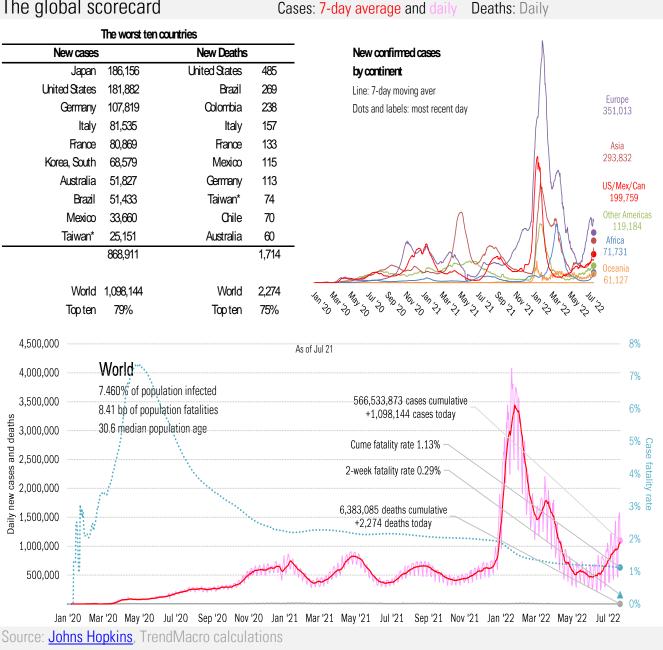


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

Data Insights: Covid-2019 Monitor

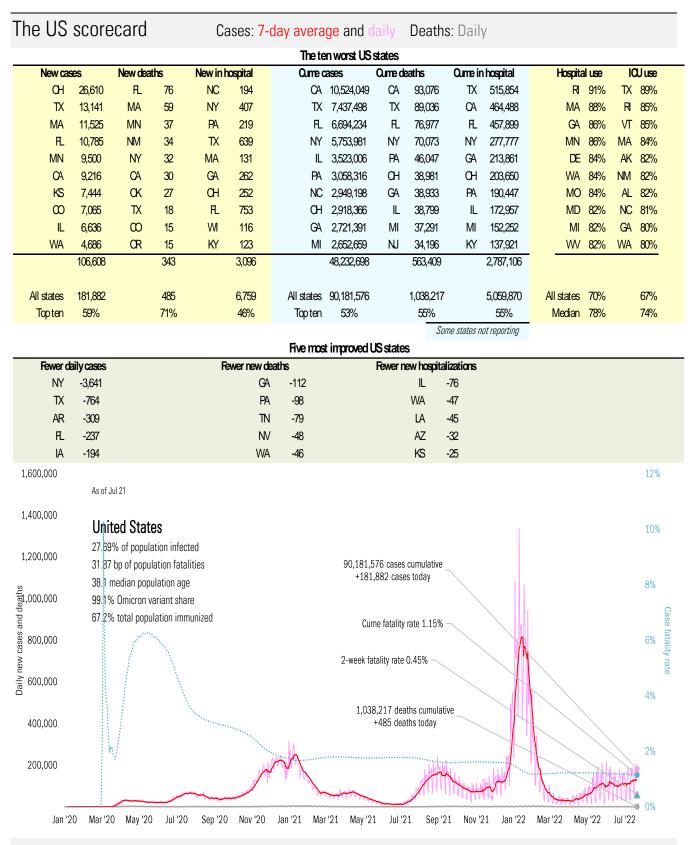
Friday, July 22, 2022

The global scorecard



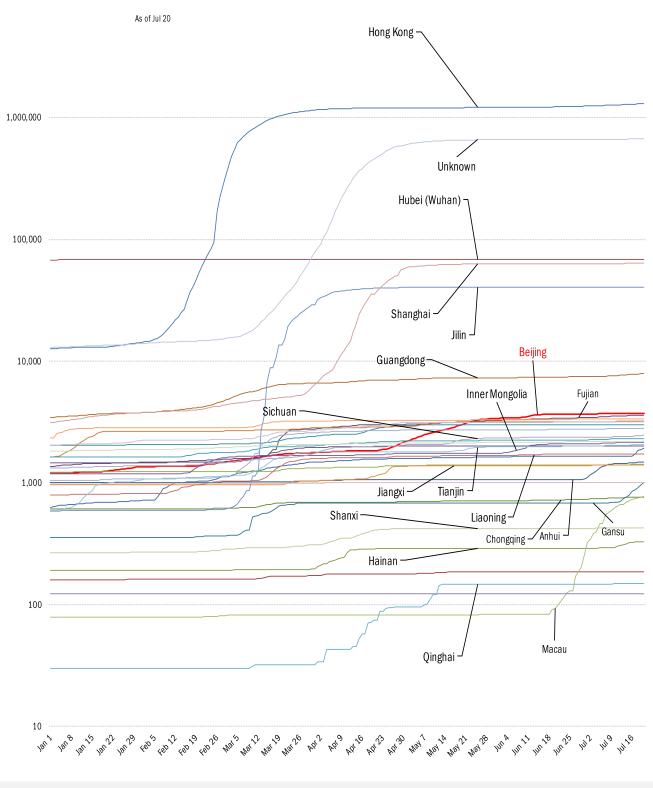
For more information contact us: Donald Luskin: 214 550 2121 don@trendmacro.com Thomas Demas: 704 552 3625 tdemas@trendmacro.com

