

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

Asia

198,609

US/Mex/Can 120,672

Europe 113,613

45,396

Africa 44.190

Other Americas

Deaths: Daily

141, Sep Nov :

May :21

Data Insights: Covid-2019 Monitor

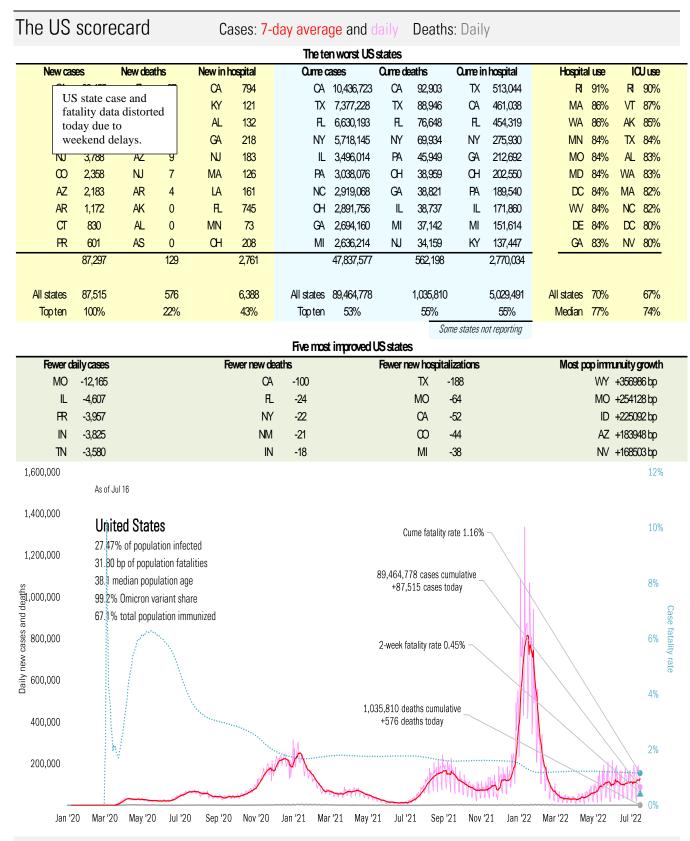
Sunday, July 17, 2022

The global scorecard Cases: 7-day average and daily The worst ten countries New cases New Deaths New confirmed cases United States 110,647 576 by continent Japan 91,384 205 Italy Brazil Line: 7-day moving aver United States 87,515 Italy 111 Dots and labels: most recent day Korea, South 40,342 Taiwan* 72 Brazil 40,149 Mexico 71 Australia 38,914 Chile 49 49 Mexico 31,173 India Taiwan* 25,266 Russia 40 India 20,528 Thailand 38 9,153 Quaternala 31 Singapore 495,071 1,242 Novino Mar 20 May .20 Jul .20 1817.20 Ser in 1817.27 Mar 27 World 584,246 World 1,455 Topten 85% Topten 85% 4,500,000 As of Jul 16 World 4,000,000 7.382% of population infected 3,500,000 Cume fatality rate 1.14% 8.39 bp of population fatalities

8% 7% 6% 3,000,000 support 2,500,000 2,000,000 1,500,000 1,500,000 30.6 median population age 560,595,395 cases cumulative 5% Case +584,246 cases today 2-week fatality rate 0.28% 4% tata 6,371,317 deaths cumulative 3% rate +1,455 deaths today 2% 1,000,000 500,000 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 May '22 Jul '22 Source: Johns Hopkins, TrendMacro calculations

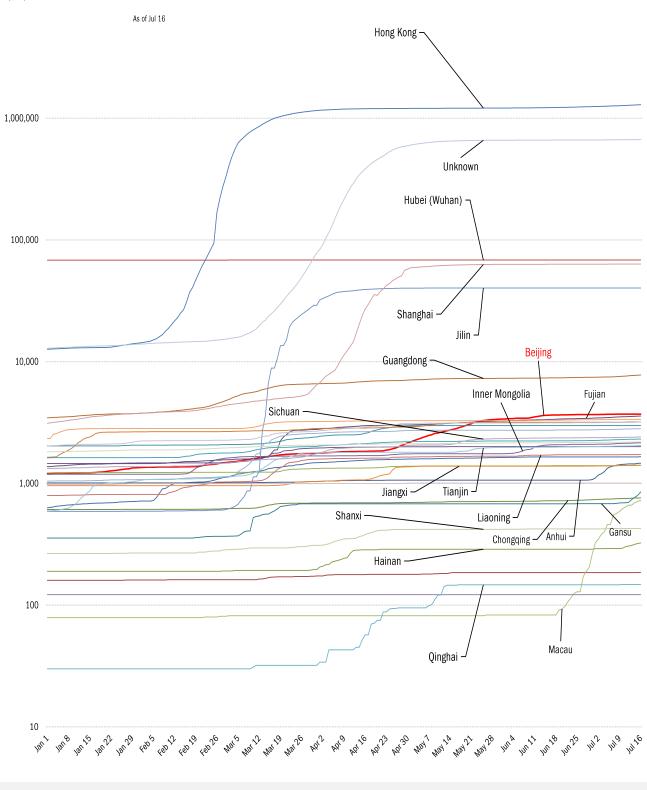
For more information contact us: Donald Luskin: 214 550 2121 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 <u>tdemas@trendmacro.com</u>

