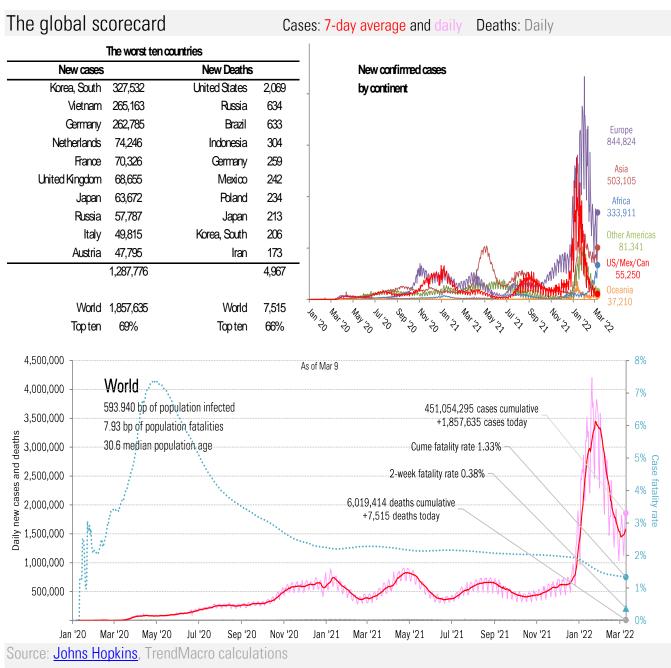


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

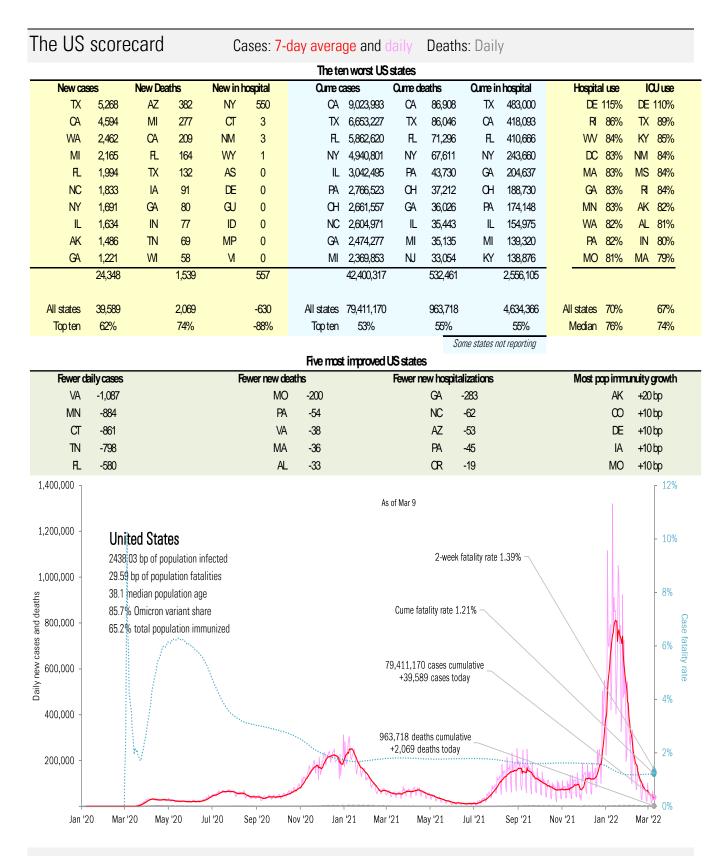
### Data Insights: Covid-2019 Monitor

Thursday, March 10, 2022



#### For more information contact us: Donald Luskin: 214 550 2121 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 tdemas@trendmacro.com

