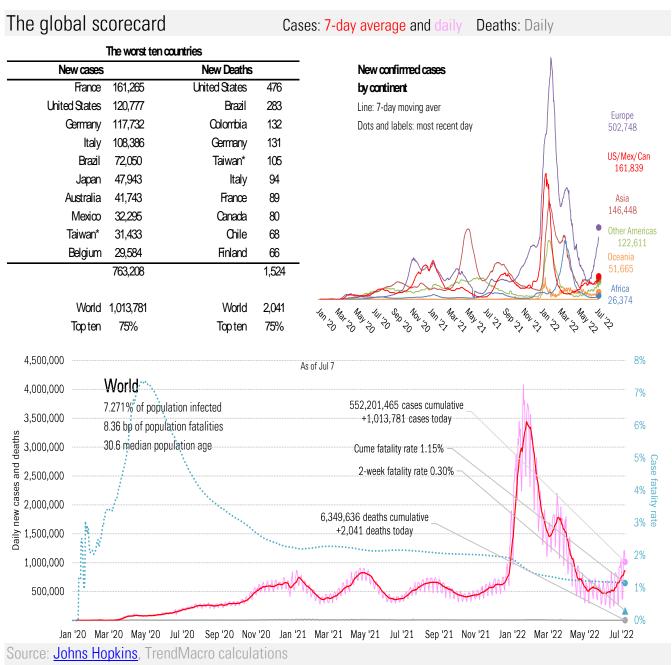


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

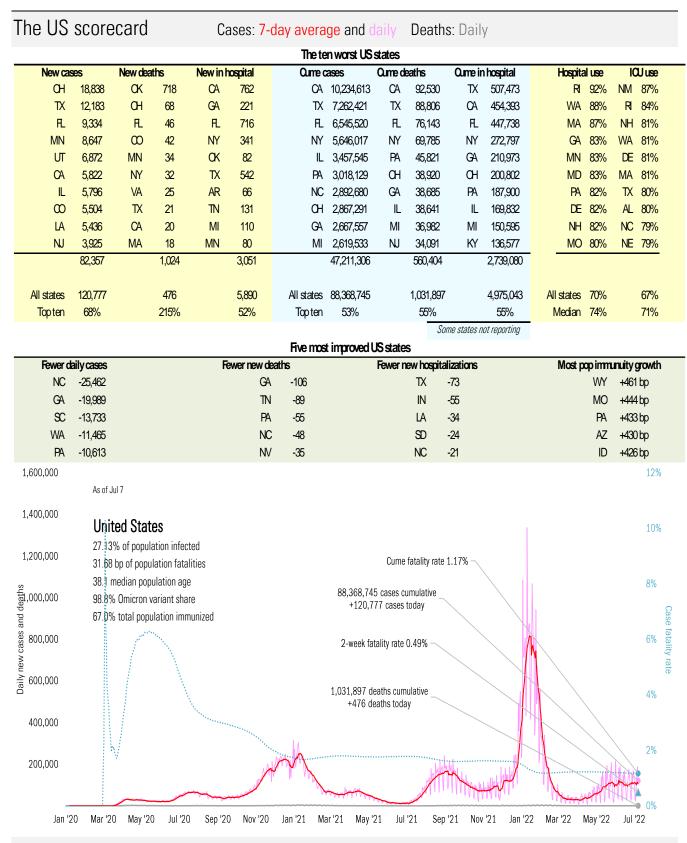
Data Insights: Covid-2019 Monitor

Friday, July 8, 2022

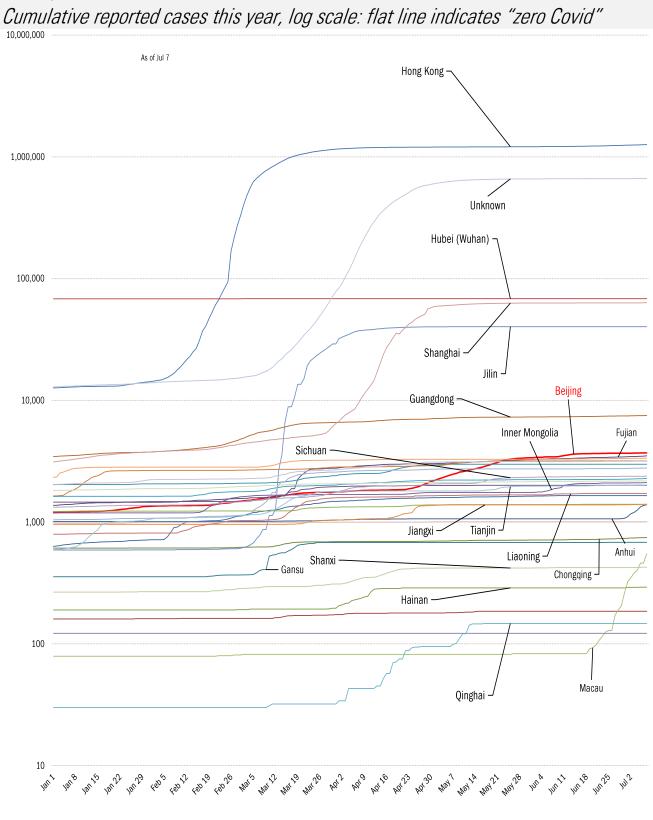


For more information contact us: Donald Luskin: 214 550 2121 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 tdemas@trendmacro.com

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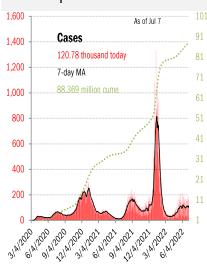
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

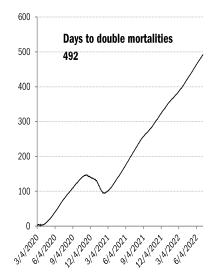


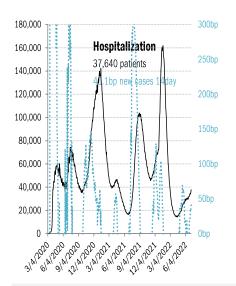
China provincial coronavirus <u>case</u> accelerometer... tracking the "zero Covid" curves *Cumulative reported cases this year, log scale: flat line indicates "zero Covid"*

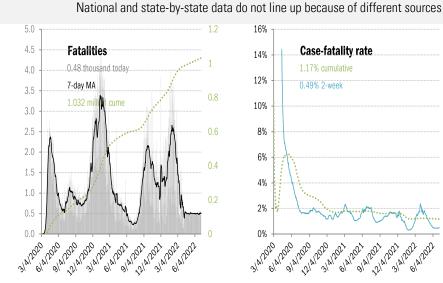
Rolling out t	he vac	cines ii	n the l	JS and	I the w	orld			<u>Upda</u>	tes wee	kly on Fri
dministered	Cumulative						To	day	Immunity	Full	Partial
oses	61	2,676,095					+0.208	million	US	67.0%	78.4%
of which boosters	10	8,590,845					+0.050	million	UK	73.6%	78.6%
	One dose		% Pop Immune		% рор	New immune today		France	78.5%	80.8%	
tal population	26	8,330,668	80%	22	228,738,120			million	Spain	86.8%	88.3%
ge 12 to 17	17,958,024		71%	1	5,363,062	61%	+0.003	million	Germany	75.5%	77.1%
ge 18 to 64	17	9,904,326	88%	15	2,678,815	75%	+0.015	million	ltaly	79.4%	84.2%
ge 65 and over	5	9,439,014	100%	5	51,975,143	95%	+0.005	million	Australia	84.1%	86.7%
٢٦٢									Israel	66.2%	72.3%
3%									Canada	82.6%	86.1%
C+-+-		oto	Peet						Japan	81.2%	82.3%
odema 38% At least partial in		ale	Best						Africa	19.8%	25.2%
		tial immunity	N.C.J.J						India	65.9%	73.0%
Pfizer 59%	as % po	opulation	Midd	10					Brazil	79.1%	86.4%
Full immunit		nmunity							China	87.3%	89.6%
AK as % population		opulation	Wors	st					Global data diff	ers due to sou	rces, timing
