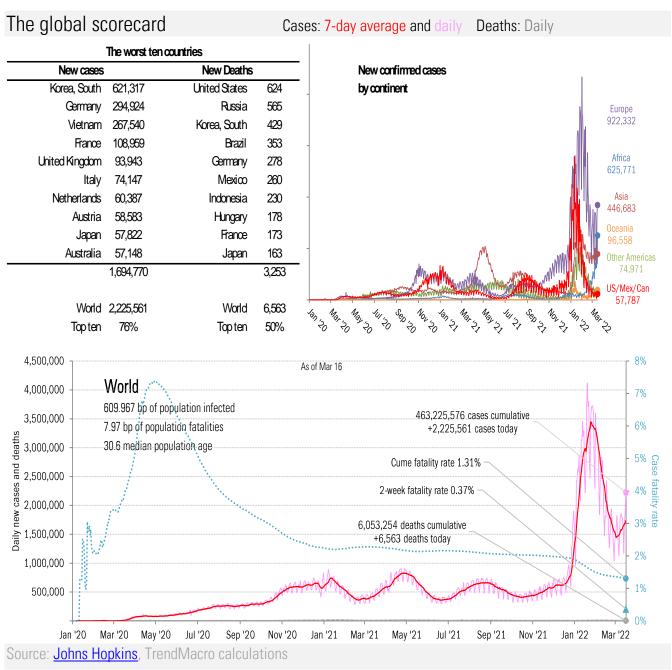


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

#### Data Insights: Covid-2019 Monitor

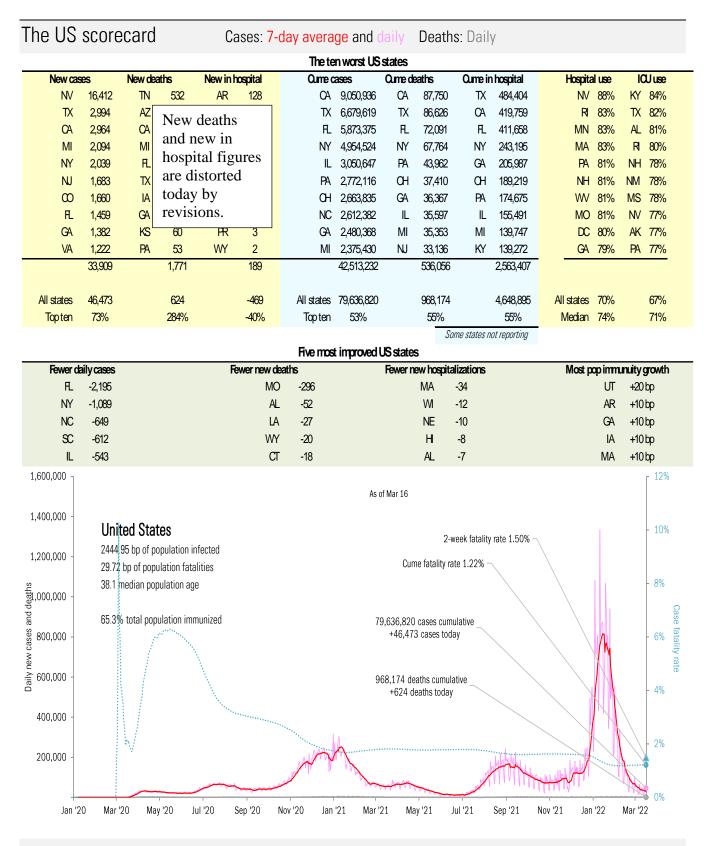
Thursday, March 17, 2022



#### For more information contact us: Donald Luskin: 214 550 2121 <u>don@trendmacro.com</u>

Thomas Demas: 704 552 3625 tdemas@trendmacro.com

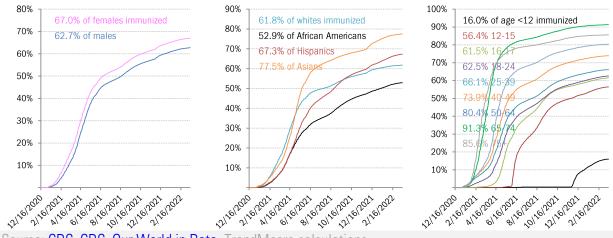
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Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

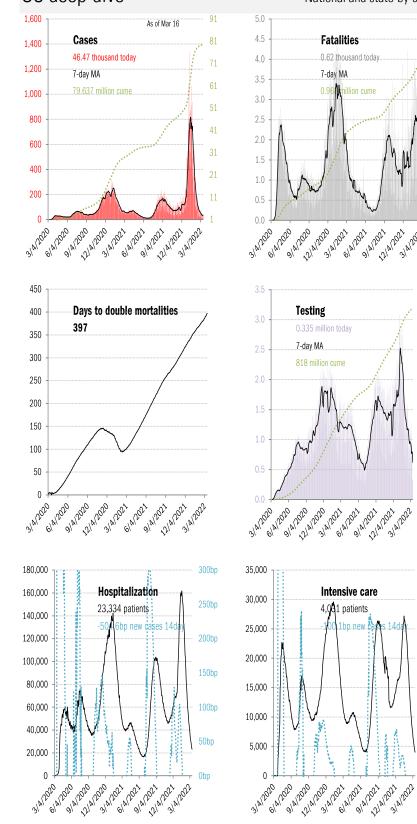
Rolling	out th	e vacc	ines in	the US	S and t	he wor	ld					
Administered Cumulative							То	day	Immunity	Full	Partial	
Doses	loses 572,648,576		72,648,576					+0.120	million	US	65.3%	76.7%
Boosters		97,492,539					+0.047 million		UK	72.2%	77.3%	
		One	One dose		% Pop Imr		<b>% pop</b> 67%	New imm	une today	France	77.8%	80.1%
Total popul			62,399,377	79%	2	223,059,115		+0.031 million		Spain	85.2%	87.9%
-	Age 12 to 17		17,457,205			14,883,741	59% 74%	+0.004 million		Germany	75.1%	75.8%
	0		76,809,732	87%	1	149,935,398		+0.017 million		Italy	79.1%	84.0%
Age 65 and	Age 65 and over 58,266,48		58,266,489	100%		50,430,536	92%	+0.003 million		Australia	80.7%	85.9%
۲&۲										Israel	65.9%	72.1%
0%										Canada	81.6%	85.8%
Moderna	St.	State							Japan	79.7%	81.0%	
Pfizer c10/			110	Best						Africa	14.2%	19.7%
			tial immunity	Midd	lo					India	58.6%	69.6%
			•	Wildle						Brazil	74.0%	84.1%
Full initiality				Worst					China	85.8%	88.1%	
AK		as % population							Global data diffe		s, timing	
69.0%		"Immunity" = two doses		<b>WI</b> 71.3%		WI	As of Mar 16				ME	
61.4%											89.3%	
					-	64.9%		•			78.6%	
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	80.1%	60.5%	64.7%	64.6%	74.6%	76.3%	66.5%		89.3%	92.7%	95.0%	
	71.8%	53.4%	56.2%	54.6%	68.6%	67.9%	59.6%		75.9%	80.4%	69.5%	
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		
	77.2%	74.4%	58.2%	75.3%	67.5%	60.9%	63.1%	83.7%	89.4%	95.0%		
	69.0%	60.0%	50.9%	60.3%	61.4%	54.3%	57.9%	67.3%	74.7%	78.0%	-	
	CA	UT	CO	NE	MO	KY	WV	VA	MD	СТ	RI	
	82.2%	71.5%	78.7%	69.6%	65.6%	65.6%	64.4%	84.8%	85.3%	94.3%	95.0%	
	70.9%	63.6%	69.5%	62.8%	55.4%	56.8%	57.0%	72.3%	74.4%	78.2%	81.2%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		
		71.9%	86.4%	73.8%	66.0%	61.6%	82.8%	67.0%	95.0%	82.1%		
		60.5%	70.0%	60.6%	53.8%	53.8%	59.7%	56.4%	72.1%	68.1%		
				OK	LA	MS	AL	GA				
	1			70.3%	60.5%	59.0%	62.1%	64.7%				
HI				56.3%	52.9%	51.3%	50.5%	54.0%				
86.8%			TX					FL		PR		
77.6%			71.7%					78.4%		95.0%		
				60.5%					66.2%	] [	81.9%	

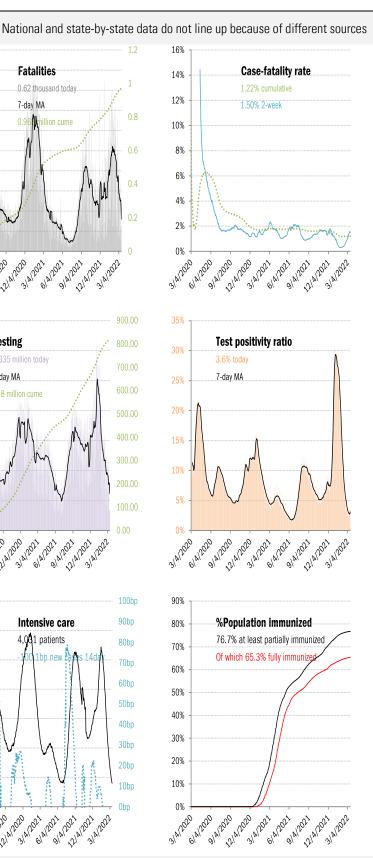
#### The demographics of US vaccination



Source: <u>CDC</u>, <u>CDC</u>, <u>Our World in Data</u>, TrendMacro calculations

### US deep-dive





0.8

31412022

900.00

800.00

400.00

100bp

90bp

80bp

70bp

60bp

50bp

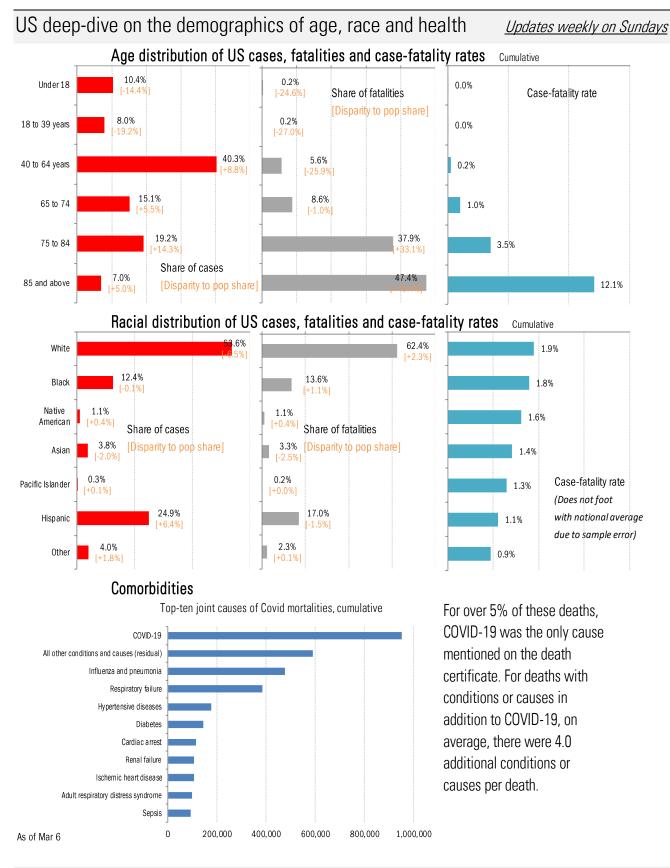
40bp

30bp

20bp

10bp 0bp

Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

## Recommended reading

As virus data grows, the J.&J. vaccine holds its own.

Apoorva Mandavilli *New York Times* March 16, 2022 Pfizer asks US to allow 4th COVID vaccine dose for seniors Zeke Miller and Lauran Neergaard

AP March 15, 2022

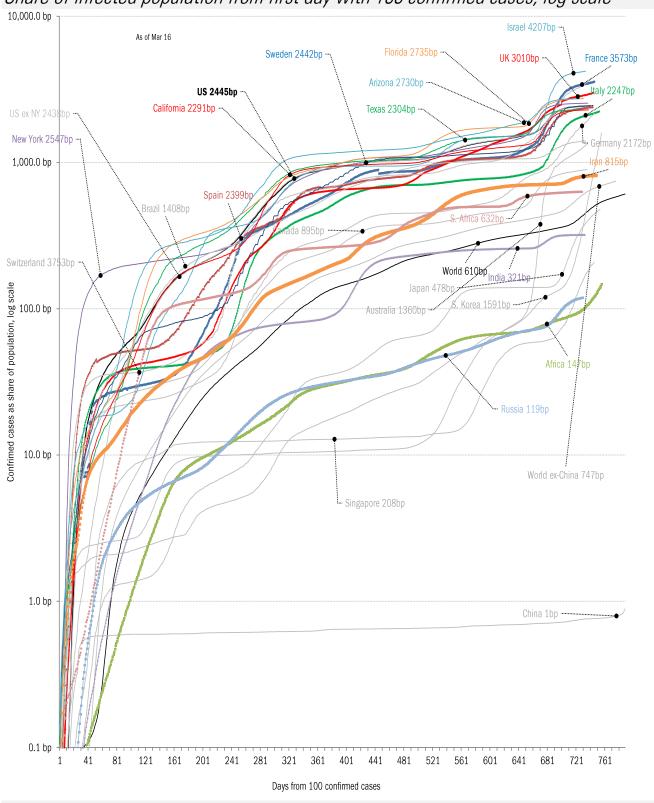
<u>Compromise reached on COVID-19 vaccine</u> <u>intellectual property rights waiver</u> Ashley Furlong *Politico* March 15, 2022

#### Meme of the day

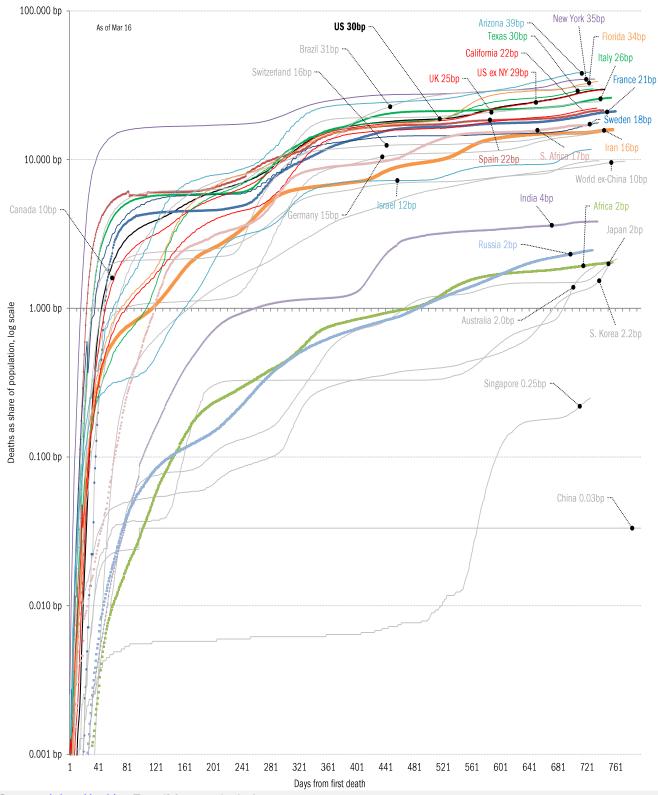
The CDC is now recommending you wear a face mask over your eyes when pumping gas to prevent heart attacks.



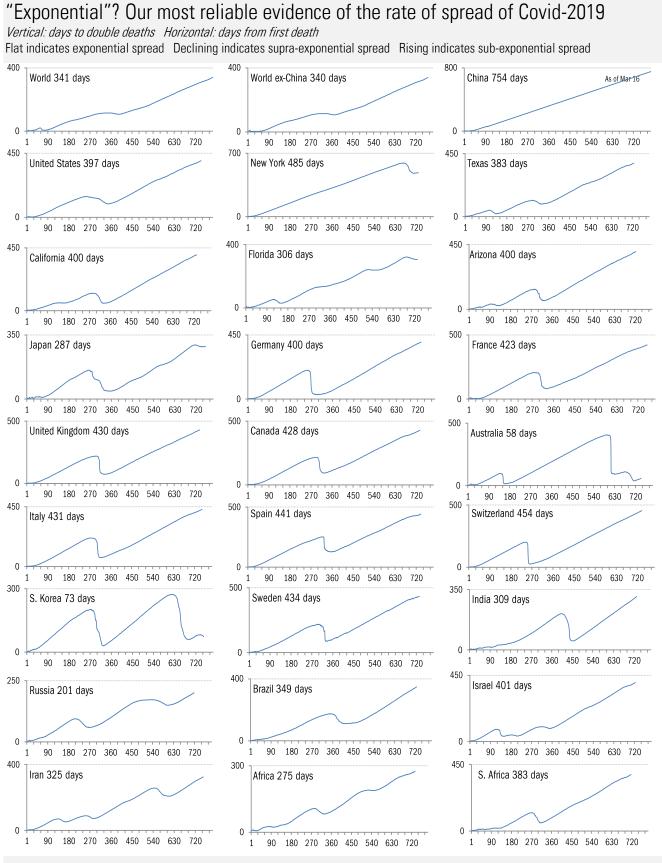
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

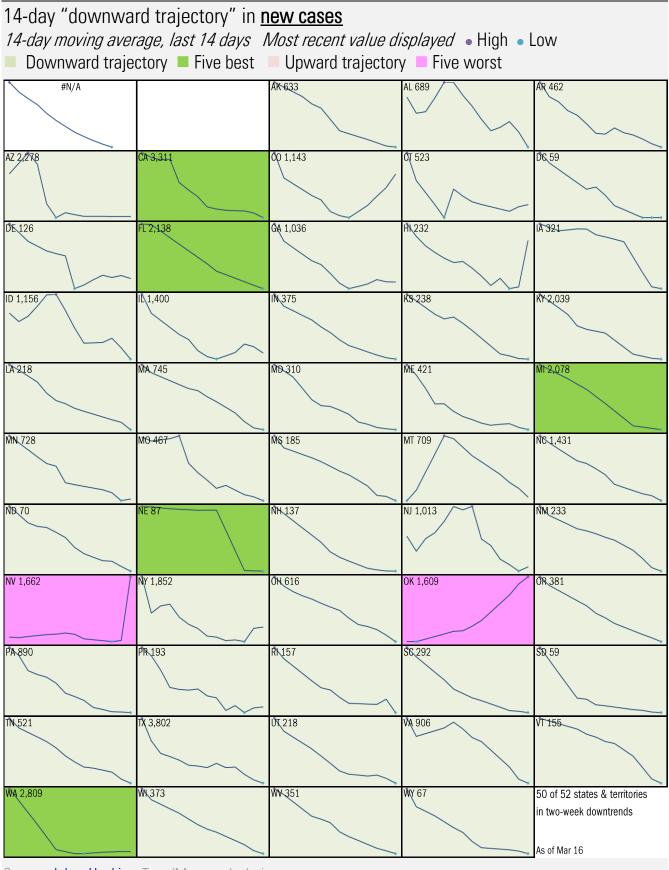


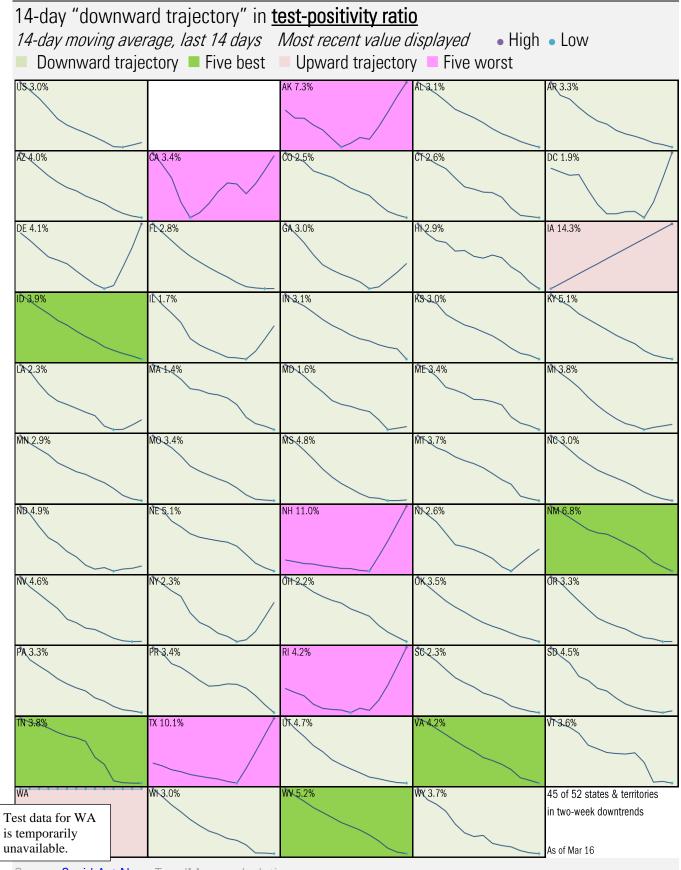
## The coronavirus <u>case</u> accelerometer... tracking the world's infection curves *Share of infected population from first day with 100 confirmed cases, log scale*



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



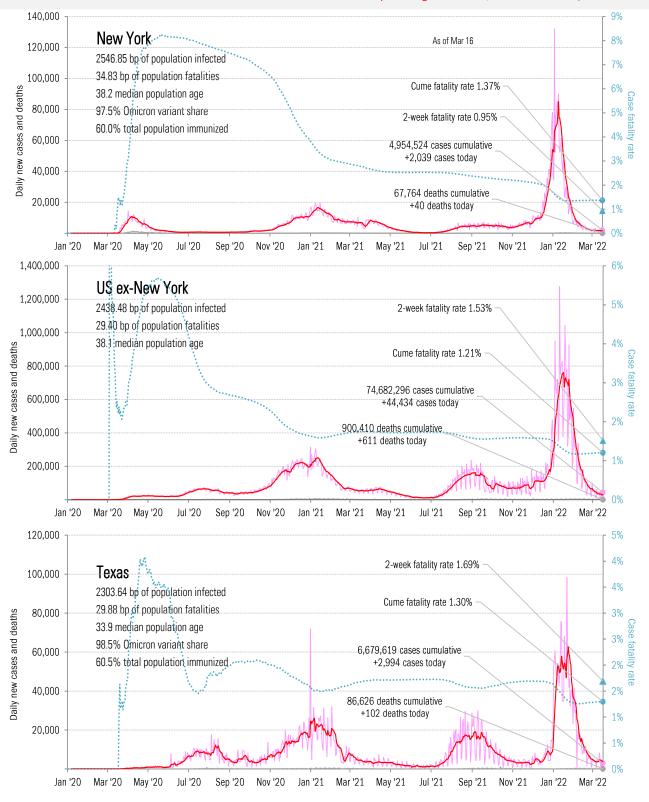




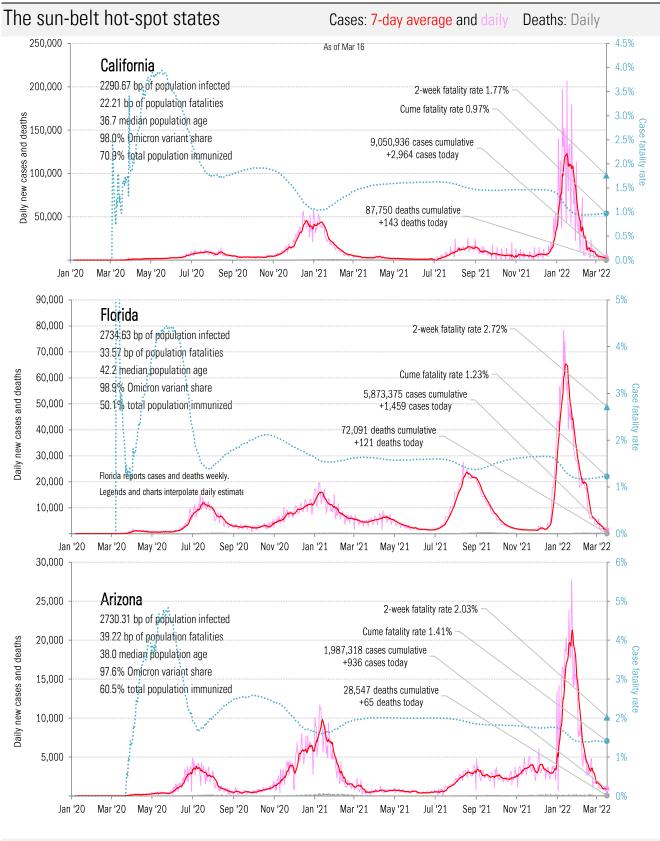
Source: Covid Act Now, TrendMacro calculations

From Ground Zero to the Rio Grande

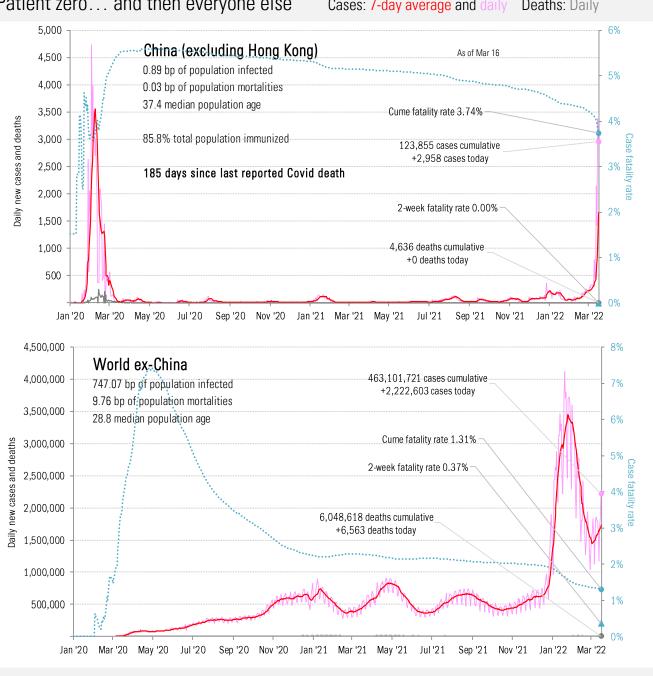
Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations



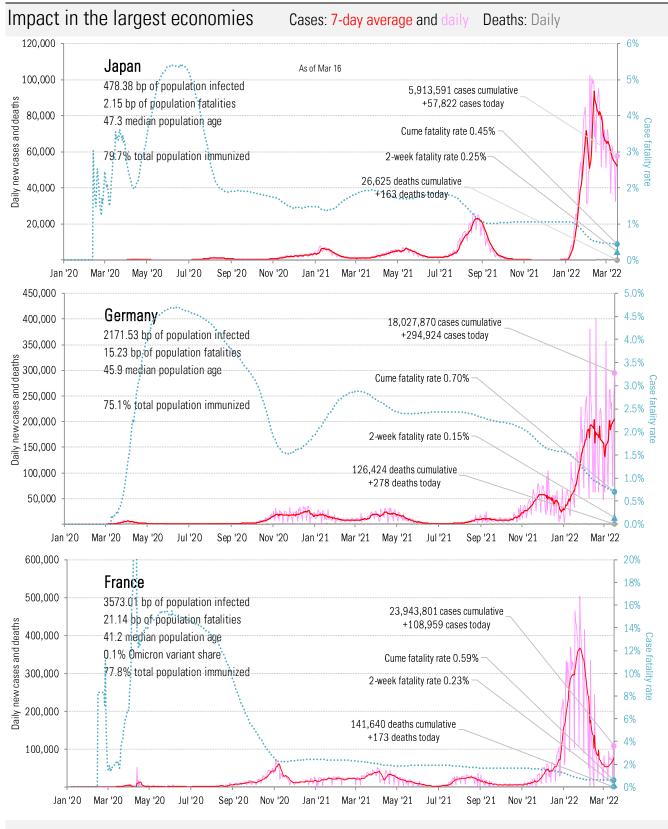
Source: Johns Hopkins, TrendMacro calculations



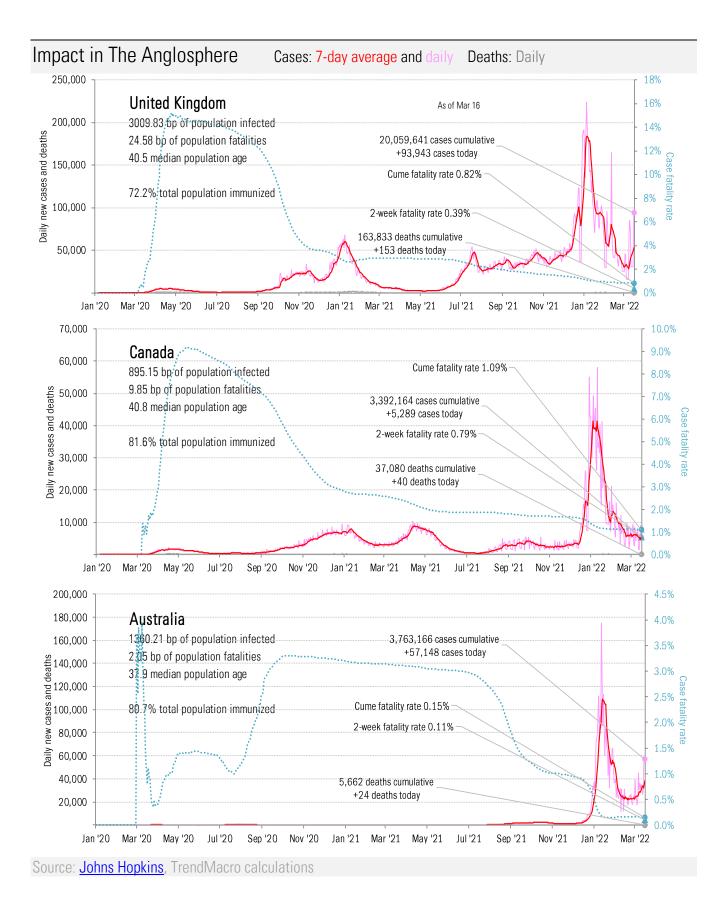
Patient zero... and then everyone else

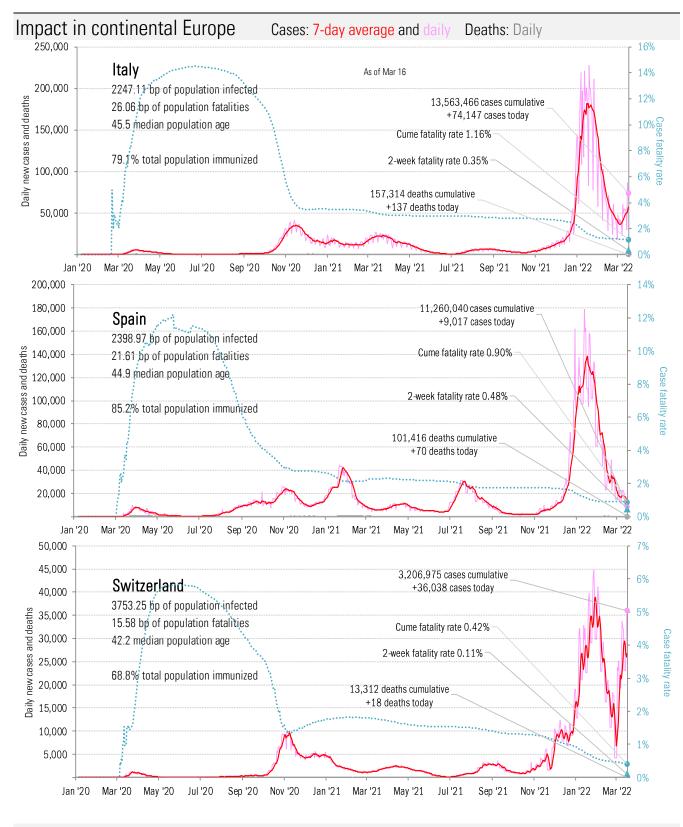
Cases: 7-day average and daily Deaths: Daily

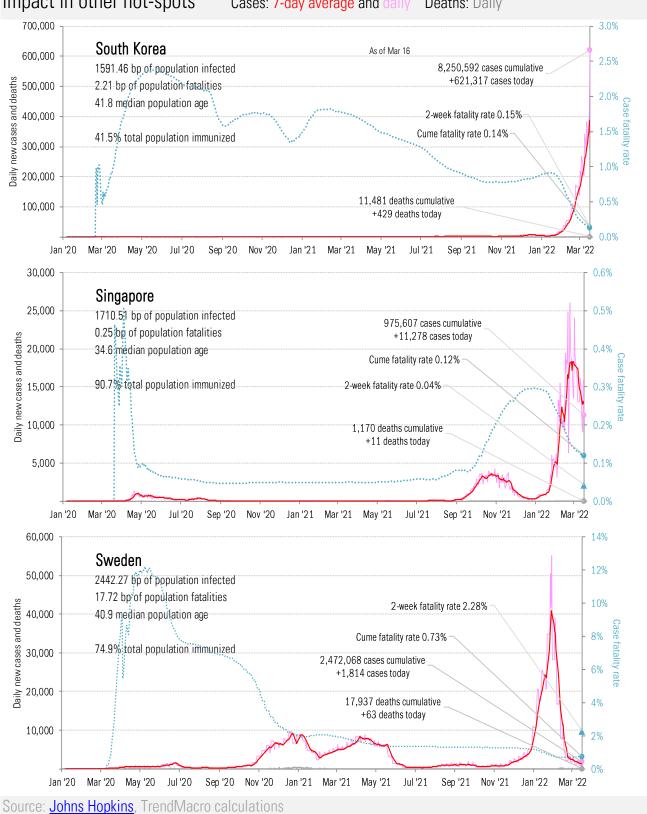
Source: Johns Hopkins, TrendMacro calculations



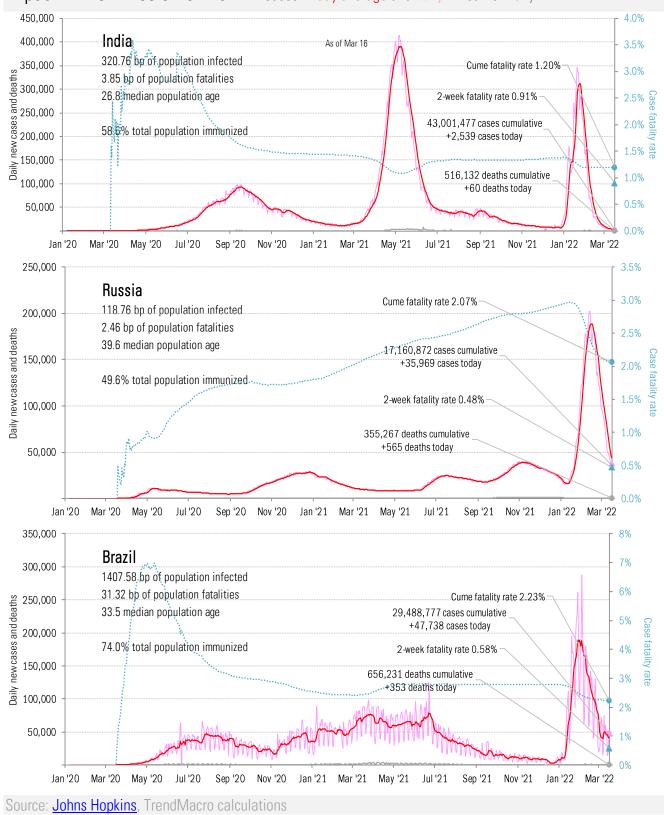
Source: Johns Hopkins, TrendMacro calculations

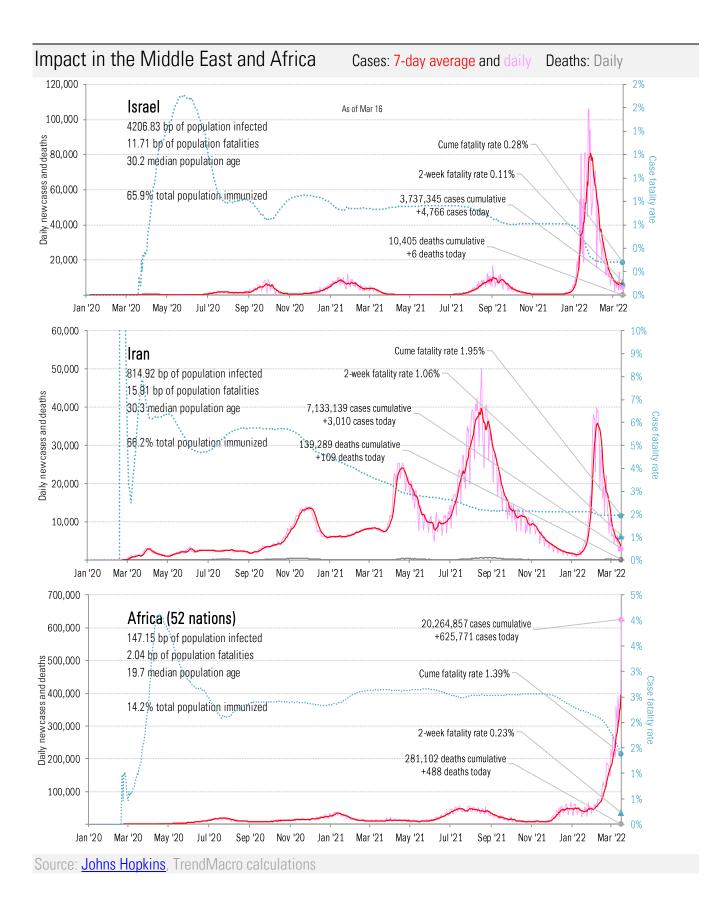


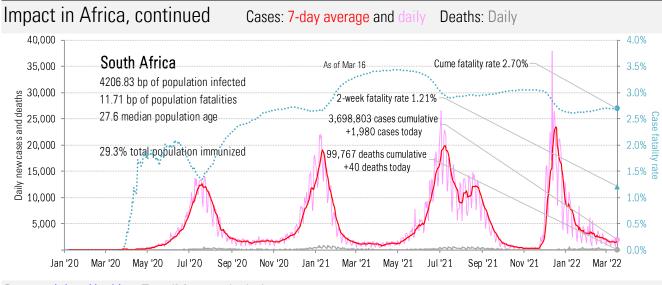




Impact in the BRICs ex-China Cases: 7-day average and daily Deaths: Daily







Source: Johns Hopkins, TrendMacro calculations