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

Kolling	j out th	e vacci	ines in	the US	s and t	he wor	d					
Administered Cumulative							To	day	Immunity	Full	Partial	
Doses 570,874,472		70,874,472					+0.154	million	US	65.2%	76.6%	
Boosters		96,753,756						+0.059	million	UK	72.0%	77.2%
		One dose		% Pop Immune		% рор	New immune today		France	77.7%	80.1%	
Total population		261,945,188		78%	78% 222,584		67%	+0.042 million		Spain	83.7%	87.9%
Age 12 to 17		17,404,122		69%		14,831,190	59%	+0.005	million	Germany	75.0%	75.7%
Age 18 to 64		176,529,806		87%			74%	+0.024	million	Italy	78.9%	83.9%
Age 65 and over		58,246,858		100%	100% 5		92%	+0.003 million		Australia	79.9%	85.7%
l%l										Israel	65.9%	72.1%
3% Moderna 38% Pfizer 59%		State								Canada	81.4%	85.7%
				Deed						Japan	79.6%	80.8%
				Best						Africa	14.2%	19.3%
		At least partial immunity								India	57.8%	69.5%
		as % population		Midd	18					Brazil	73.1%	83.5%
		Full immunity								China	85.5%	87.9%
		as % population		Wors	st					Global data differ	s due to source	s, timing
68.9%		"Immunity" = two doses				WI		As of Mar 9		ſ	ME	
61.3%						71.2%					89.4%	
						64.8%					78.5%	
	WA	ID	MT	ND	MN	L	MI	1	NY	VT	NH	
	79.9%	60.5%	64.6%	64.5%	74.5%	76.2%	66.4%		89.2%	92.9%	95.0%	
	71.7%	53.3%	56.1%	54.5%	68.4%	67.8%	59.5%		75.8%	80.4%	69.6%	
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		
	77.1%	74.2%	58.1%	75.2%	67.4%	60.8%	63.0%	83.6%	89.3%	95.0%		
	68.9%	59.9%	50.8%	60.1%	61.3%	54.2%	57.8%	67.2%	74.5%	77.8%		
	CA	UT	CO	NE	M0	KY	WV	VA	MD	CT	RI	
	82.0%	71.3%	78.5%	69.5%	65.5%	65.5%	64.3%	84.7%	85.2%	94.2%	95.0%	
	70.7%	63.4%	69.4%	62.7%	55.3%	56.6%	56.9%	72.2%	74.3%	78.0%	81.0%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		
		71.7%	86.2%	73.7%	65.9%	61.5%	82.6%	66.8%	95.0%	82.0%		
		60.4%	69.9%	60.5%	53.7%	53.8%	59.5%	56.1%	71.9%	67.9%		
				OK	LA	MS	AL	GA				
				70.1%	60.3%	58.9%	62.0%	64.5%				
HI	1			56.2%	52.7%	51.1%	50.4%	53.8%				
86.6%				TX				-	FL	l ľ	PR	
77.5%				71.4%					78.3%		95.0%	
	•			60.3%					66.1%		81.8%	
The demog	graphics of	US vaccinat	tion									

# Rolling out the vaccines in the LIS and the world



60%

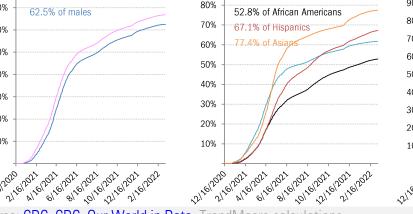
50%

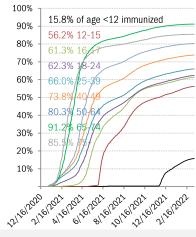
40%

30%

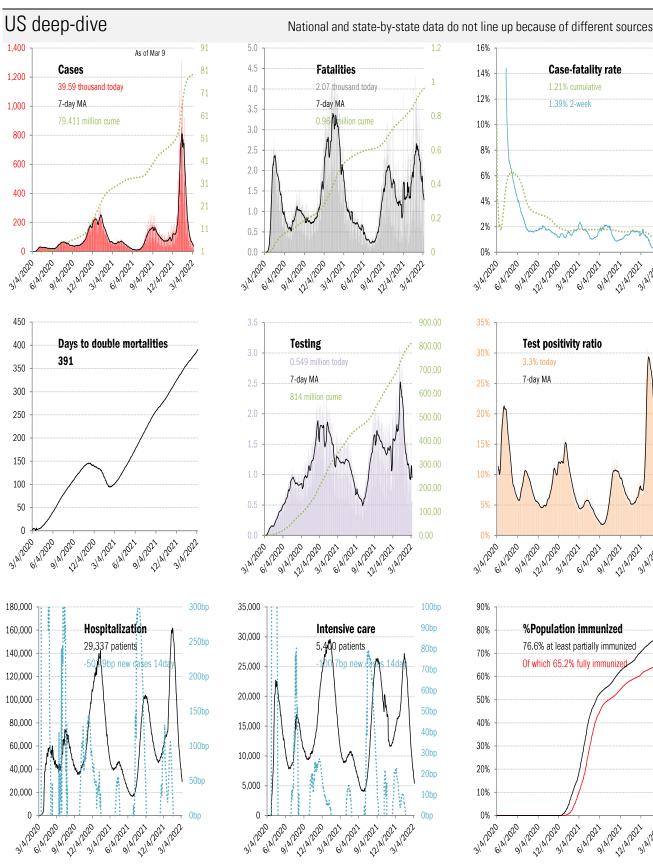
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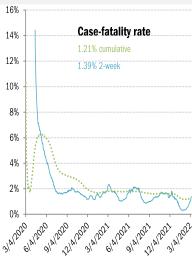
10%