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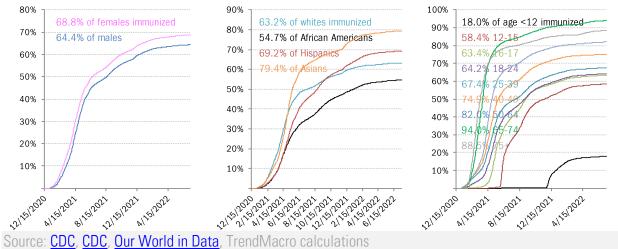
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

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

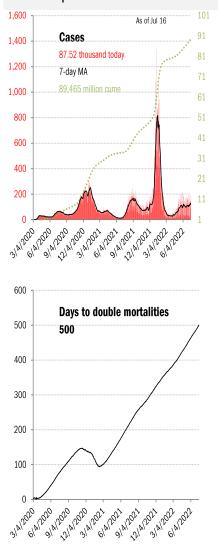


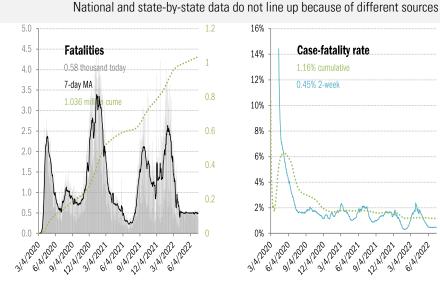
				the US and the world			iu	Today		Updates weekly on P		
Administered		Cumulative							nay million	Immunity US	Full 67.1%	Partial 78.5%
Doses		614,375,071								US UK	74.7%	78.5% 79.7%
of which boosters		109,001,813		% Pop Immune		0/	+0.059 million New immune today					
Total nonvestion		One dose					% pop 69%			-	78.5%	80.8%
Total population		268,744,531		80%		228,983,309		+0.035 million		Spain	85.5%	86.9%
Age 12 to 17		17,986,428		71%		15,385,626		+0.003 million		Germany	76.0%	77.6%
Age 18 to 64		180,059,671		89%		152,815,245		+0.019 million		ltaly	81.0%	85.8%
Age 65 and over		59,481,476		100%	5	2,022,449	95%	+0.007	million	Australia	83.7%	86.3%
AK										Israel	66.2%	72.3%
										Canada	82.5%	85.9%
		State		Best						Japan	82.2%	83.3%
										Africa	20.3%	25.8%
		At least partial immunity		Midd	ام					India	65.7%	72.4%
		as % population		WIGO	10					Brazil	79.1%	86.3%
		Full immunity		Wors						China	88.5%	90.9%
		as % population		vv or:	st					Global data diff	ers due to sou	rces, timing
		"Immunity" - two doses				WI		As of Jul 14			ME	
				72.6% 66.2%					92.3%			
									80.7%			
Γ	WA	ID	MT	ND	MN	IL	MI	7	NY	VT	NH	Ī
	82.0%	62.4%	66.0%	66.4%	76.0%	76.5%	67.6%		91.3%	95.0%	89.8%	
	73.1%	55.9%	57.4%	56.2%	69.8%	69.2%	60.7%		77.9%	82.1%	71.7%	
	OR	NV	WY	SD	IA	IN	ОН	PA	NJ	MA		•
	78.8%	76.3%	58.8%	78.0%	68.6%	62.7%	63.9%	86.4%	91.6%	95.0%		
	70.3%	61.5%	51.5%	62.8%	62.5%	56.5%	58.9%	69.8%	76.6%	80.1%		
ſ	CA	UT	CO	NE	M0	KY	WV	VA	MD	СТ	RI	Ī
	83.3%	72.9%	80.5%	71.1%	67.0%	66.9%	65.7%	86.9%	87.9%	95.0%	95.0%	
	73.0%	64.9%	71.0%	64.2%	56.8%	58.0%	58.2%	73.9%	76.6%	80.2%	84.0%	
•		AZ	NM	KS	AR	TN	NC	SC	DC	DE		
		74.5%	89.4%	73.4%	67.6%	62.8%	86.2%	68.6%	95.0%	84.5%		
		62.5%	72.1%	62.7%	55.1%	55.0%	62.7%	57.8%	76.6%	70.3%		
		02.070	72.170	OK	LA	MS	AL	GA	70.070	10.070		
			72.0%	61.7%	60.3%	63.4%	66.2%					
HI 88.8%				58.1%	54.0%	52.5%	51.7%	55.5%				
				TX	0 4 .070	02.070	01.7 /0	00.070	FL	1 Г	PR	I
79.3%				74.6%					80.3%		95.0%	
10.070				62.4%					67.7%		83.7%	
				02.4%					07.7%	J	0J./%	l