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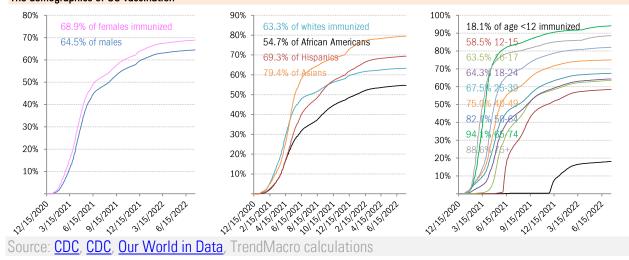


Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

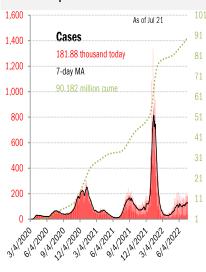
China provincial coronavirus <u>case</u> accelerometer... tracking the "zero Covid" curves *Cumulative reported cases this year, log scale: flat line indicates "zero Covid"*

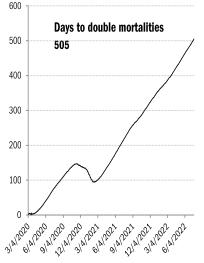


dministered oses of which boosters		nauvo		the US and the world				Today			
of which boosters	0	Cumulative 616,635,212						million	Immunity US	Full 67.2%	Partial 78.7%
	1	109,477,330						million	UK	74.8%	79.8%
A. 1		One dose		Imn	Immune		% pop New immun		France	78.6%	80.8%
Total population 269,233,447		% Pop Immune 81% 229,268,362			69%	+0.041 million		Spain	85.5%	86.9%	
ge 12 to 17 18,017,753				15,409,473	61%		million	Germany	76.0%	77.6%	
ge 18 to 64 180,243,678				52,968,762	75%	+0.022 million		ltaly	81.0%	85.8%	
Age 65 and over 59,543,060				52,083,438	95%	+0.009 million		Australia	83.8%	86.3%	
1%1									Israel	66.2%	72.3%
3%									Canada	82.5%	86.0%
		01.1							Japan	82.2%	83.3%
1oderna	St	State							Africa	20.3%	25.9%
38% At lea		t least partial immunity							India	65.9%	72.4%
Pfizer 59%	as % po	as % population		le					Brazil	79.2%	86.3%
5370	Full im	Full immunity							China	88.7%	91.0%
AK	as % po	as % population		Worst					Global data differs due to sources, timing		
71.0%	"Immunity" = tw	"Immunity" = two doses		WI			As of Jul 21		ſ	ME	
62.9%					72.7%					92.4%	
					66.3%					80.8%	
WA	ID	MT	ND	MN	IL	MI	1	NY	VT	NH	
82.20	62.6%	66.0%	66.5%	76.1%	76.7%	67.6%		91.4%	95.0%	90.0%	
73.20	6 56.0%	57.4%	56.2%	69.9%	69.2%	60.7%		78.0%	82.2%	71.8%	
OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		-
78.90	6 76.5%	58.9%	78.1%	68.7%	62.8%	64.0%	86.7%	91.8%	95.0%		
70.40	61.6%	51.5%	62.8%	62.6%	56.6%	59.0%	69.9%	76.7%	80.2%		_
CA	UT	CO	NE	MO	KY	WV	VA	MD	CT	RI	
83.40	6 73.1%	80.7%	71.1%	67.1%	67.0%	65.8%	87.2%	88.1%	95.0%	95.0%	
73.00		71.0%	64.2%	56.9%	58.0%	58.3%	74.0%	76.7%	80.3%	84.1%	
	AZ	NM	KS	AR	TN	NC	SC	DC	DE		
	74.7%	89.6%	73.5%	67.6%	62.9%	86.4%	68.7%	95.0%	84.6%		
	62.6%	72.3%	62.8%	55.2%	55.1%	62.9%	57.9%	76.9%	70.3%		
			OK	LA	MS	AL	GA				
			72.2%	61.7%	60.4%	63.5%	66.3%				
HI			58.2%	54.1%	52.5%	51.8%	55.6%			_	
89.0%			TX					FL		PR	
79.3%			74.8%					80.4%		95.0%	
			62.5%					67.8%		83.7%	