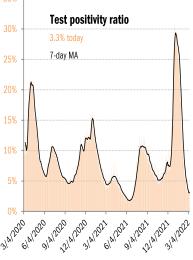


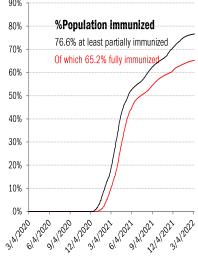


22/26/2020 Source: CDC, CDC, Our World in Data, TrendMacro calculations

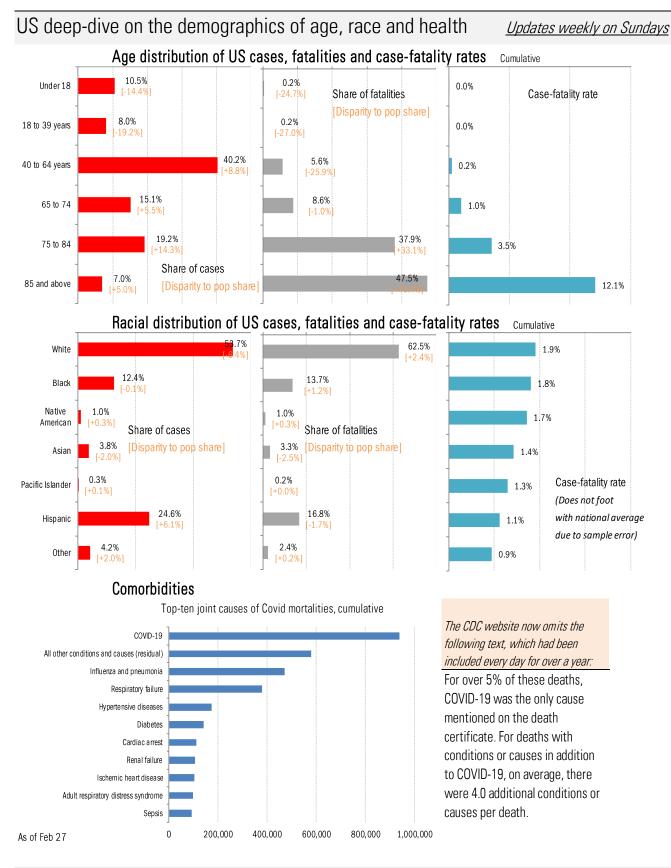








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

## Recommended reading

### <u>It's 'Alarming': Children Are Severely Behind in</u> Reading

Dana Goldstein *New York Times* March 8, 2022

### Empty Stores and an Exodus: Hong Kong's Covid Crackdown Stirs Panic

Alexandra Stevenson *New York Times* March 9, 2022

# DC 'freedom convoy' gets defeated by regular traffic for second day in a row

Shweta Sharma *The Independent* March 8, 2022

### <u>Rubio Speaks at Senate Foreign Relations Committee</u> <u>Hearing on Putin's Invasion of Ukraine, Condemns</u> Talks with Maduro

*Marco Rubio* March 8, 2022

### <u>China demands answers from US for '26 biolabs in</u> <u>Ukraine'</u>

Riyaz ul Khaliq *Anadolu Post* March 8, 2022

# <u>California officials raided preschool, interviewed 2-year-olds over mask policies</u>

Jessica Chasmar *Fox News* March 8, 2022

### <u>Letter #45, 2022</u>

<u>, Mon, Mar 7: Viganò</u> Archbishop Carlo Maria Viganò *Inside the Vatican* March 7, 2022

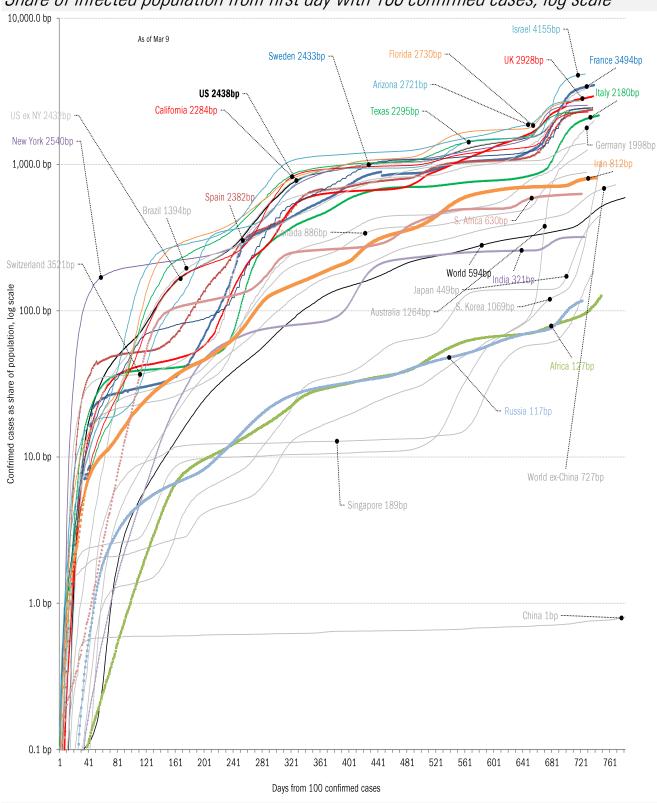
### <u>Viganò, Vatican critic, blames 'deep state' for</u> <u>Ukraine war, citing COVID-19 measures</u> Claire Giangravé