The demographics of US vaccination

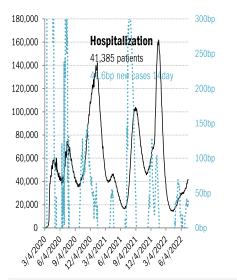


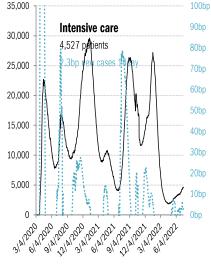
US deep-dive

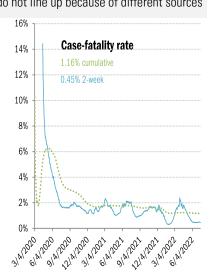


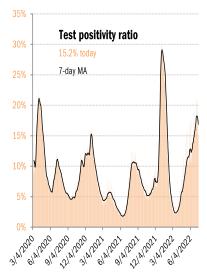


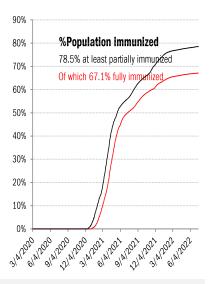




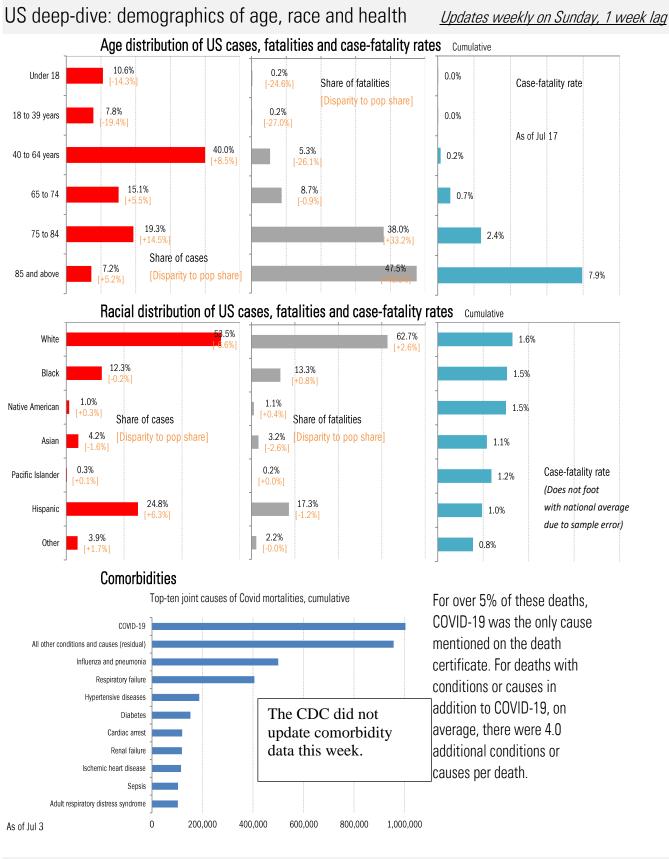








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

Recommended reading

BREAKING - FORCED TO SUE NATIONAL INSTITUTES

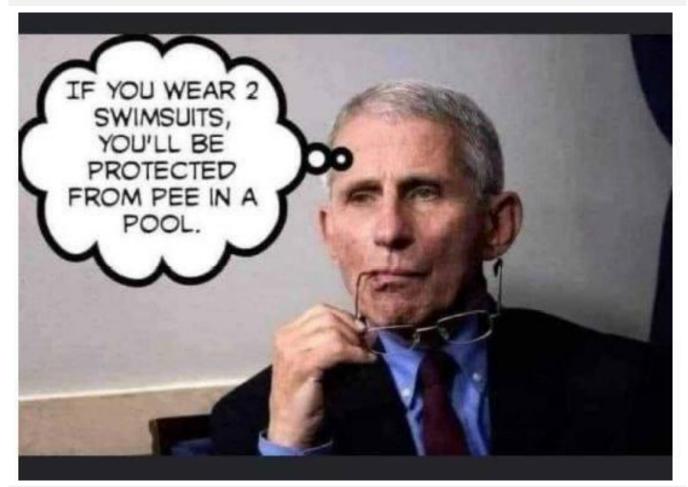
OF HEALTH ... AGAIN!