US deep-dive





180,000

160.000

140,000

120,000

100,000

80,000

60.000

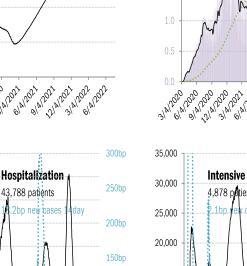
40,000

20,000

0

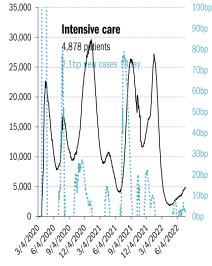
31412020 61412020

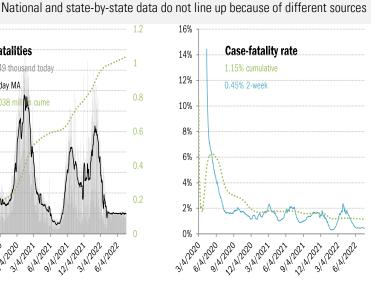
91412020 12/4/2020

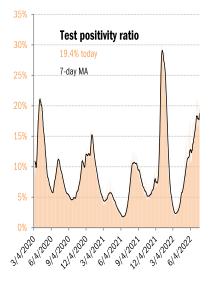


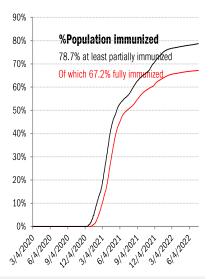












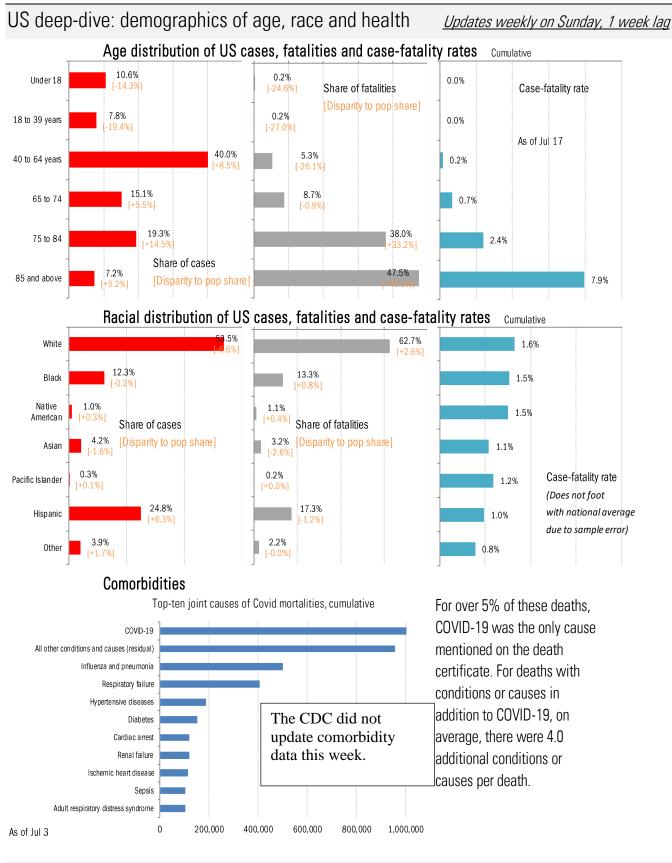
Source: Johns Hopkins, Covid Act Now, TrendMacro calculations

50bp

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1....

3/4/2021 .' 61A12021 · 9/A/2021 121412021 ···· 3/4/2022 6/4/2022



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

Recommended reading

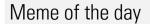
What to know about Paxlovid, the COVID drug President Biden is using to speed recovery Bill Chappell *NPR* July 21, 2022

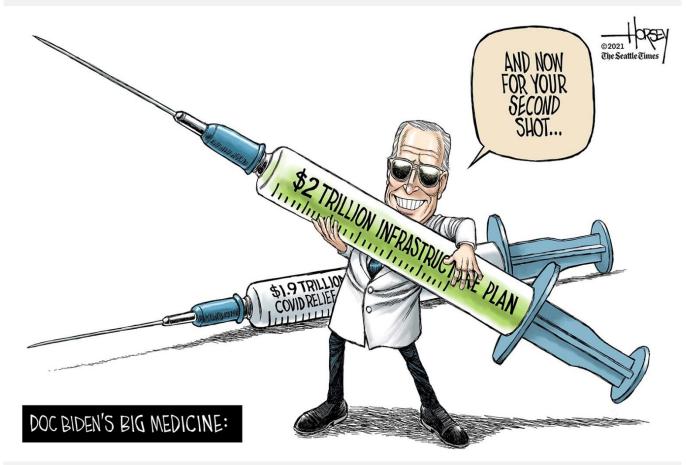
Biden had received a second booster. Here's why it wasn't enough to prevent infection.

