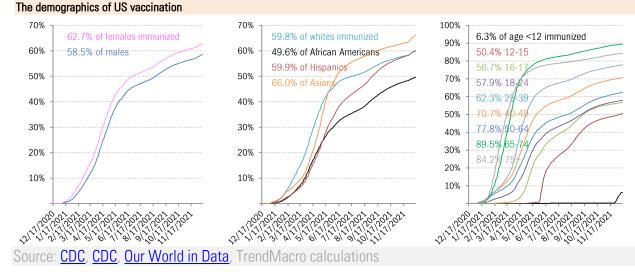
Donald Luskin: 214 550 2121 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 <u>tdemas@trendmacro.com</u>

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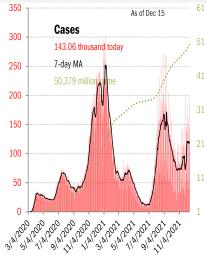


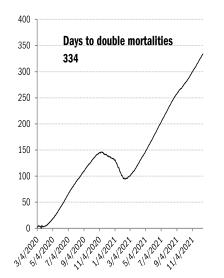
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

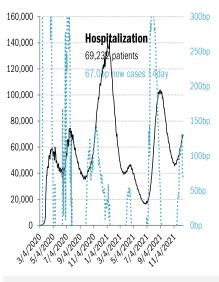
Rolling out the vaccines in the US and the world												
Administered Cumulative								day	Immunity	Full	Partial	
Doses	s 501,271,466						+1.751	million	US	60.6%	72.3%	
Boosters		ļ	56,981,143					+0.973	million	UK	68.7%	75.3%
		One dose				nune % pop		New immune today		France	71.4%	77.5%
Total population		245,906,238				07,963,551	62%	+0.348	million	Spain	80.8%	82.5%
-	Age 12 to 17		14,939,304		63% 82% 14		53%	+0.020 million		Germany	69.3%	72.3%
	Age 18 to 64		166,446,092		1	42,045,558	70%	+0.136	million	ltaly	73.5%	79.0%
Age 65 and over		!	57,859,347		100%				million	Australia	75.3%	78.6%
1&I						Every Am	erican >18	3 immuniz	ed in	Israel	62.5%	69.2%
4%				_		62 days			Canada	76.8%	82.2%	
		C+	ate	Best						Japan	77.9%	79.4%
Moderna		30	ale	Dest		by Feb 14	1, 2022			Africa	8.3%	12.8%
38%	Pfizer	At least par	tial immunity	Midd		74.0% of population >18 immunized 17.7% previously tested positive			India	38.0%	59.0%	
	58%	as % po	opulation	IVIIUU	18				e	Brazil	65.8%	77.2%
		Full immunity		Worst		91.7% vs 60% adult herd im			imunity	China	80.5%	84.8%
AK		as % po	opulation	vvors	ST					Global data differ	rs due to source	s, timing
64.2%						WI	As of Dec 15				ME	
55.7%						67.1%					84.1%	
					61.1%					74.7%		
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	1
	74.3%	51.6%	61.1%	61.2%	70.4%	71.1%	62.4%		81.4%	87.6%	93.5%	
	66.9%	45.8%	53.1%	51.8%	64.5%	63.5%	56.0%		70.7%	75.8%	66.2%	
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		-
	72.9%	68.0%	54.9%	69.3%	63.9%	56.9%	59.6%	84.3%	81.5%	88.3%		
	65.6%	55.7%	46.7%	56.1%	58.2%	51.5%	54.5%	60.5%	69.5%	73.5%		_
	CA	UT	CO	NE	MO	KY	WV	VA	MD	CT	RI	
	80.9%	66.2%	73.2%	65.4%	61.3%	61.5%	89.4%	77.4%	78.7%	86.6%	86.2%	
	65.0%	57.4%	65.2%	59.0%	52.3%	53.5%	71.4%	67.0%	69.5%	73.9%	75.2%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		-
		66.0%	78.9%	67.9%	61.7%	57.9%	73.4%	61.6%	85.2%	75.2%		
		56.1%	65.3%	56.1%	50.4%	50.5%	55.7%	52.4%	66.4%	63.2%		
				OK	LA	MS	AL	GA				
				64.6%	56.6%	55.0%	57.7%	60.2%				
HI 83.7% 62.6%				52.7%	49.7%	47.8%	47.0%	50.2%				_
				TX					FL		PR	
				65.5%							87.0%	
				56.1%					62.6%		75.6%	
												-
The demog	raphics of	US vaccinat	tion									