Adam Andrzejewski *Open The Books* July 16, 2022

We need to talk about Australia

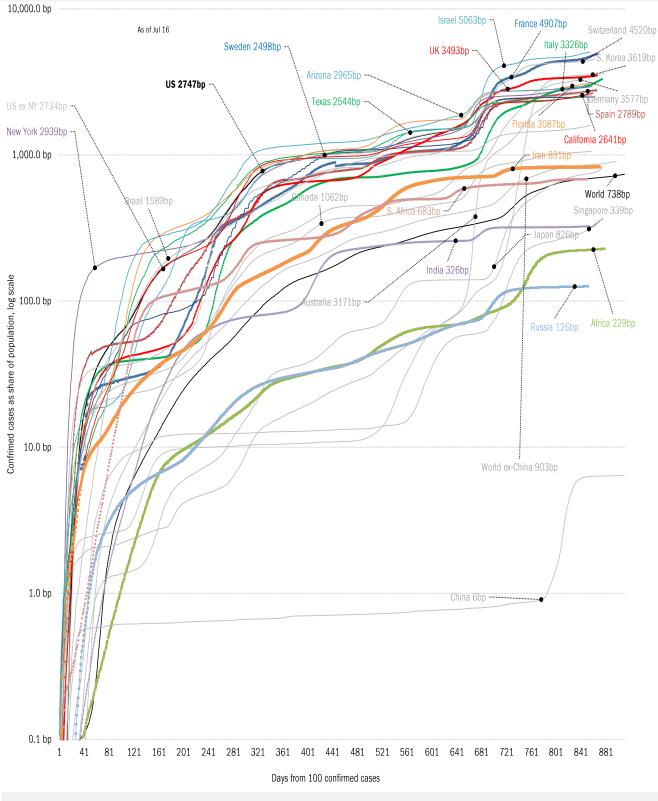
Alex Berenson *Unreported Truths* July 16, 2022

Meme of the day

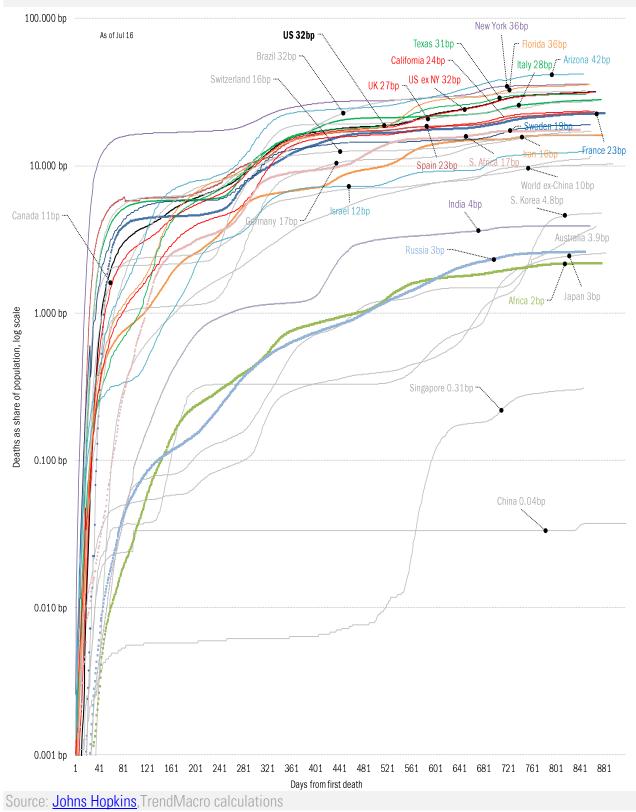


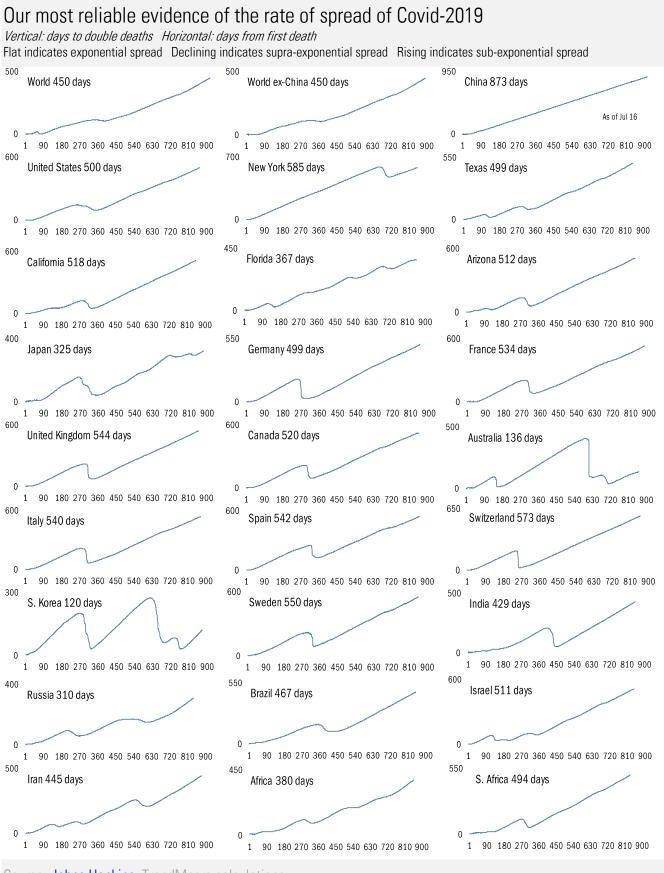
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