National Catholic Reporter March 8, 2022

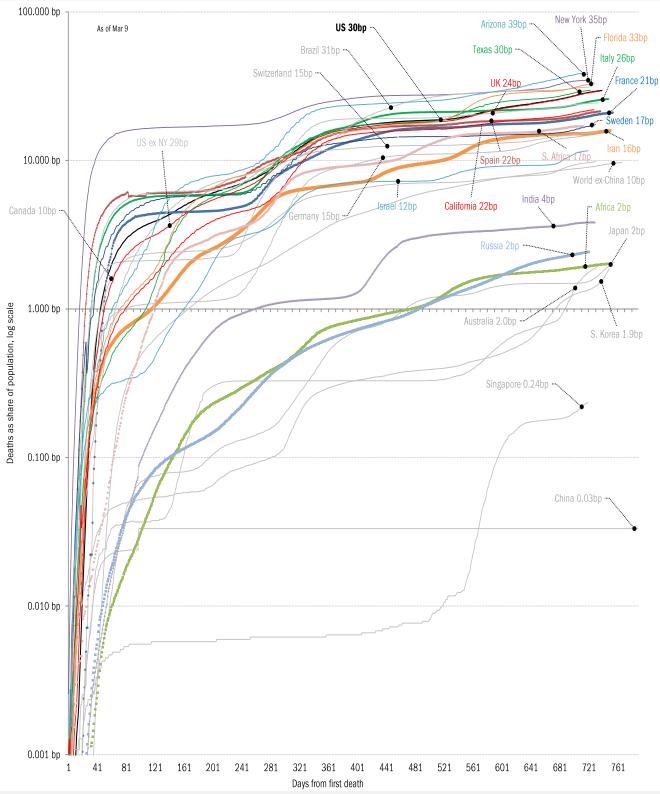
# Meme of the day

Google	cdc knew lockdowns cant stop viruses										
	Q All I News I Videos I Images ⊘ Shopping I More										
	About 15,200,000 results (0.88 seconds)										
	Did you mean: cdc new lockdowns can't stop viruses										

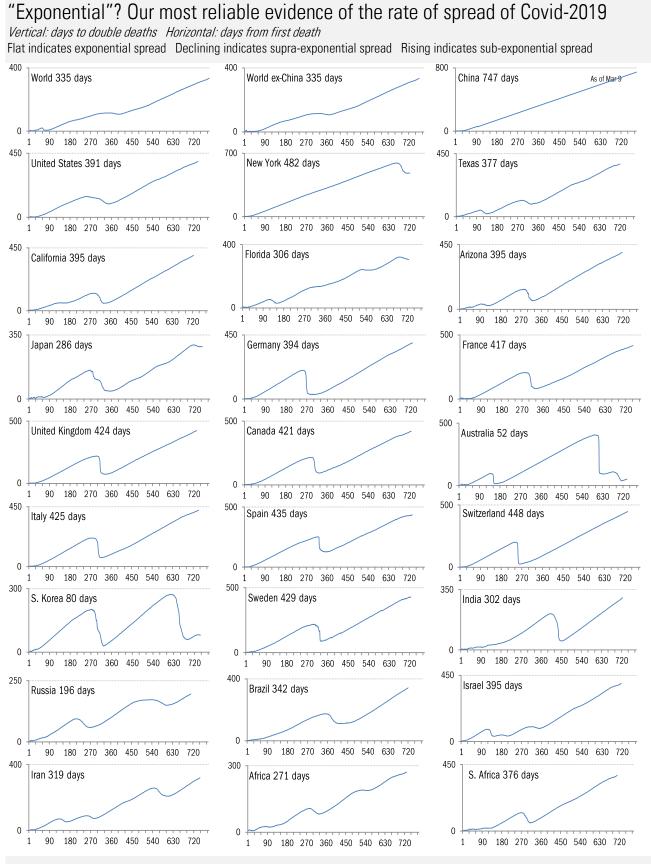
Source: Our beloved clients, **Power Line blog "The Week in Pictures"** and **CTUP** 



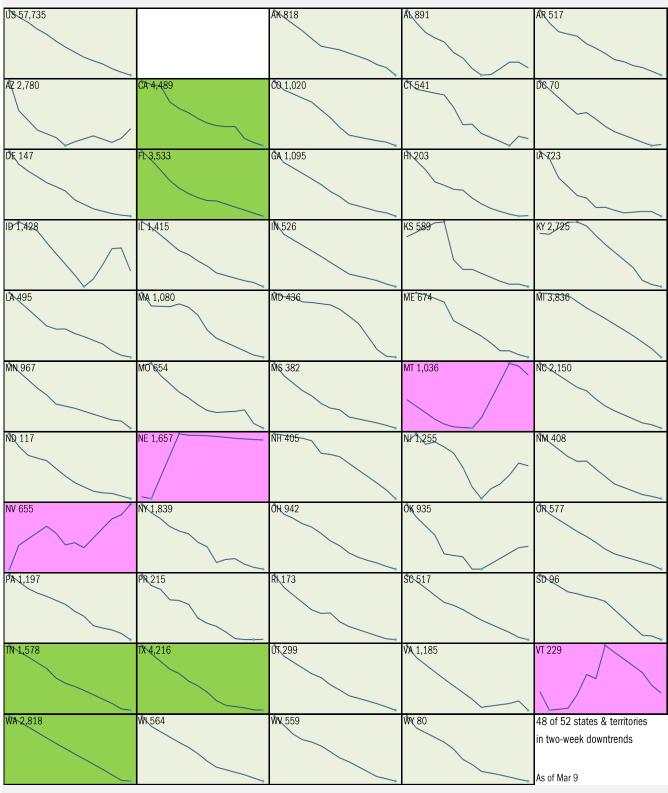
# The coronavirus <u>case</u> accelerometer... tracking the world's infection curves *Share of infected population from first day with 100 confirmed cases, log scale*