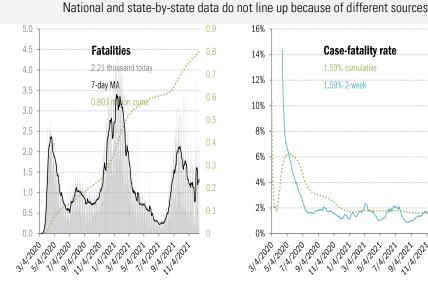




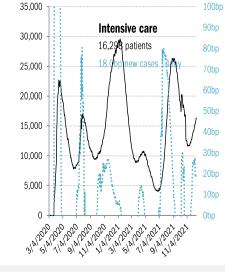


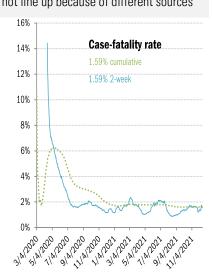


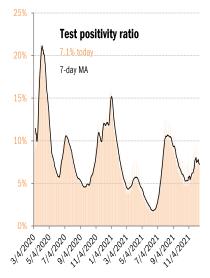


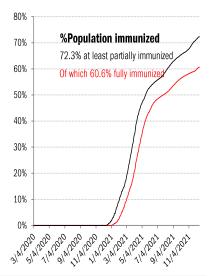




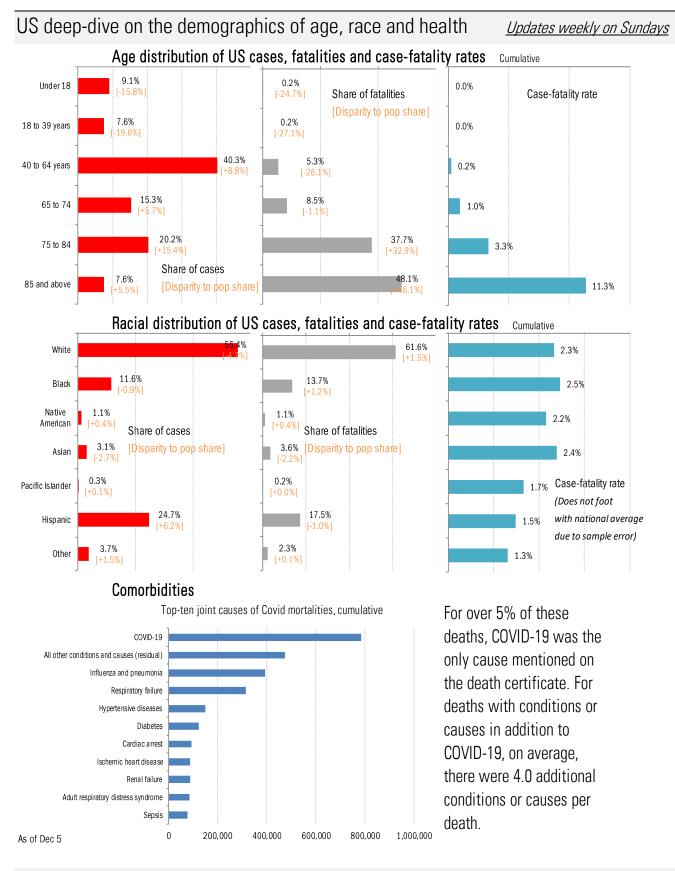








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

# Recommended reading

Andrew Cuomo ordered to return \$5.1M pandemic book profits to state

Carl Campanile and Bernadette Hogan *New York Post* December 14, 2021

#### New Fauci-Zuckerberg Emails Reveal Offer of 'Data Reports' To Aid Lockdown Policies, Vaccine Development. Natalie Winters and Raheem J. Kassam National Pulse