Apoorva Mandavilli *New York Times* July 21, 2022

President Biden Tests Positive for Covid-19

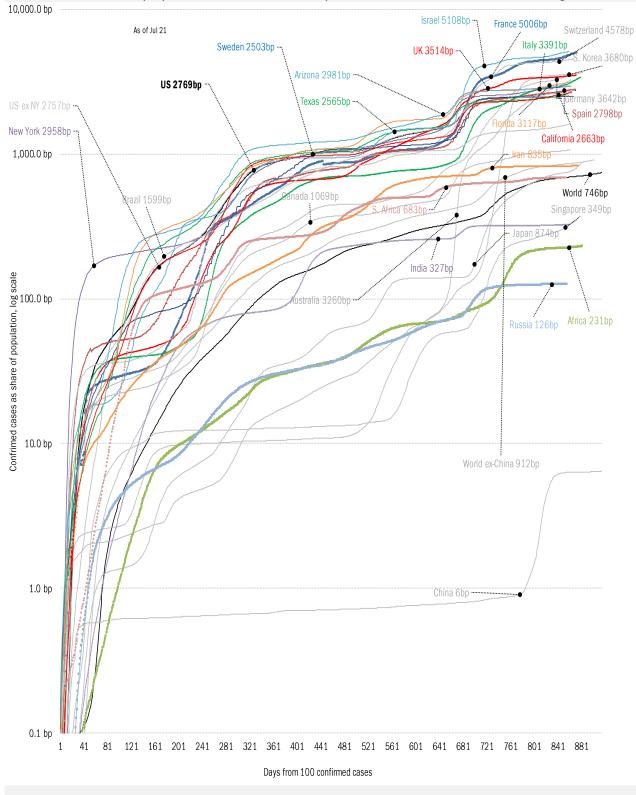
Catherine Lucey, Ken Thomas and Andrew Restuccia *Wall Street Journal* July 21, 2022



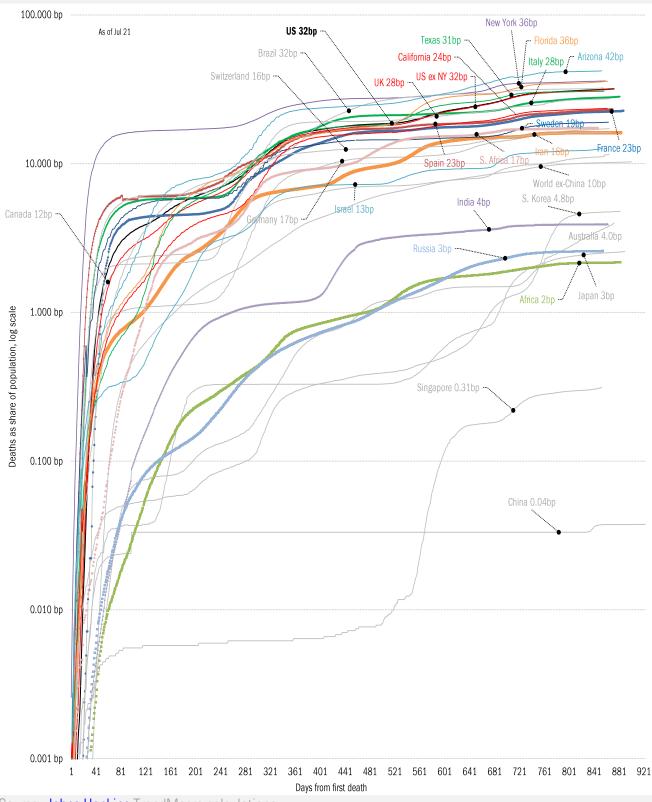


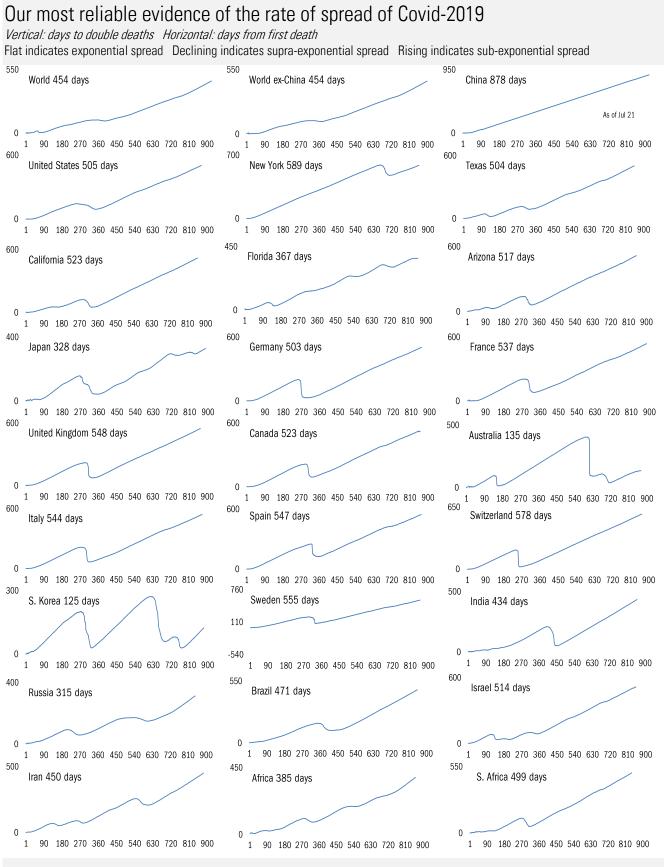
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