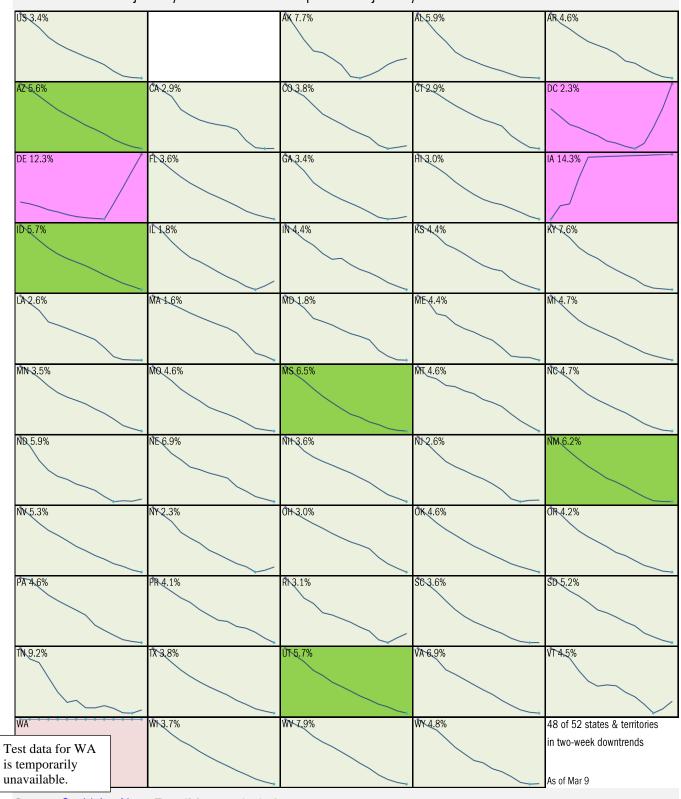
# The coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale*



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



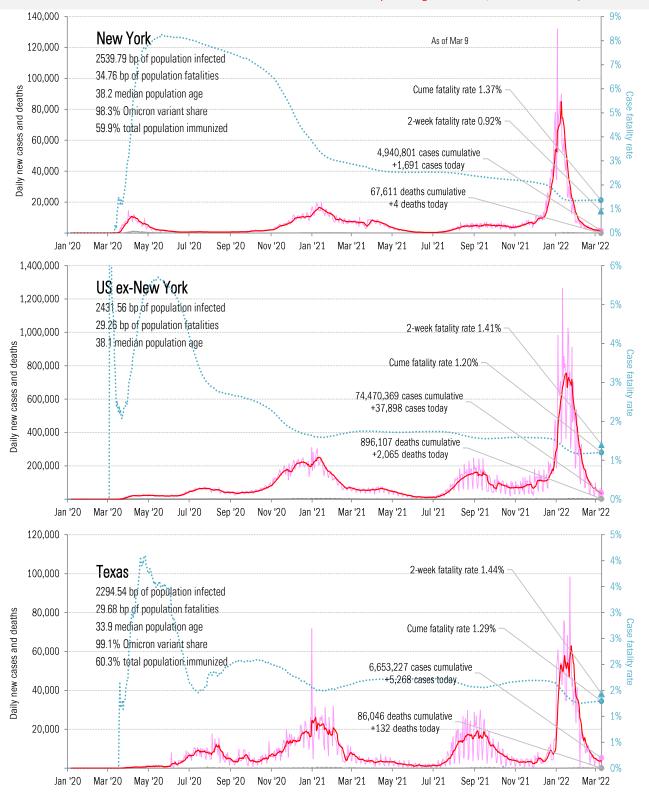
Alt requirement to <u>Open Up America Again</u>: 14-day "downward trajectory" in pos tests *14-day moving average, last 14 days Most recent value displayed* • High • Low Downward trajectory Five best Upward trajectory Five worst