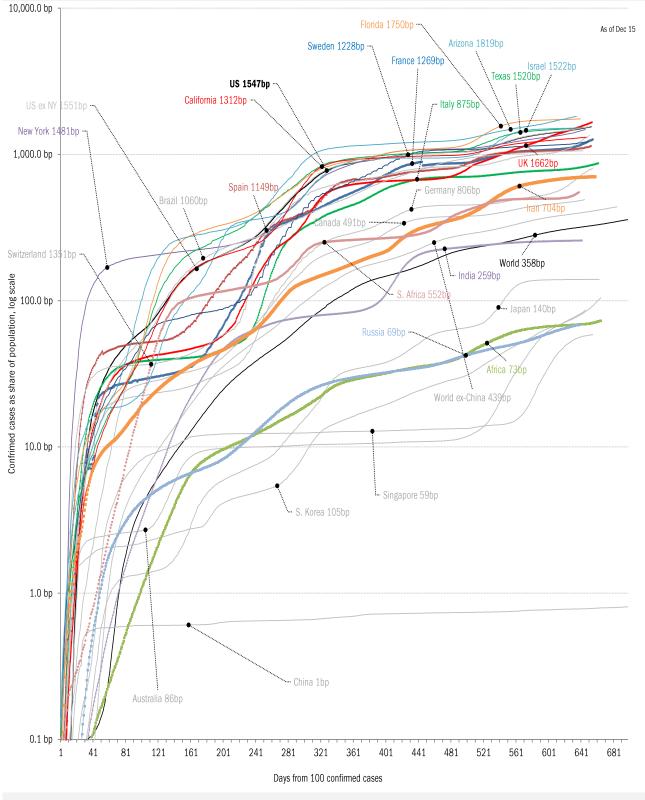
December 14, 2021

Meme of the day

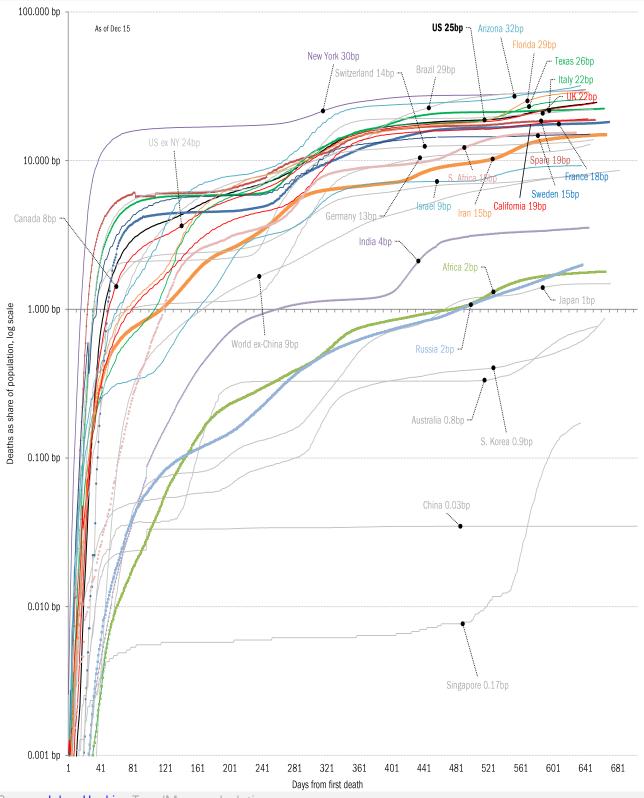


Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

# 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*