0.8%	"Immunity" = two doses				WI		As of Jul 7			ME	
2.8%					72.5%					92.2%	
					66.2%					80.6%	
WA	ID	MT	ND	MN	IL	MI]	NY	VT	NH	
81.8%	62.4%	65.9%	66.3%	75.9%	76.4%	67.5%		91.2%	94.8%	89.7%	
73.0%	55.9%	57.4%	56.1%	69.8%	69.1%	60.7%		77.9%	82.0%	71.7%	
OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA	7 70	1
78.7%	76.2%	58.7%	77.9%	68.5%	62.7%	63.8%	86.3%	91.5%	95.0%		
70.3%	61.5%	51.4%	62.7%	62.5%	56.5%	58.8%	69.7%	76.5%	80.1%		
CA	UT	CO	NE	M0	KY	WV	VA	MD	CT	RI	
83.1%	72.8%	80.4%	71.0%	66.9%	66.8%	65.6%	86.9%	87.8%	95.0%	95.0%	
72.9%	64.8%	70.9%	64.1%	56.7%	57.9%	58.2%	73.9%	76.5%	80.2%	83.8%	
72.070	AZ	NM	KS	AR	TN	NC	SC	DC	DE	00.070	1
	74.4%	89.2%	73.3%	67.5%	62.8%	86.0%	68.5%	95.0%	84.3%		
	62.5%	72.1%	62.6%	55.1%	55.0%	62.6%	57.7%	76.3%	70.2%		
	02.070	72.170	0 <u>2.0</u> 70	LA	MS	AL	GA	70.070	70.270		
			71.9%	61.6%	60.2%	63.3%	66.2%				
HI			58.0%	54.0%	52.3%	51.6%	55.5%				
8.6%			TX	J 4 .070	JZ.J /0	JT.U /0	00.070	FL	1 1	PR	1
9.1%			74.5%					80.2%		95.0%	
5.170			62.4%					67.7%		83.7%	
		ļ	02.4 /0					U7.7/0	1 1	03.7 /0	1
e demographics	of US va	ccination									
30%]	90%				100%	4 7 0 6 7 7					
70% 68.7% of females immunized			80% 63.2% of whites immunized				90% -		ge <12 immu	nized	
64.3% of males			54.5% of African Americans				80% 58.3% 12-15				
60%			70% 69.2% of Hispanics				63.3% 16-17				
50%			60%79.3% of Asians				04.1% 18-24				
			50%				60% 67.4% 25.39				
40%			40%				50% - 74:9% 40-49				
30% -							40% - 81.9% 50/64				
			30%				30% - 93.9% 65-74				
20%			20%				20% - 8849/15-				
10%			10%								
	1070				10% -	PI	(
	\\		+		~ ~ ~	1 <u>1</u> <u>1</u>	+	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~		
151202 1151202 1151202	12/15/2021 4/15/	2021	215/2022	04,002,002,00 04,002,002,002,002,002,002,002,002,002,0	12/202202202	5/222026	12/15/2020	*11512021 811512	022 12/15/2021 AI	512021	
urce: CDC, CD	<u>C, Our W</u>	/orld in D					, 				