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

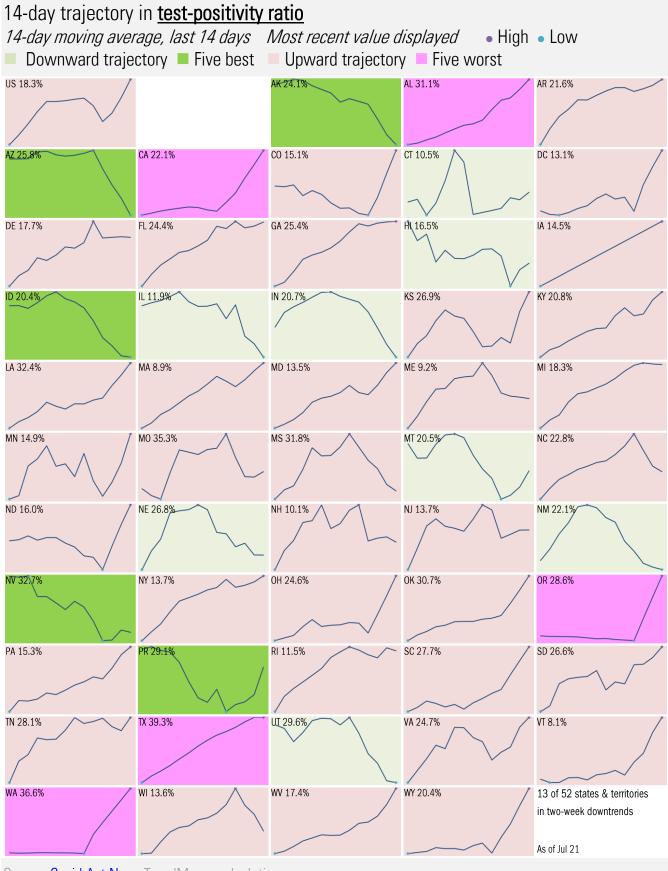


The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale*





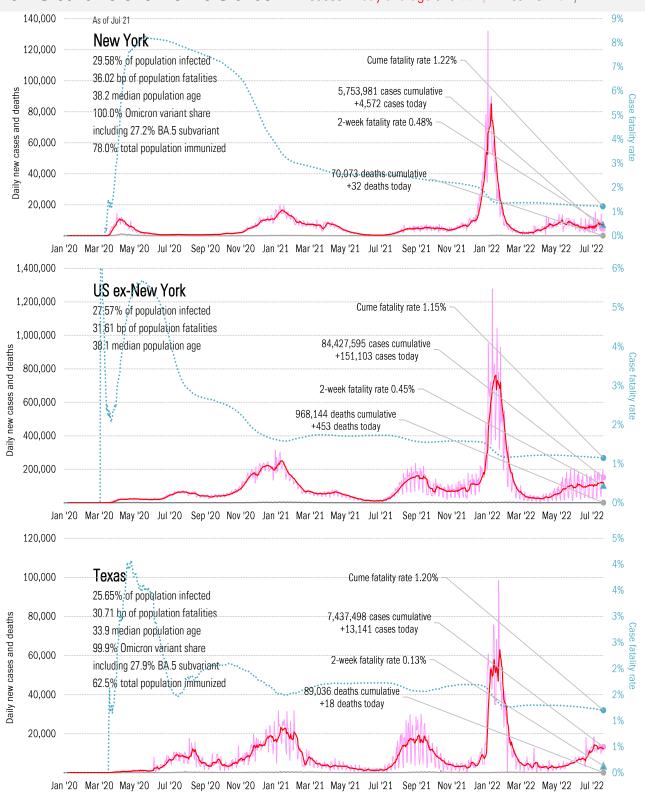




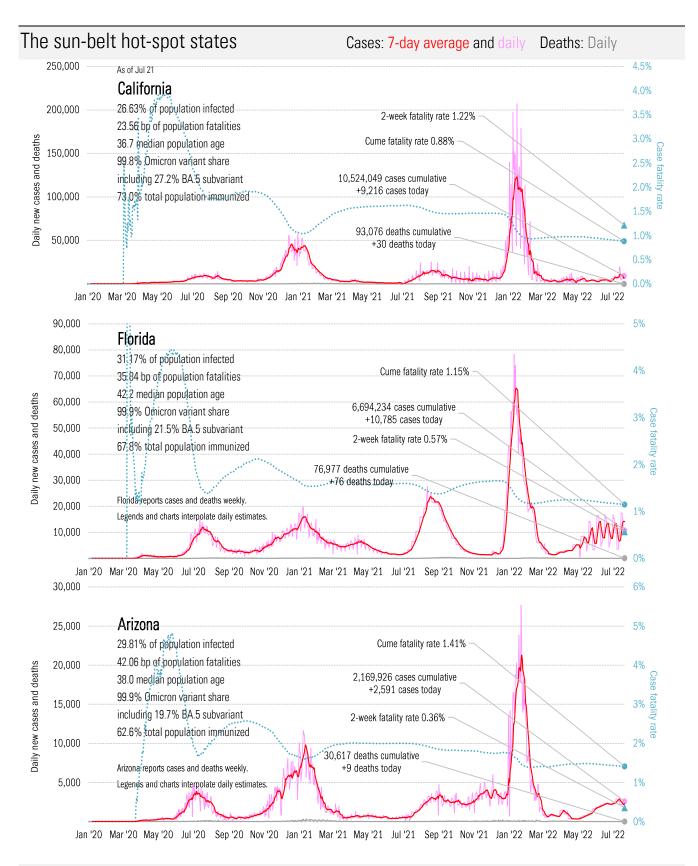
Source: Covid Act Now, TrendMacro calculations