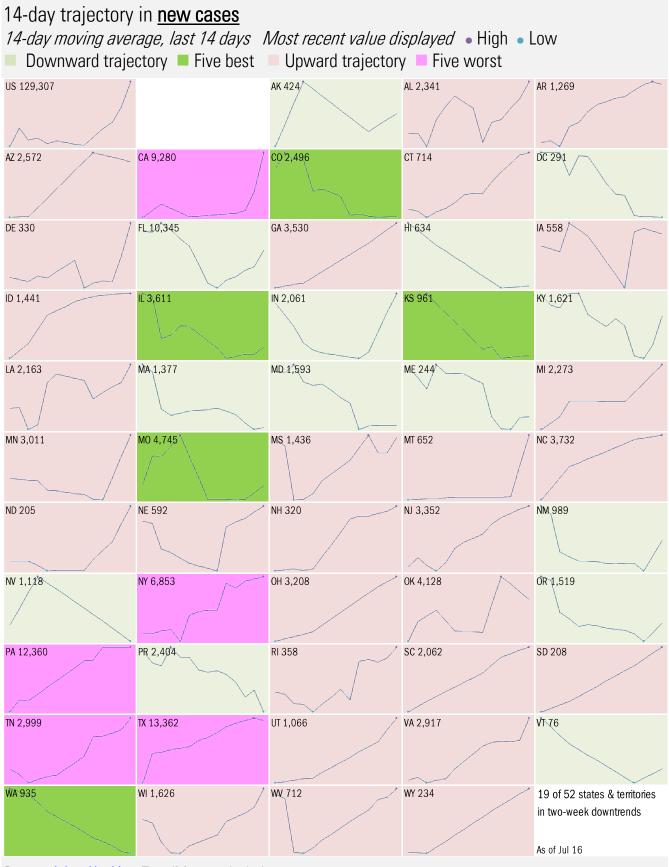
The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves *Share of infected population from first day with 100 confirmed cases, log scale*



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





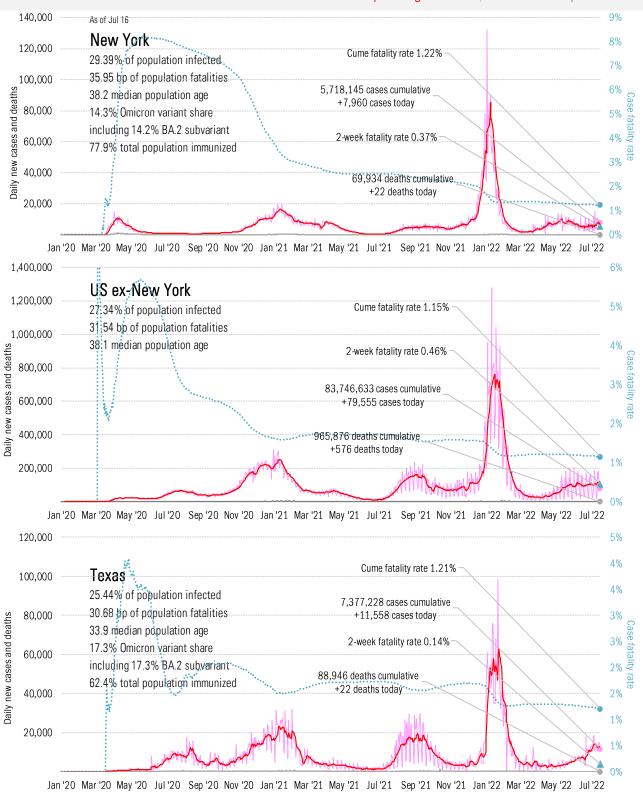




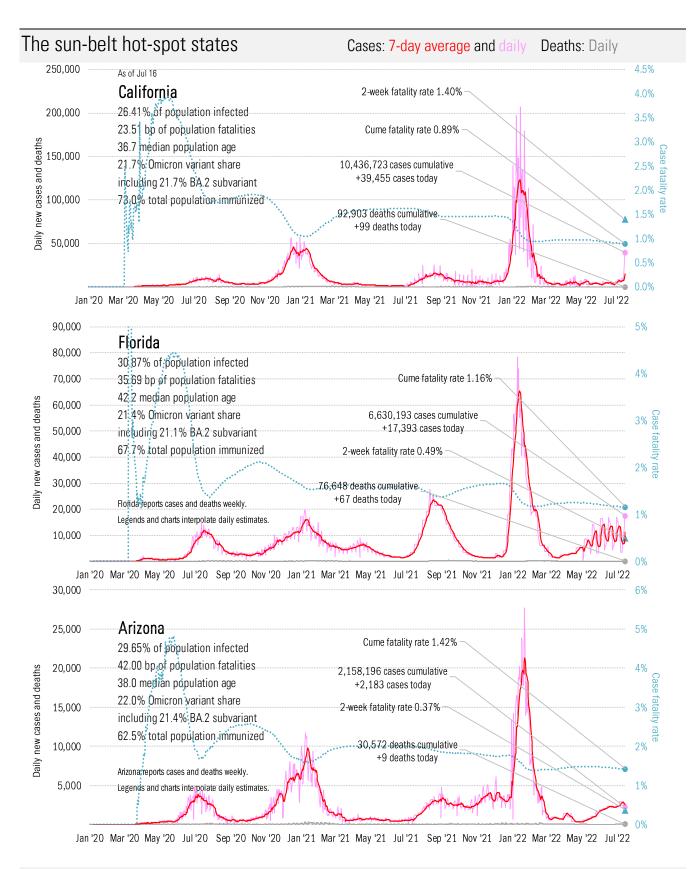
Source: Covid Act Now, TrendMacro calculations