US deep-dive

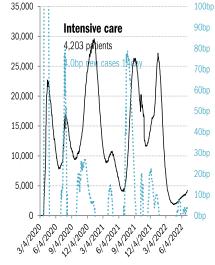


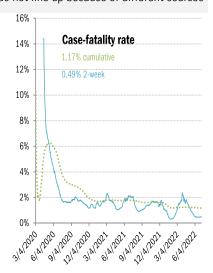


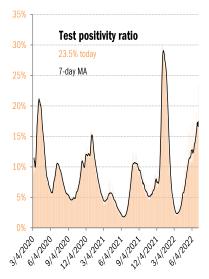


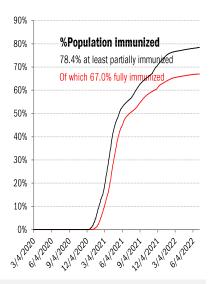




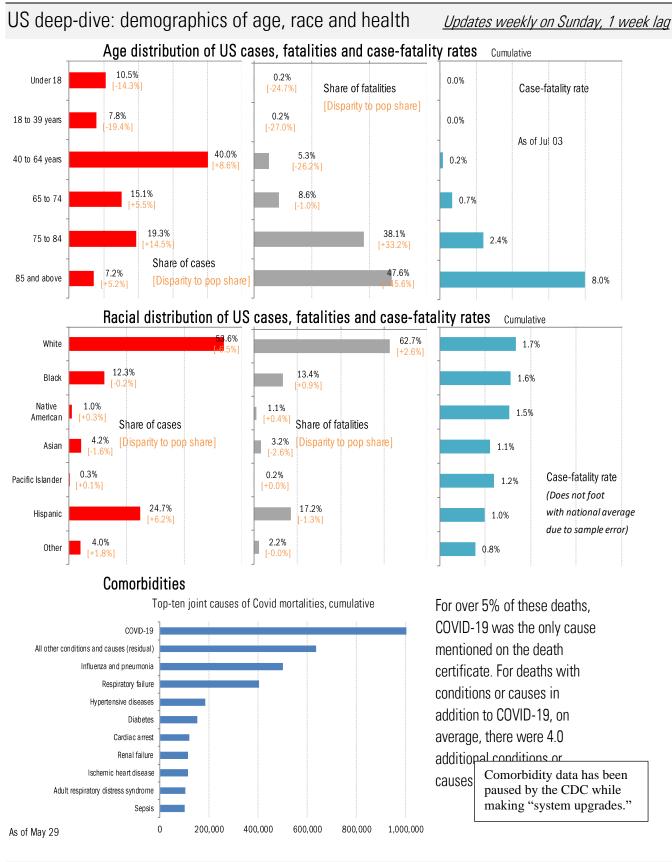








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

Recommended reading

Shinzo Abe, Japan's Long-Serving Prime Minister, Dies

<u>at 67</u>

Isabel Reynolds *Bloomberg* April 7, 2022

<u>Got COVID? Doctors warn powering through it — even</u> <u>from home — can worsen health toll</u> Emily Alpert Reyes

Los Angeles Times July 7, 2022

Why the Berenson v Twitter settlement may open

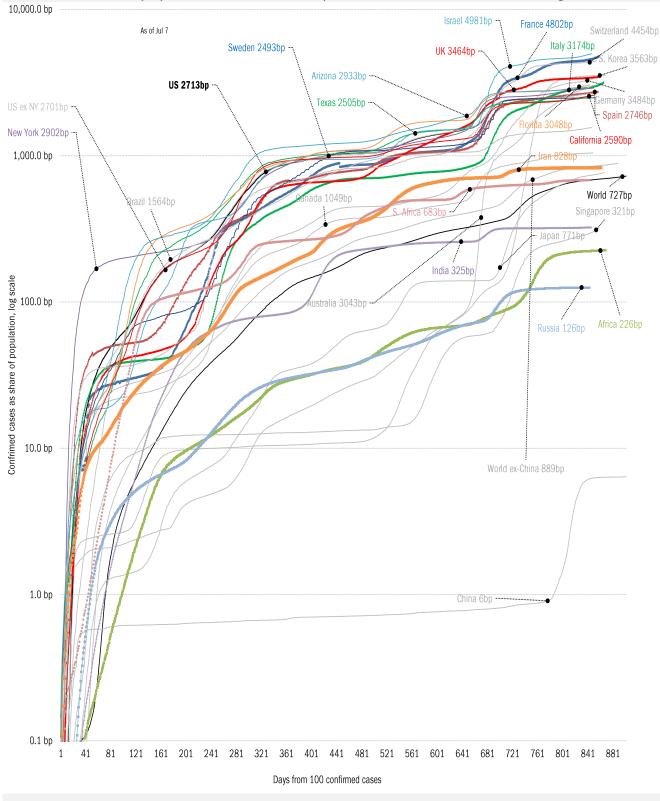
the door to claims from other banned users

Alex Berenson *Unreported Truths* July 7, 2022

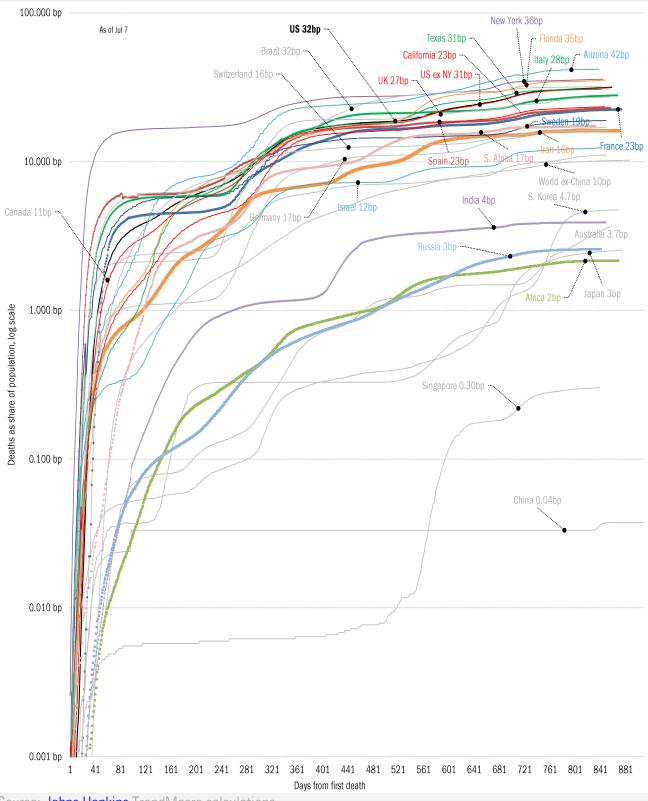
Meme of the day

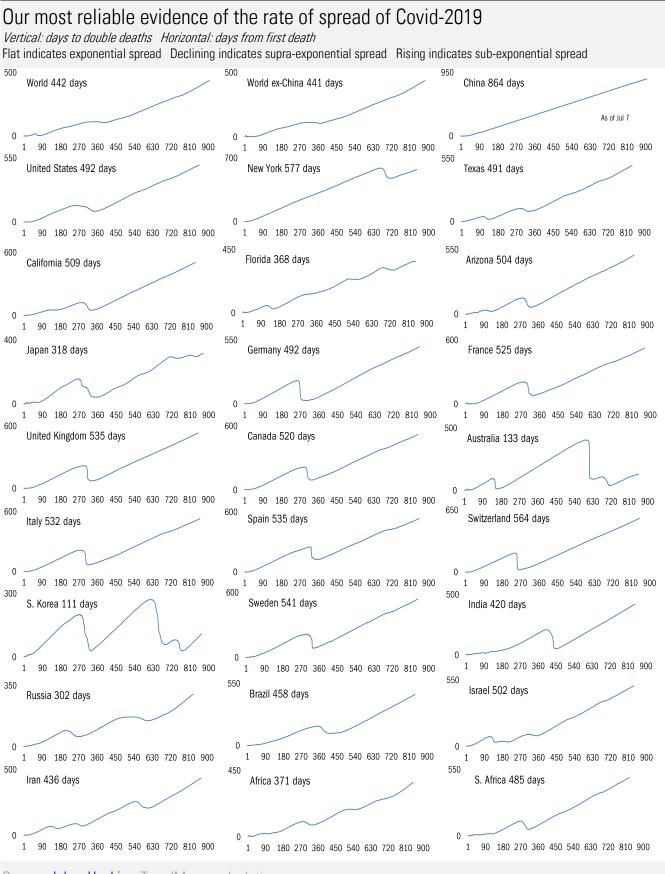
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

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



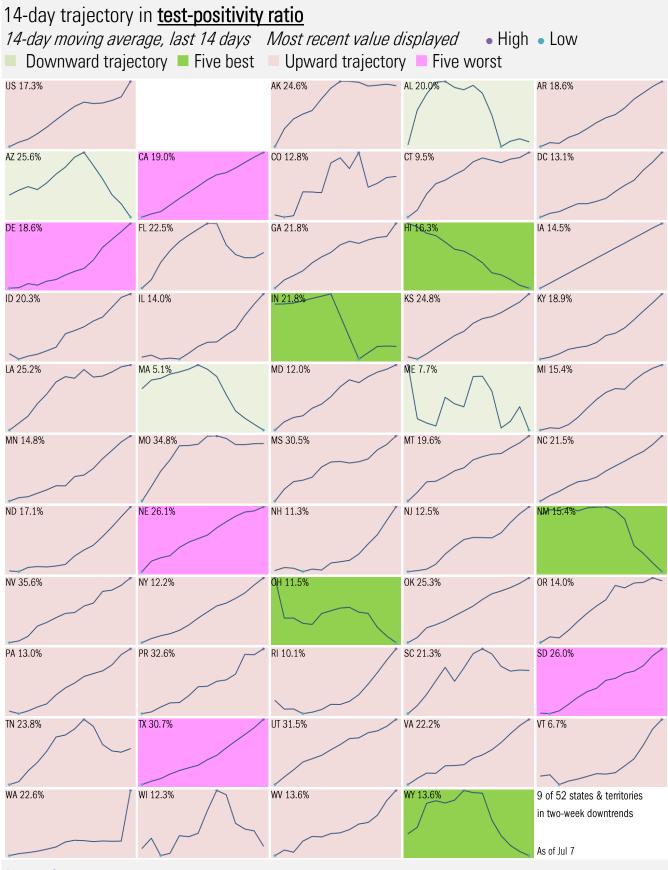
The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale*



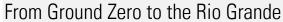




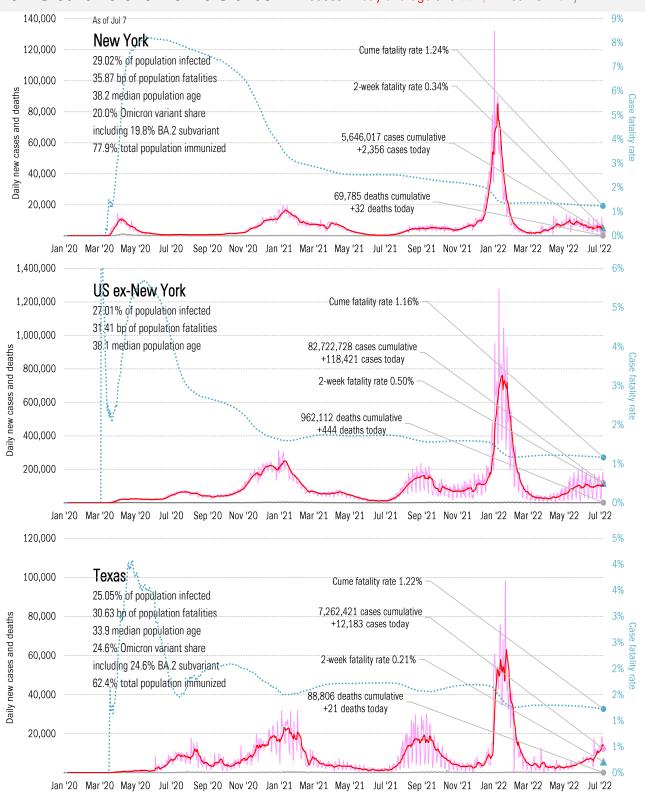
Source: Johns Hopkins, TrendMacro calculations



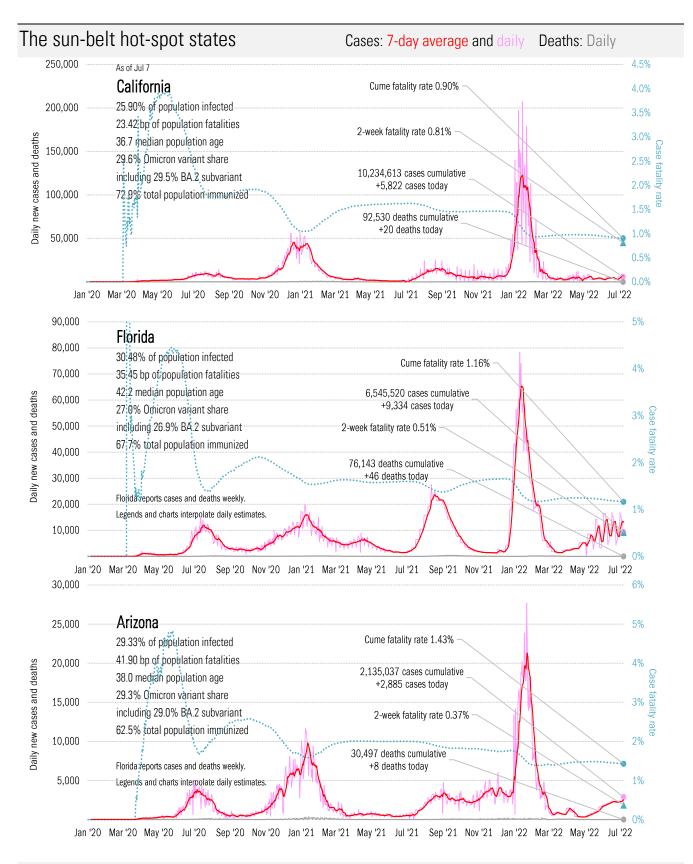
Source: Covid Act Now, TrendMacro calculations



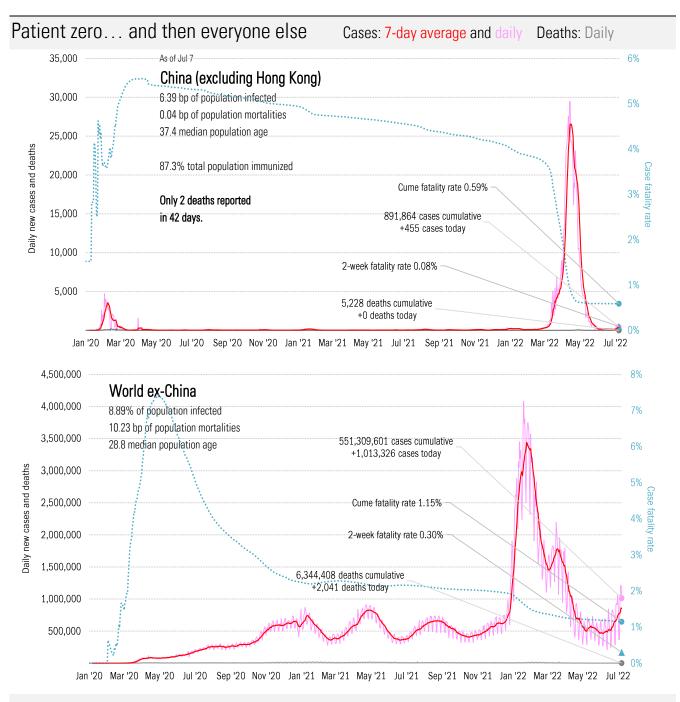
Cases: 7-day average and daily Deaths: Daily



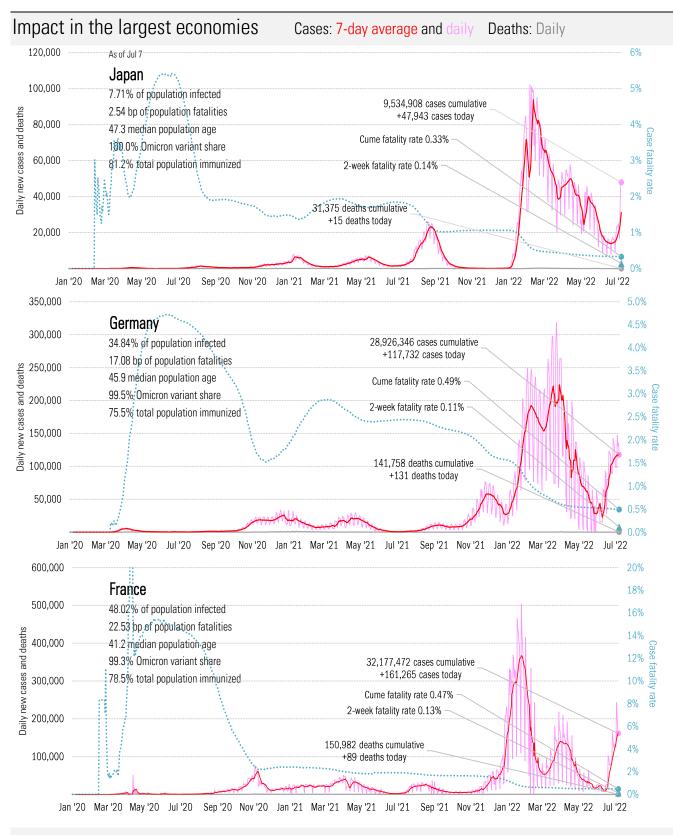
Source: Johns Hopkins, TrendMacro calculations



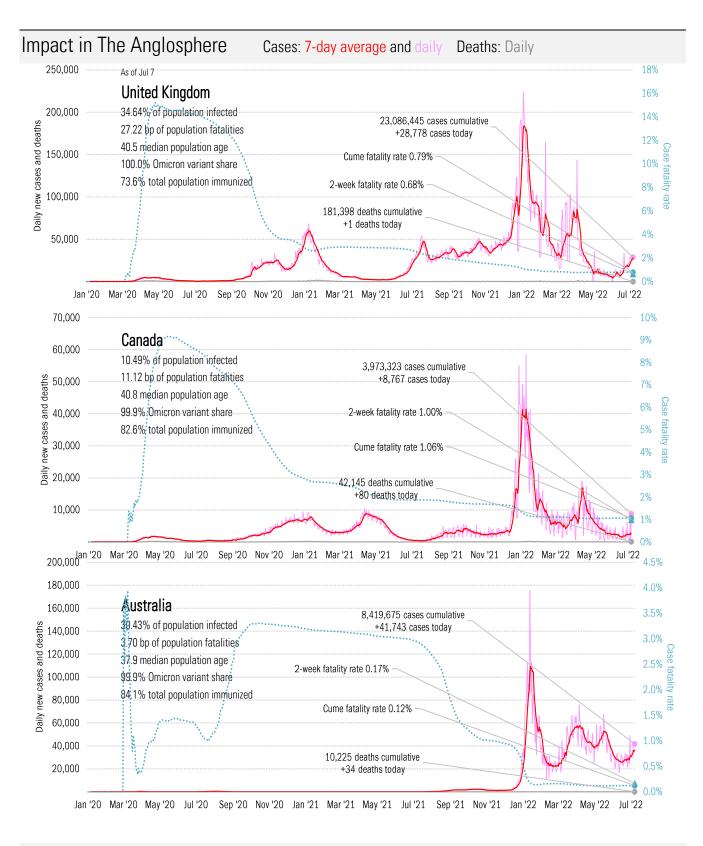
Source: Johns Hopkins, TrendMacro calculations

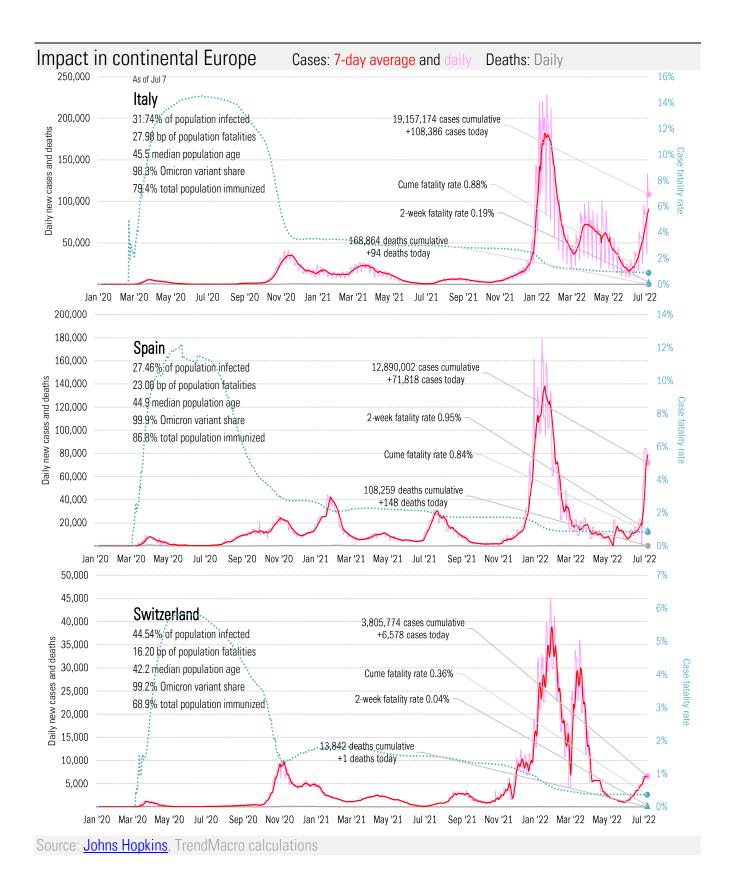


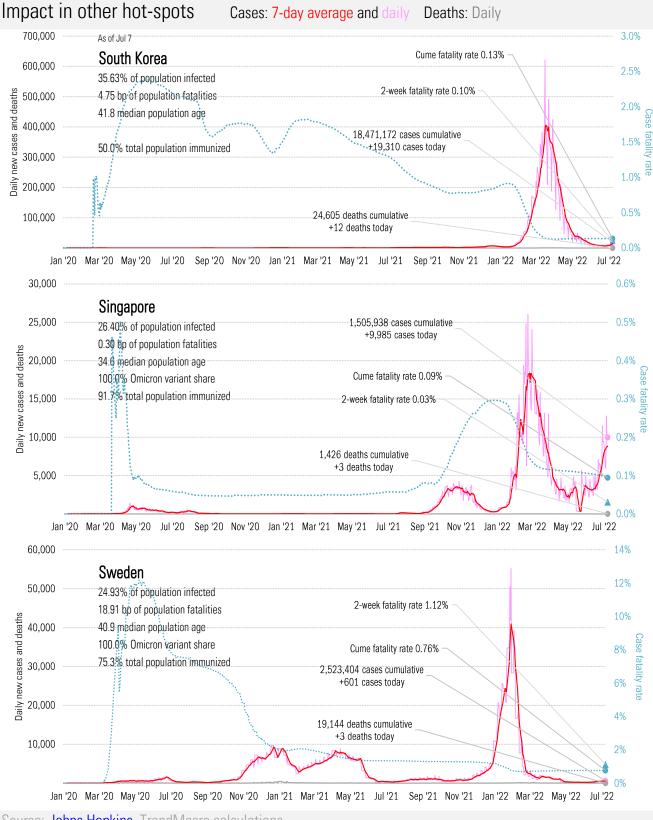
Source: Johns Hopkins, TrendMacro calculations



Source: Johns Hopkins, TrendMacro calculations



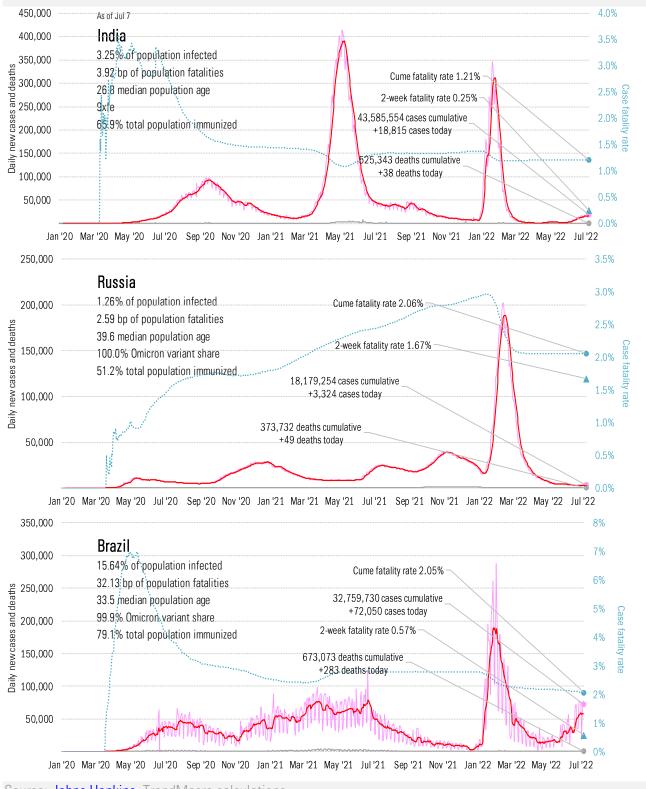




Source: Johns Hopkins, TrendMacro calculations

Impact in the BRICs ex-China Cases

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations