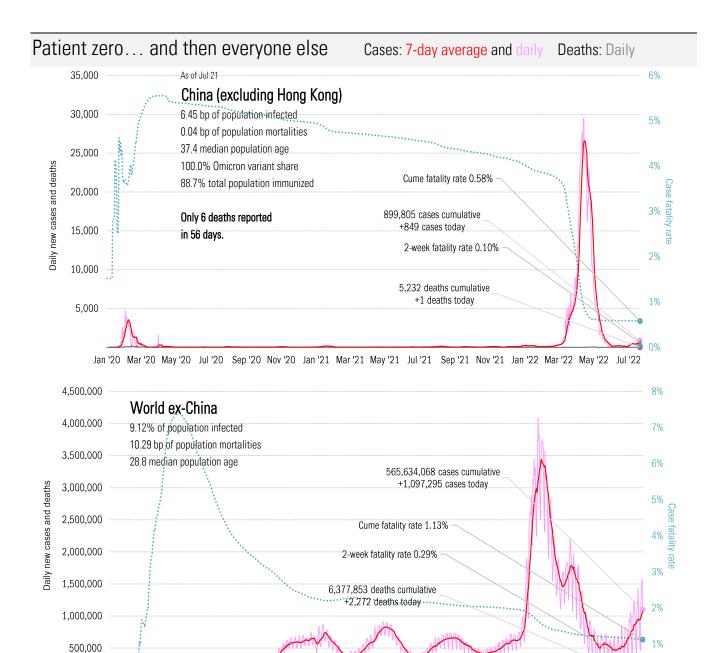
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations

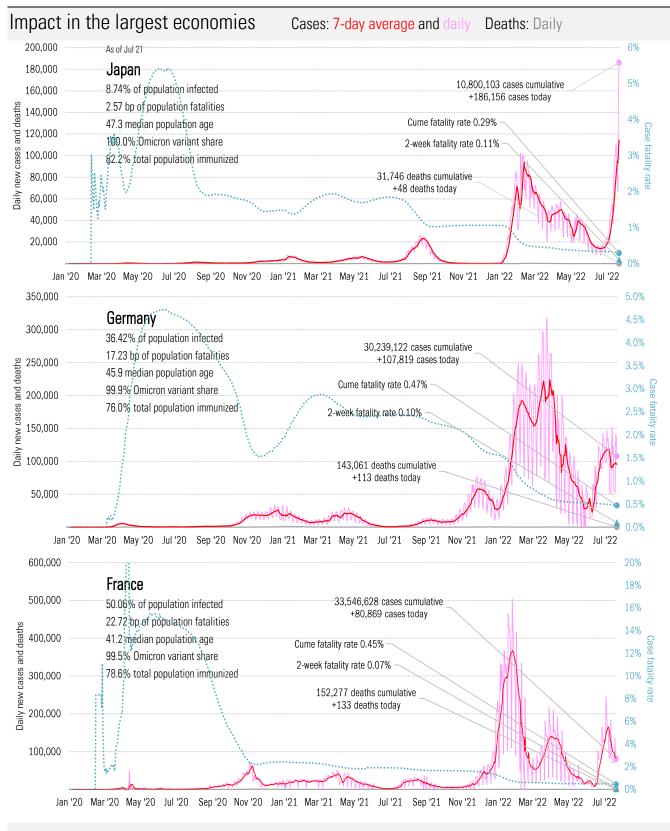




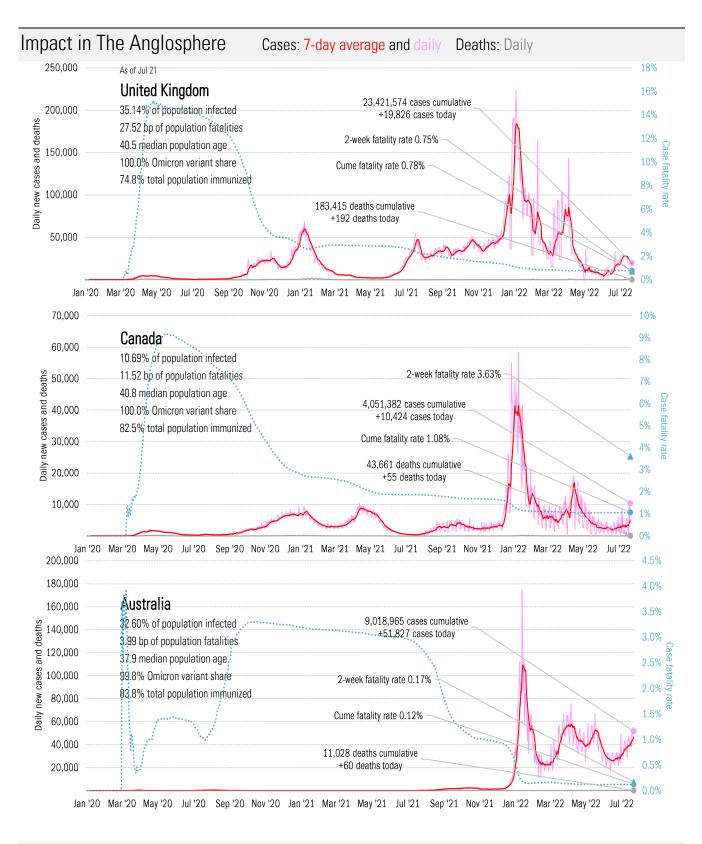
Jan '20 Mar '20 May '20 Jul '20 Sep '20 Nov '20 Jan '21 Mar '21 May '21 Jul '21 Sep '21 Nov '21 Jan '22 Mar '22 May '22 Jul '22