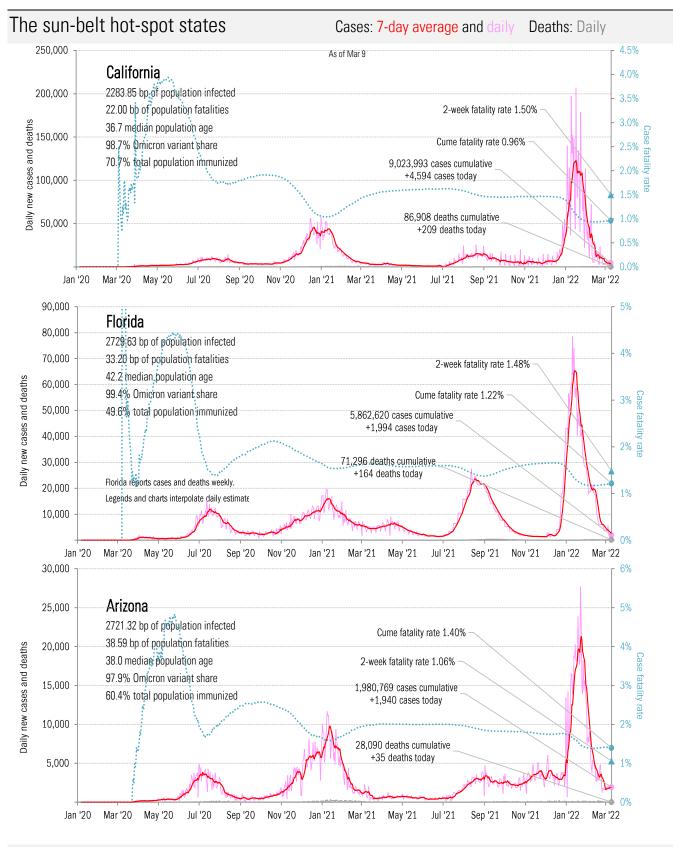
Source: Covid Act Now, TrendMacro calculations

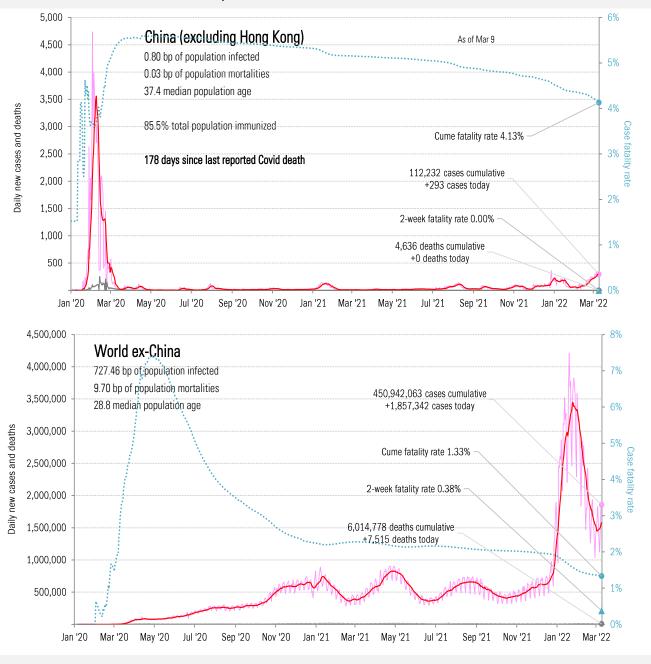
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations





Deaths: Daily

## Patient zero... and then everyone else Cases: 7-day average and daily

14

Source: Johns Hopkins, TrendMacro calculations

Impact in the largest economies Cases: 7-day average and daily Deaths: Daily 120,000 6% Japan As of Mar 9 100,000 5% 448.95 bp of population infected 5,549,755 cases cumulative 2.07 bp of population fatalities +63,672 cases today Daily new cases and deaths 80,000 47.3 median population age Cume fatality rate 0.46% Case fatality 100.0% Omicron variant share 2-week fatality rate 0.26% 60,000 3% 79.6% total population immunized 25,530 deaths cumulative 40,000 2% +213 deaths today 20,000 1% 0% Jan '20 Mar '20 May '20 Jul '20 Sep '20 Nov '20 Jan '21 Mar '21 May '21 Jul '21 Sep '21 Nov '21 Jan '22 Mar '22 450,000 5.0% Germany. 4.5% 400,000 1998.20 bp of population infected 16.588.872 cases cumulative 4.0% 350,000 15.06 bp of population fatalities +262,785 cases today Daily new cases and deaths 3.5% 300,000 45.9 median population age 66.3% Omicron variant share Cume fatality rate 0.75% 3.0% 250,000 75.0% total population immunized 2.5% 200,000 2.0% at 2-week fatality rate 0.12% 150,000 1.5% 125,028 deaths cumulative 100,000 1.0% +259 deaths today 50,000 0.5% 0.0% Mar '20 May '20 Sep '20 Nov '20 Jan '21 Jan '20 Jul '20 Mar '21 May '21 Jul '21 Sep '21 Nov '21 Jan '22 Mar '22 600,000 20% France 18% 500,000 3494.44 bp of population infected 16% 23,417,253 cases cumulative 21.01 bp of population fatalities Daily new cases and deaths 14% +70,326 cases today 400,000 41.2 median population age 12% 77.2% Omicron variant share Cume fatality rate 0.60% 300,000 77.7% total population immunized 10% 2-week fatality rate 0.16% 8% 200,000 6% 140,797 deaths cumulative 4% 100,000 +155 deaths today 2% 3.