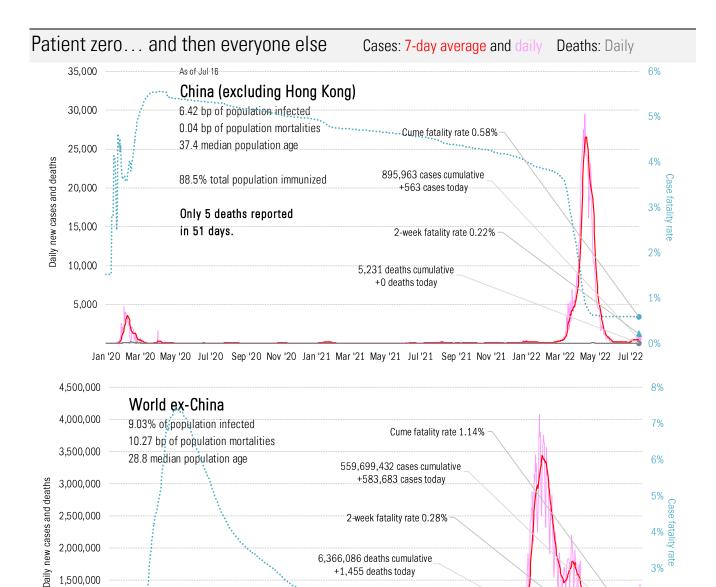
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations





+1,455 deaths today

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 May '22 Jul '22

Source: Johns Hopkins, TrendMacro calculations

1,500,000

1,000,000

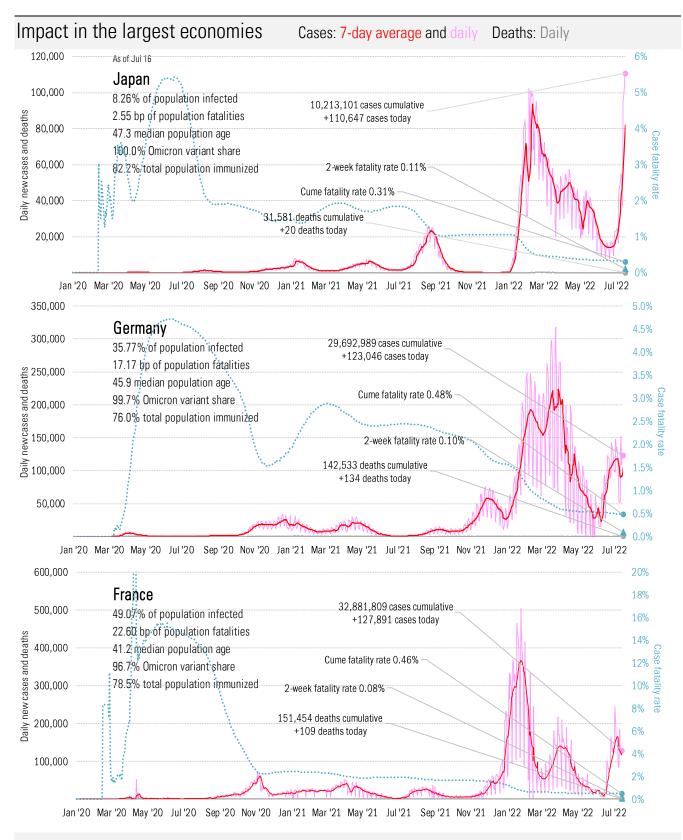
500,000

3%

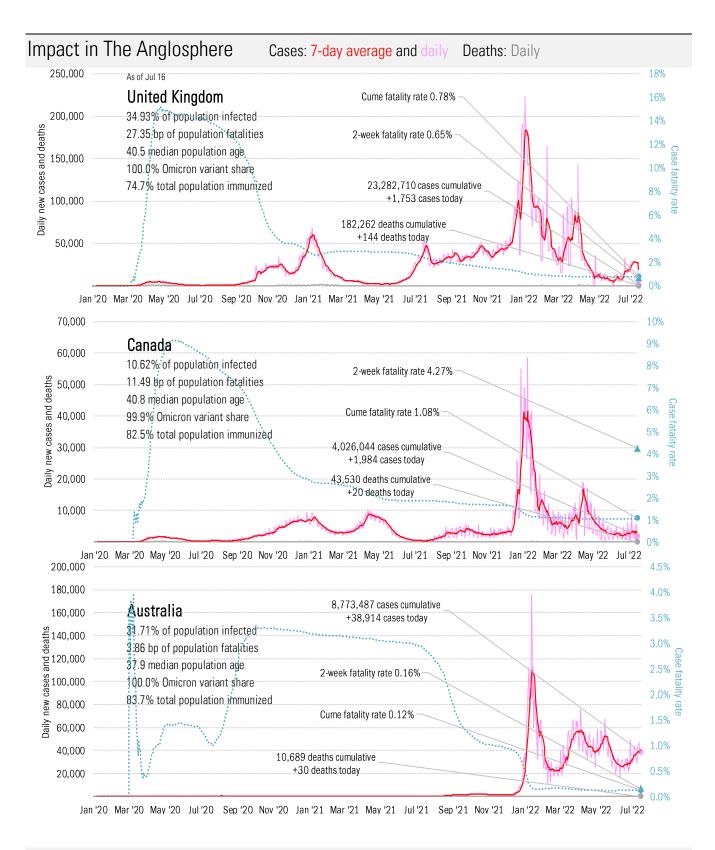
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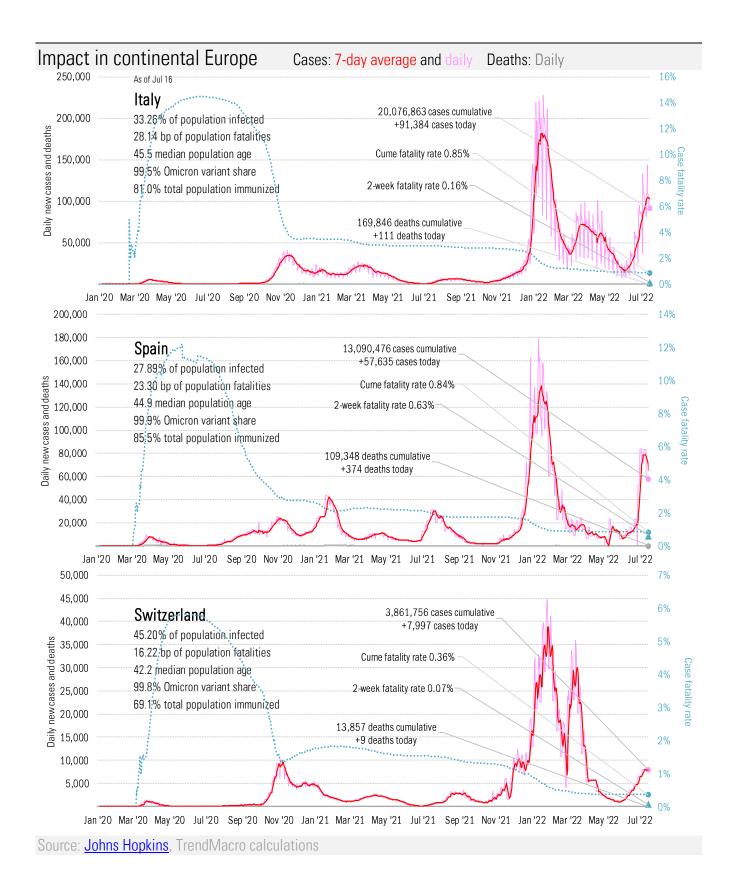
1%

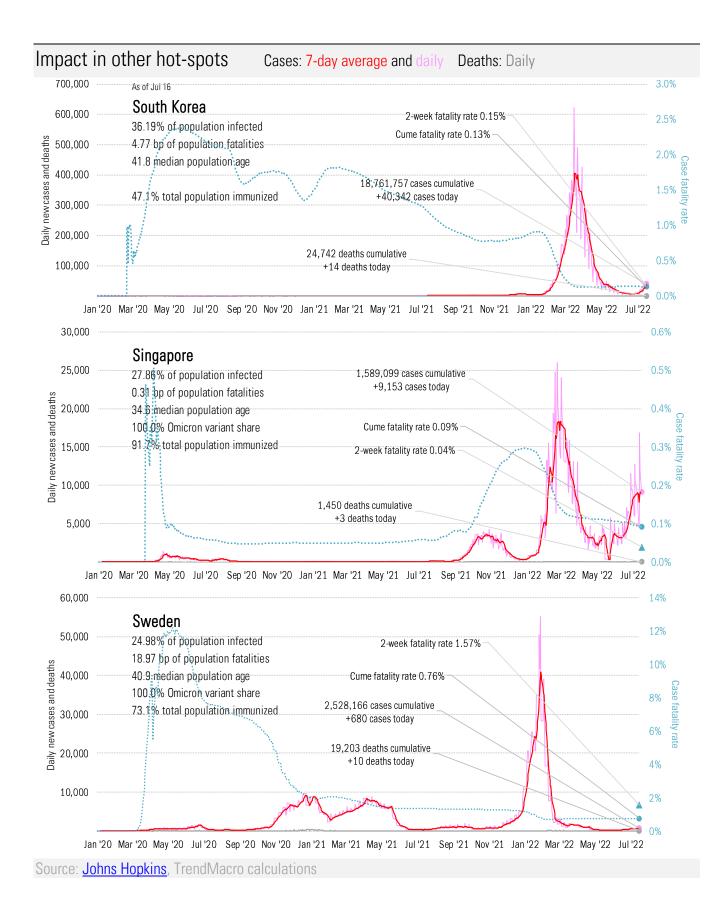
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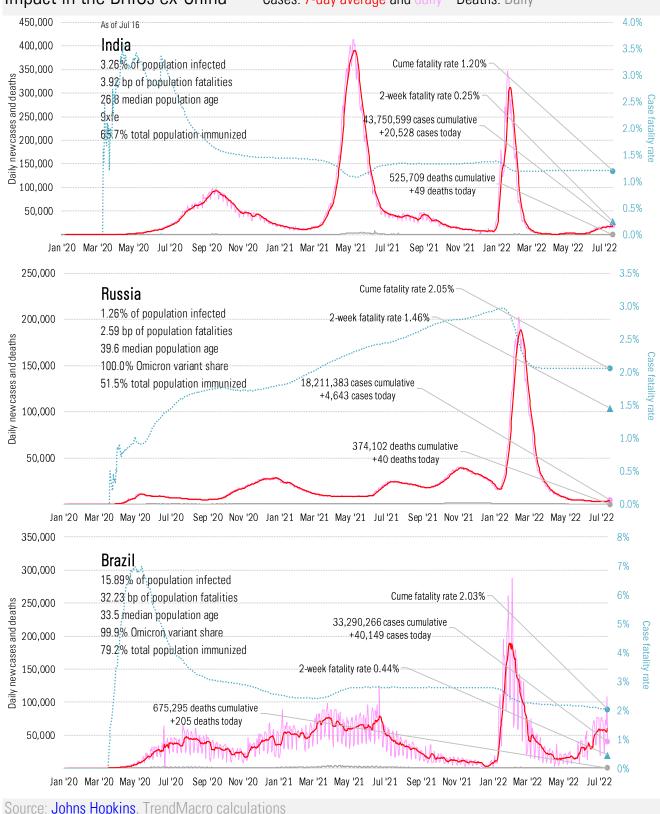
Source: Johns Hopkins, TrendMacro calculations

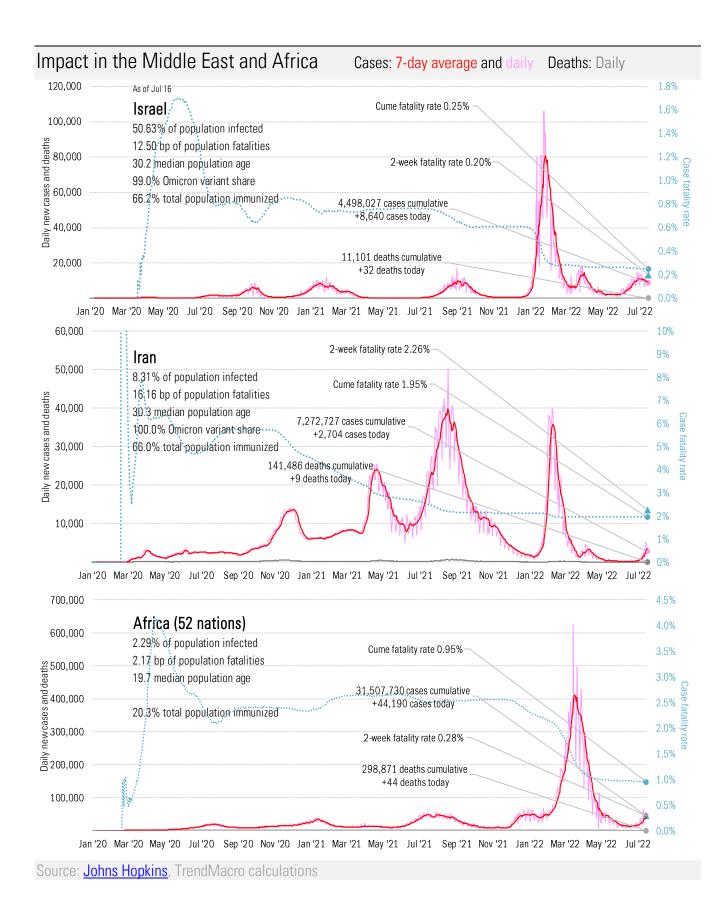


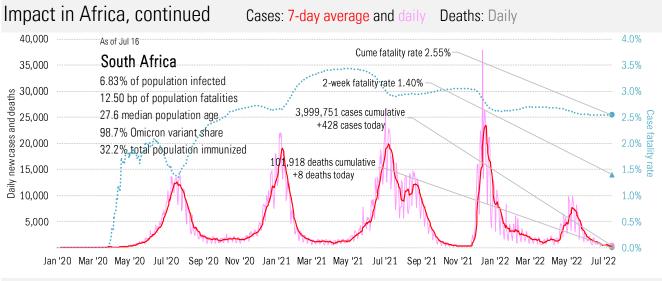




Impact in the BRICs ex-China Cases: 7-day average and daily Deaths: Daily







Source: Johns Hopkins, TrendMacro calculations