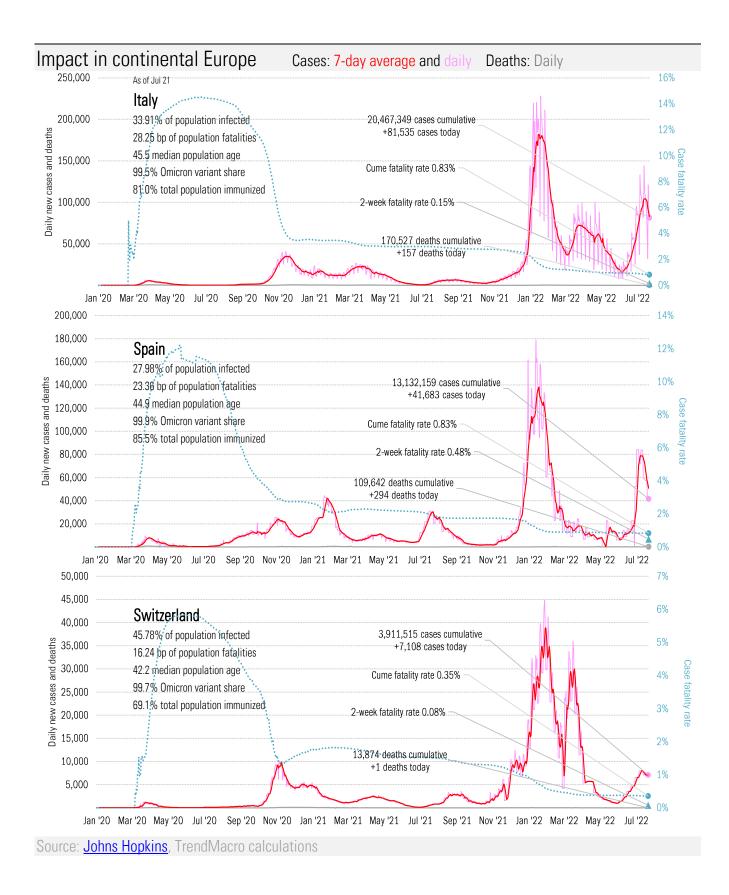
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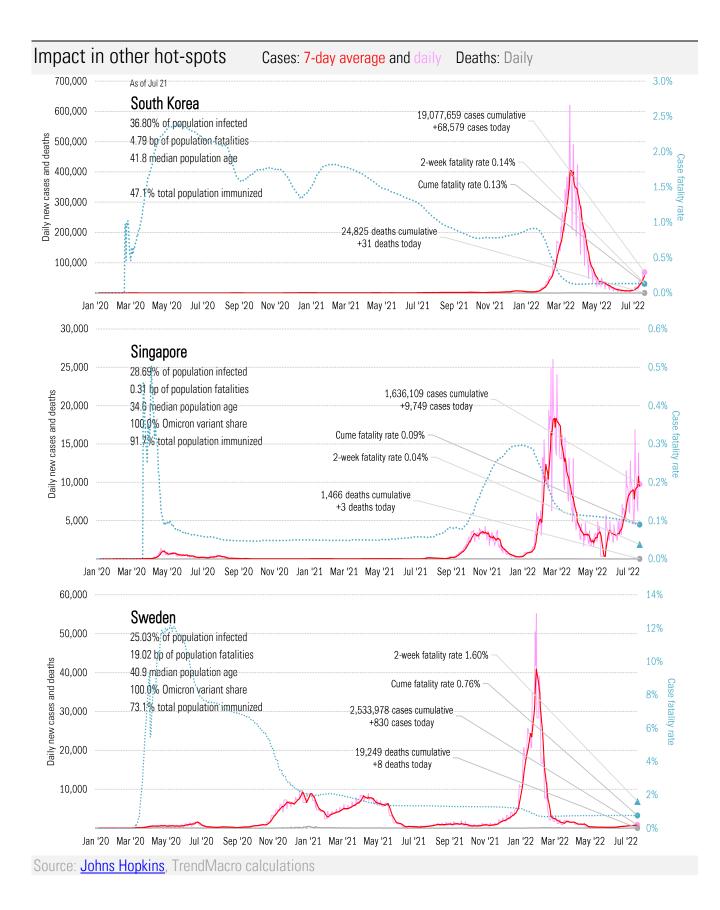
Source: Johns Hopkins, TrendMacro calculations