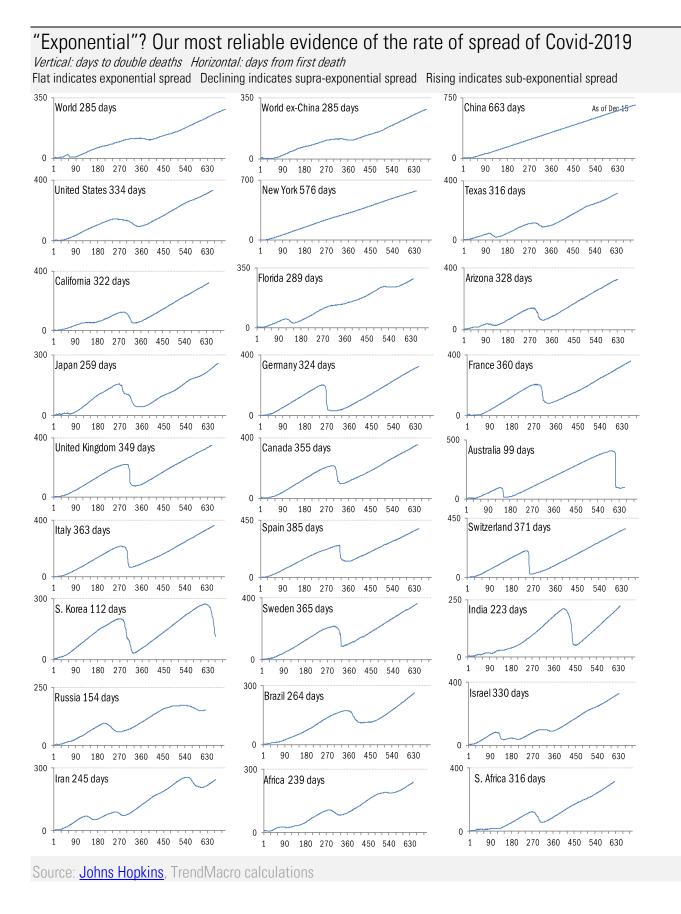


Source: Johns Hopkins, TrendMacro calculations



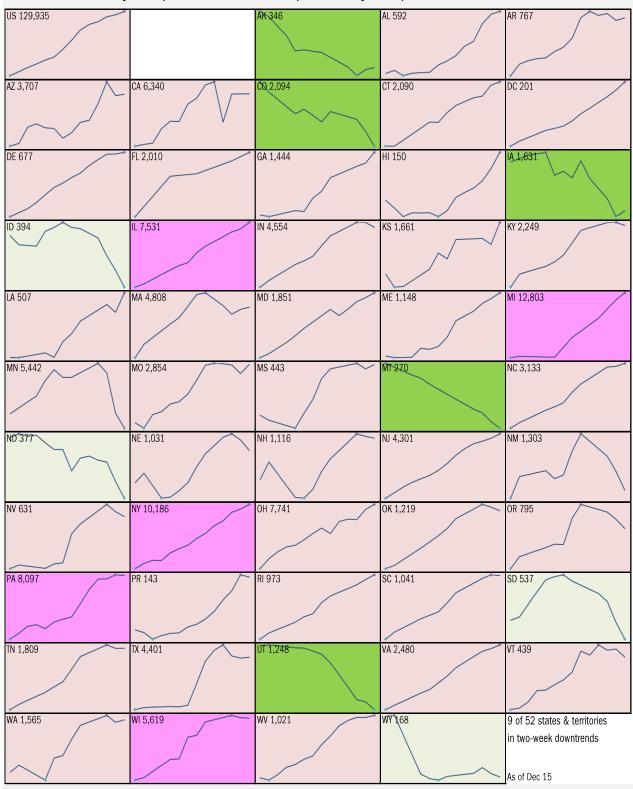
The coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale* 

Source: Johns Hopkins, TrendMacro calculations



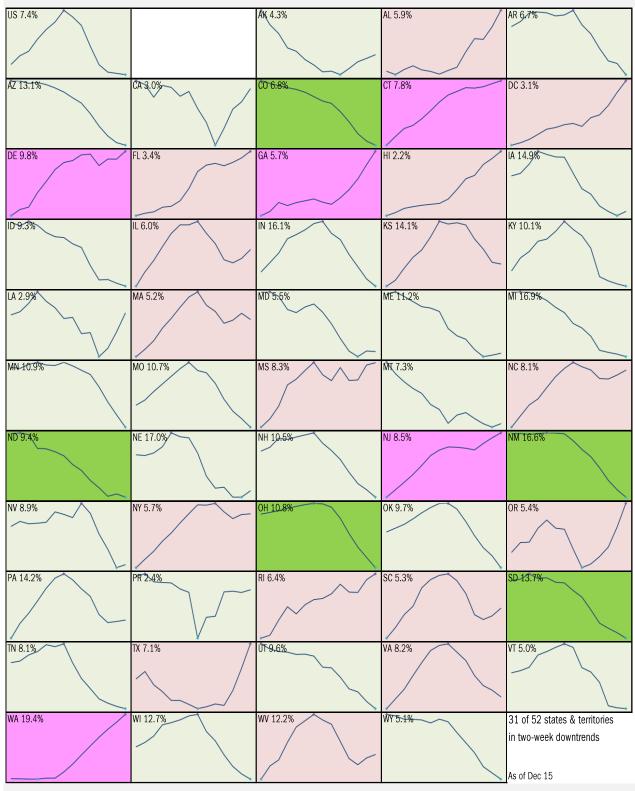
#### 

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

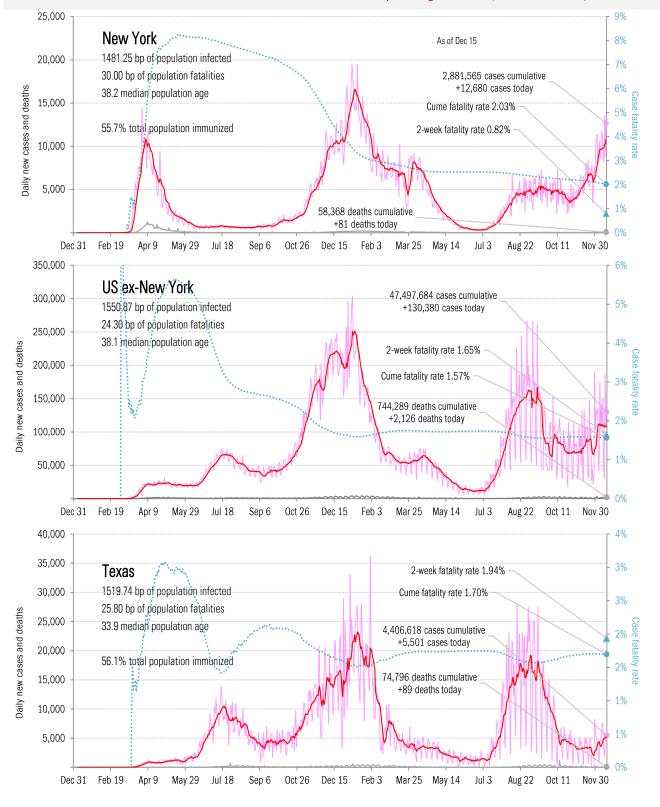
Alt requirement to <u>Open Up America Again</u>: 14-day "downward trajectory" in pos tests *14-day moving average, last 14 days Most recent value displayed* • High • Low Downward trajectory Five best Upward trajectory Five worst



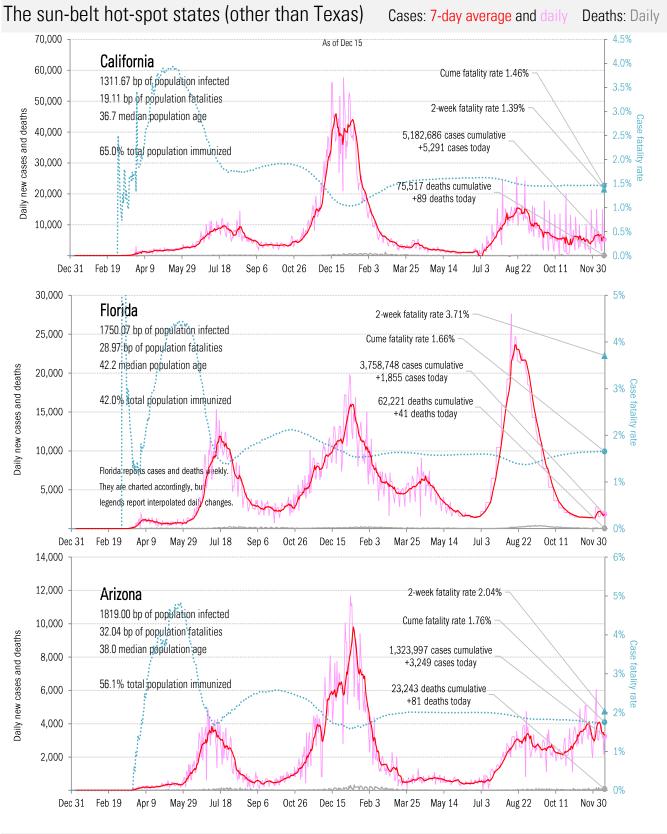
Source: Covid Act Now, TrendMacro calculations

From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations



Source: Johns Hopkins, TrendMacro calculations

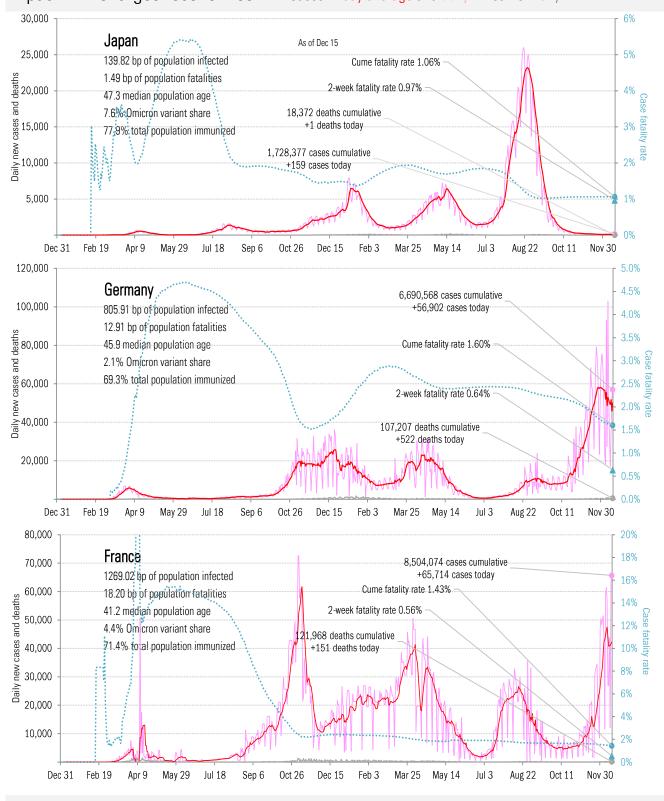
5,000 6% China As of Dec 15 4,500 0.81 bp of population infected 5% 4,000 0.03 bp of population mortalities 37.4 median population age 3,500 Daily new cases and deaths 4% Cume fatality rate 4.31% 80.5% total population immunized 3,000 Case 112,573 cases cumulative tatality rate 2,500 3% +76 cases today 2,000 2-week fatality rate 0.00% 2% 1,500 1,000 4,849 deaths cumulative 1% +0 deaths today 500 0% Dec 31 Apr 9 May 29 Jul 18 Sep 6 Oct 26 Dec 15 Feb 3 Mar 25 May 14 Jul 3 Aug 22 Oct 11 Nov 30 Feb 19 1,000,000 8% World ex-China 900,000 272,096,670 cases cumulative 438.94 bp of population infected 7% +737,970 cases today 8.59 bp of population mortalities 800,000 28.8 median population age 6% 700,000 Daily new cases and deaths 5% 600,000 Case fatality rate 500,000 4% 400,000 3% 300,000 2% Cume fatality rate 1.96% 200,000 2-week fatality rate 1.30% 1% 5,325,177 deaths cumulative 100,000 +9,097 deaths today 0% Dec 31 Feb 19 Apr 9 May 29 Feb 3 Jul 3 Oct 11 Nov 30 Jul 18 Sep 6 Oct 26 Dec 15 Mar 25 May 14 Aug 22

## Patient zero... and then everyone else

Cases: 7-day average and daily Deaths: Daily

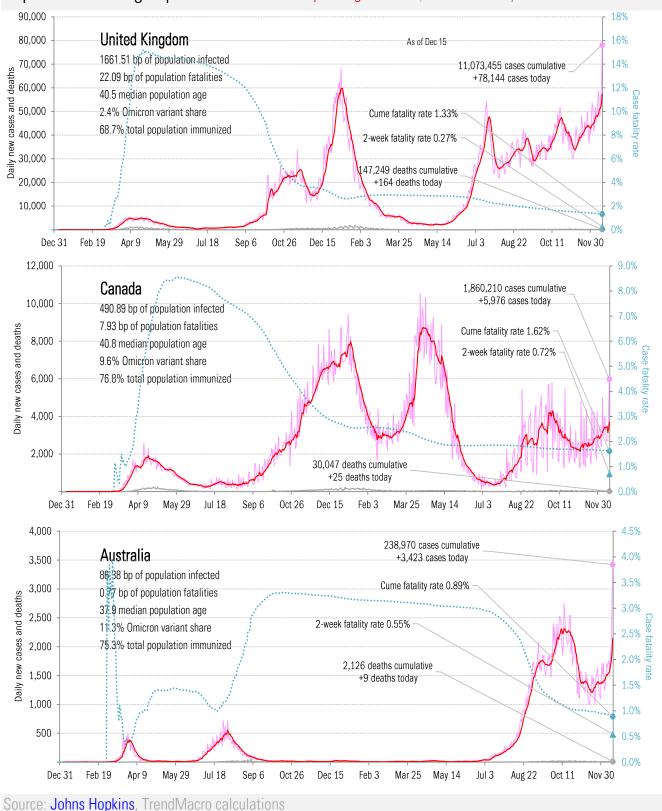
Source: Johns Hopkins, TrendMacro calculations

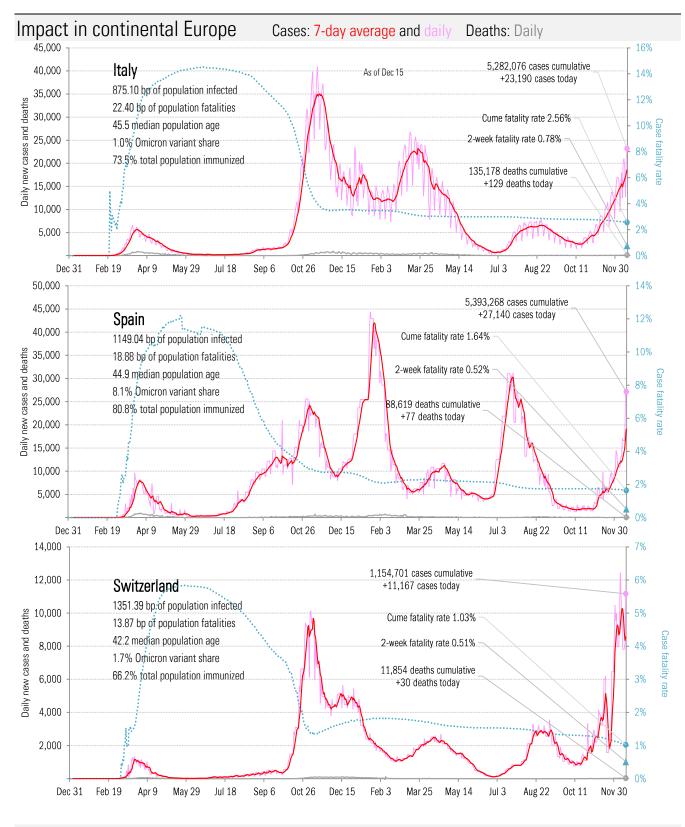
Impact in the largest economies Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations

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



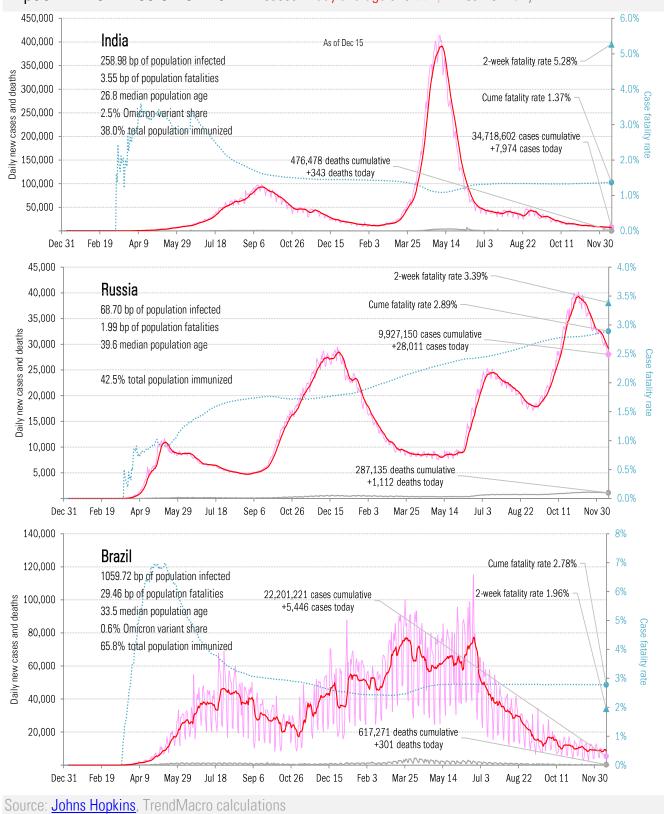


Source: Johns Hopkins, TrendMacro calculations

9,000 3.0% South Korea 8,000 As of Dec 15 2.5% 104.95 bp of population infected 7,000 544,117 cases cumulative deaths 0.87 bp of population fatalities +7,622 cases today 6,000 2.0% 41.8 médian population age p 5,000 5,000 4,000 3,000 2,000 1.5% 18.7% total population immunized 2-week fatality rate 1.55% rate Cume fatality rate 0.83% 1.0% 2,000 4,518 deaths cumulative 0.5% +62 deaths today 1,000 0.0% Feb 19 Nov 30 Dec 31 Apr 9 May 29 Jul 18 Sep 6 Oct 26 Dec 15 Feb 3 Mar 25 May 14 Aug 22 Oct 11 Jul 3 4,500 0.6% Singapore 4,000 2-week fatality rate 0.33% 0.5% 481.48 bp of population infected 3,500 0.17 bo of population fatalities Daily new cases and deaths 3,000 0.4% 34.6 median population age Cume fatality rate 0.29% 4.2% Omicron variant share 2,500 274.617 cases cumulative 87.0% total population immunized 0.3% +474 cases today 2,000 rate 0.2% 1,500 807 deaths cumulative +3 deaths today 1,000 0.1% 500 0.0% Feb 19 Oct 26 May 14 Dec 31 Apr 9 May 29 Jul 18 Sep 6 Dec 15 Feb 3 Mar 25 Jul 3 Aug 22 Oct 11 Nov 30 12,000 14% Sweden 1,242,733 cases cumulative 12% 10,000 1227.75 bp of population infected +4,044 cases today 15.04 bp of population fatalities 10% Daily new cases and deaths 40.9 median population age 8,000 Cume fatality rate 1.22% 4.3% Omicron variant share 2-week fatality rate 0.28% ase fatality rate 8% 71.9% total population immunized 6,000 15,221 deaths cumulative 6% +17 deaths today 4,000 4% 2,000 2% 0% Apr 9 May 29 Jul 18 Sep 6 Oct 26 Dec 31 Feb 19 Dec 15 Feb 3 Mar 25 May 14 Jul 3 Aug 22 Oct 11 Nov 30 Source: Johns Hopkins, TrendMacro calculations

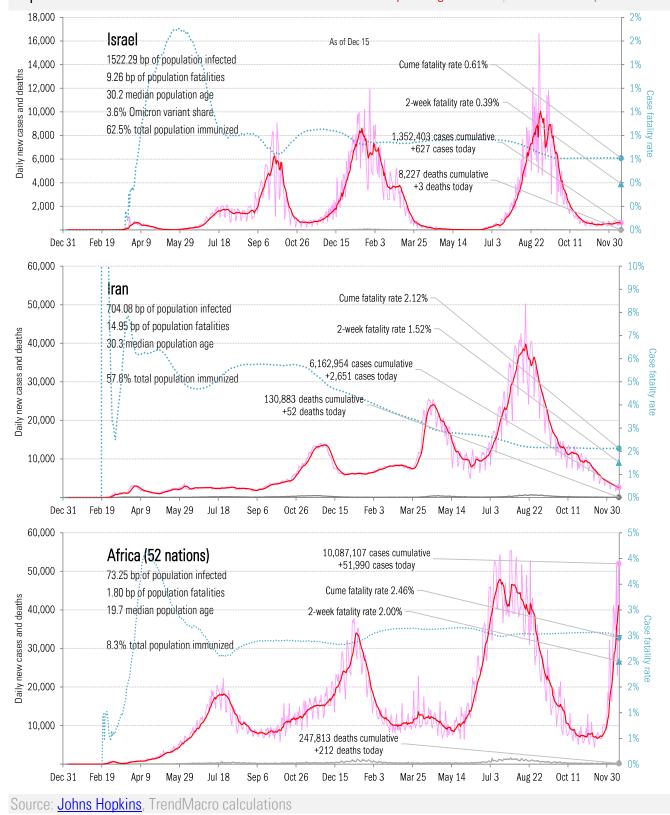
Impact in the BRICs ex-China Cases:

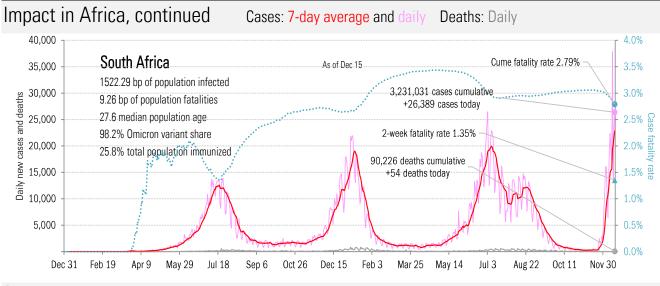
Cases: 7-day average and daily Deaths: Daily



Impact in the Middle East and Africa

Cases: 7-day average and daily Deaths: Daily





Source: Johns Hopkins, TrendMacro calculations