Jul '20

Sep '20 Nov '20

May '20

Jan '20

Mar '20

Jan '21

Mar '21

May '21

Jul '21

0%

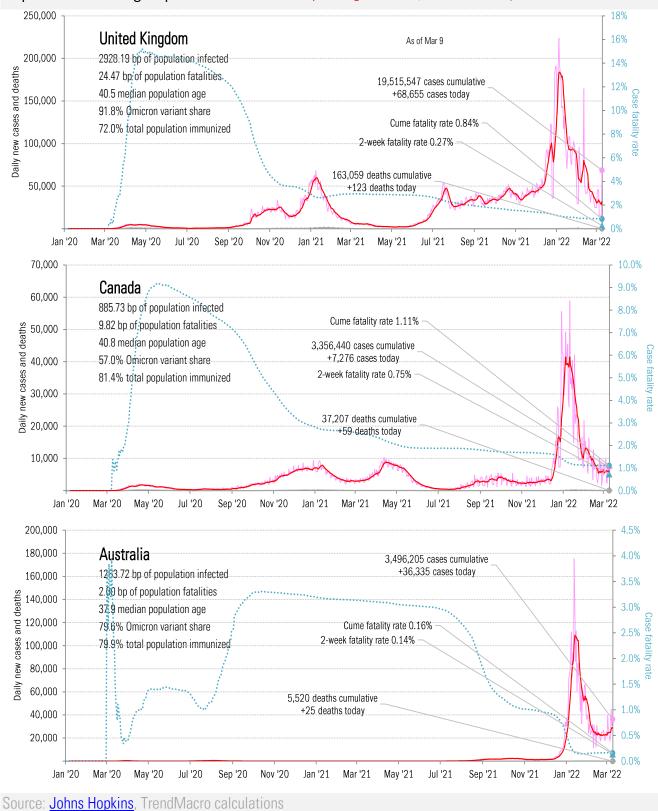
Mar '22

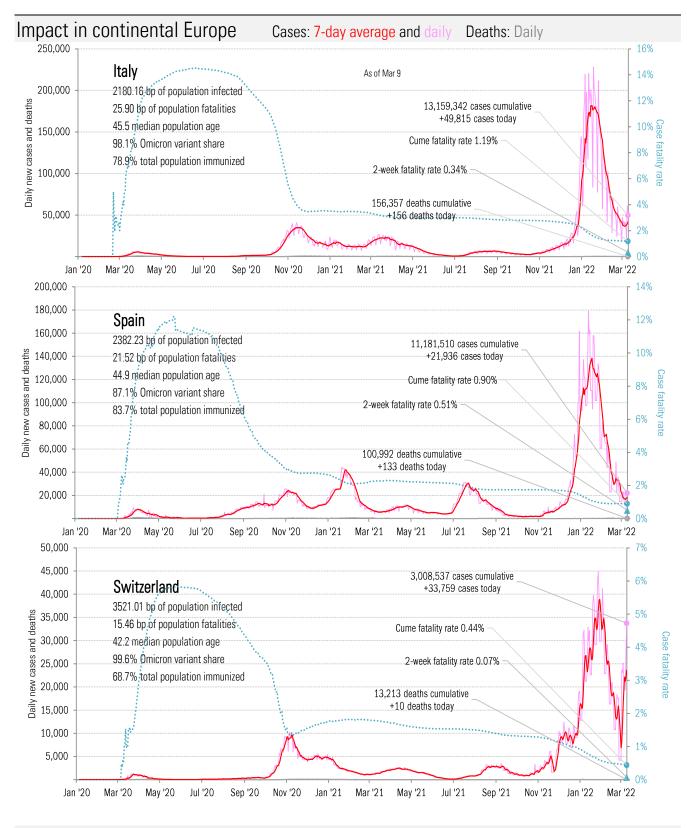
Nov '21

Sep '21

Jan '22

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

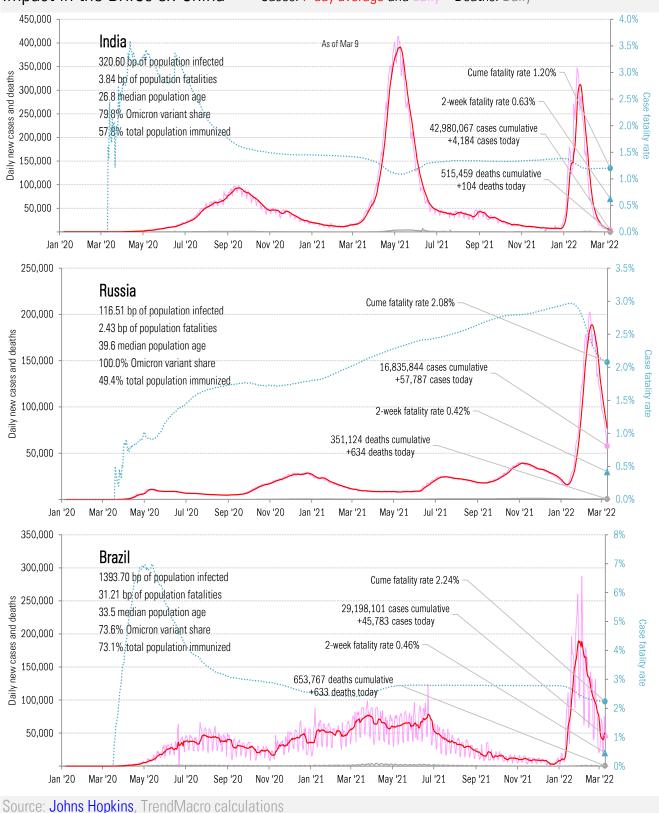




400,000 3.0% South Korea As of Mar 9 350,000 2.5% 1068.54 bp of population infected 5,539,650 cases cumulative 300,000 Daily new cases and deaths 1.86 bp of population fatalities +327,532 cases today 2.0% 41.8 median population age 250,000 Cume fatality rate 0.17% 200,000 1.5% 41.5% total population immunized 150,000 1.0% 2-week fatality rate 0.15% Teres. 100,000 9,646 deaths cumulative 0.5% +206 deaths today 50,000 0.0% Sep '21 Jan '20 Mar '20 May '20 Jul '20 Sep '20 Nov '20 Jan '21 Mar '21 May '21 Jul '21 Nov '21 Jan '22 Mar '22 30,000 0.6% Singapore 25,000 0.5% 1552.69 bp of population infected 0.24 bp of population fatalities 885,593 cases cumulative Daily new cases and deaths +13,084 cases today 20,000 0.4% 34.6 median population age 83.5% Omicron variant share Cume fatality rate 0.13% 90.5% total population immunized 15,000 0.3% 