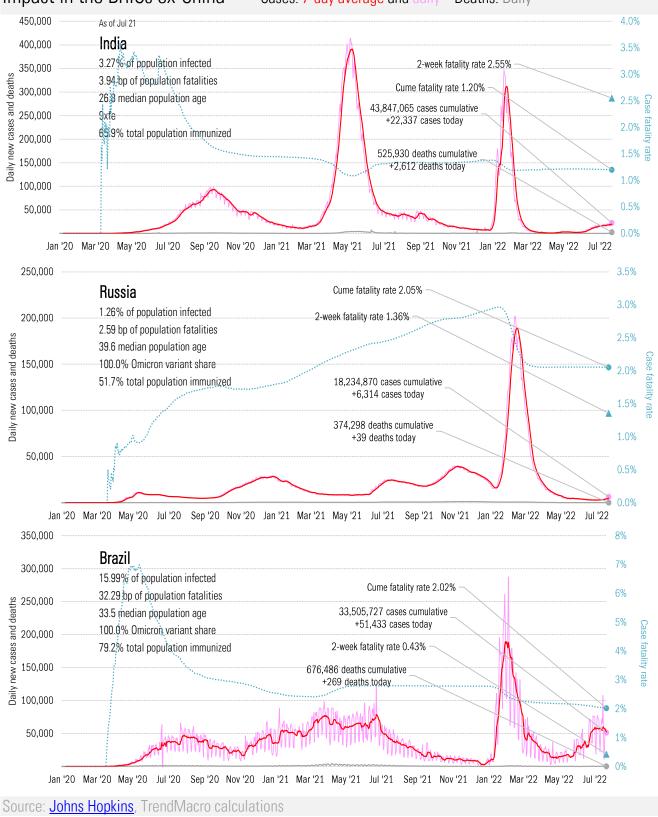
Source: Johns Hopkins, TrendMacro calculations

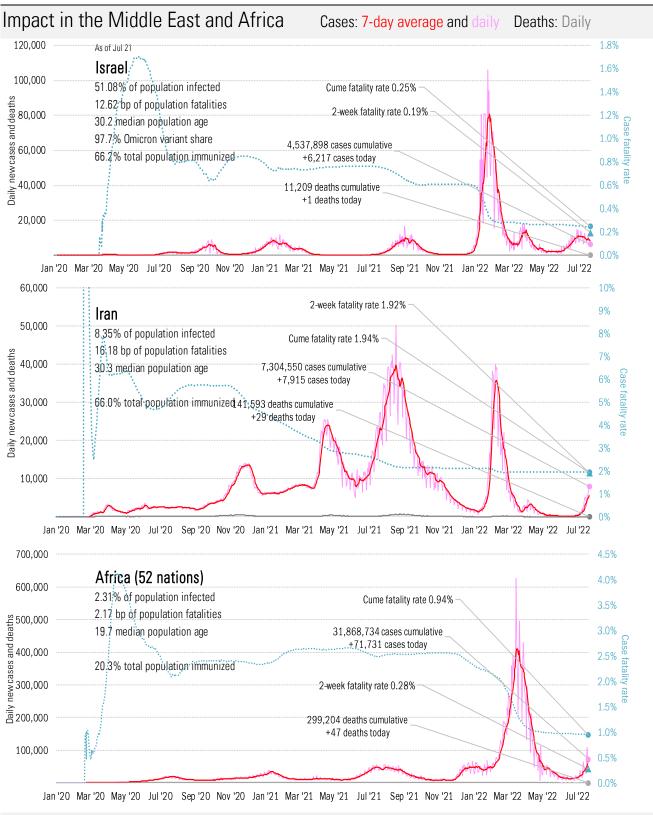




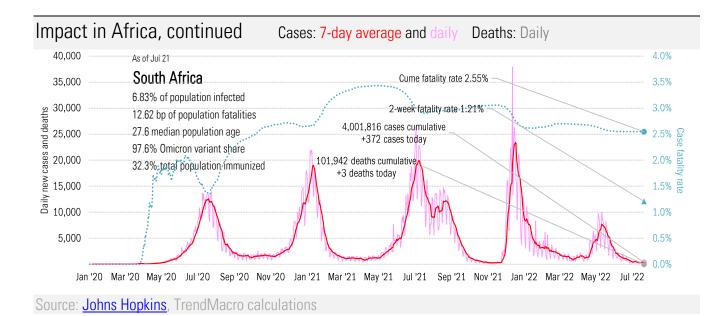


Impact in the BRICs ex-China Cases: 7-day average and daily Deaths: Daily





Source: Johns Hopkins, TrendMacro calculations



TrendMacro Data Insights: Covid-2019 Monitor