2-week fatality rate 0.07% 10,000 0.2% 1,110 deaths cumulative +9 deaths today 5,000 0.1% 0.0% Mar '20 Jul '20 Jan '20 May '20 Sep '20 Nov '20 Jan '21 Mar '21 May '21 Jul '21 Sep '21 Nov '21 Jan '22 Mar '22 60,000 14% Sweden 12% 50,000 2433.27 bp of population infected 2-week fatality rate 1.04% 17.48 bp of population fatalities 2,462,952 cases cumulative 10% Daily new cases and deaths 40.9 median population age 40,000 +2,169 cases today 95.4% Omicron variant share 8% Cume fatality rate 0.72% 74.8% total population immunized 30,000 6% 17,693 deaths cumulative 20,000 +144 deaths today 4% 10,000 2% 0% Mar '20 May '20 Jul '20 Sep '20 Nov '20 Jan '21 Mar '21 Jan '20 May '21 Jul '21 Sep '21 Nov '21 Jan '22 Mar '22 Source: Johns Hopkins, TrendMacro calculations

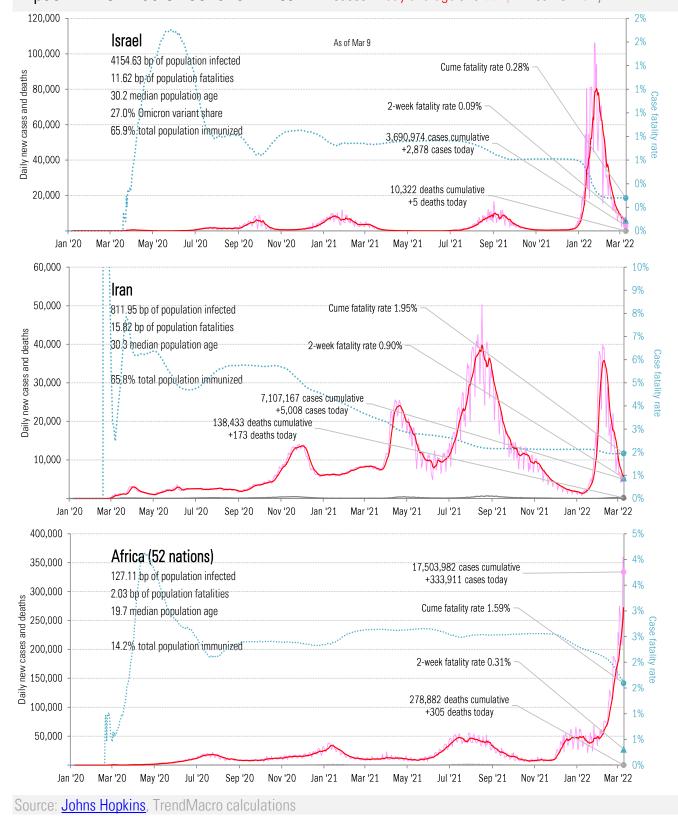
#### Impact in other hot-spots Cases: 7-day average and daily Deaths: Daily

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

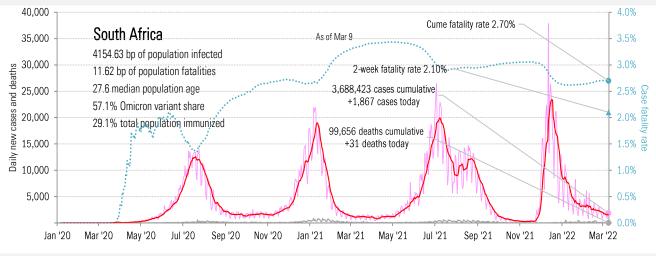


Impact in the Middle East and Africa

Cases: 7-day average and daily Deaths: Daily



# Impact in Africa, continued Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations