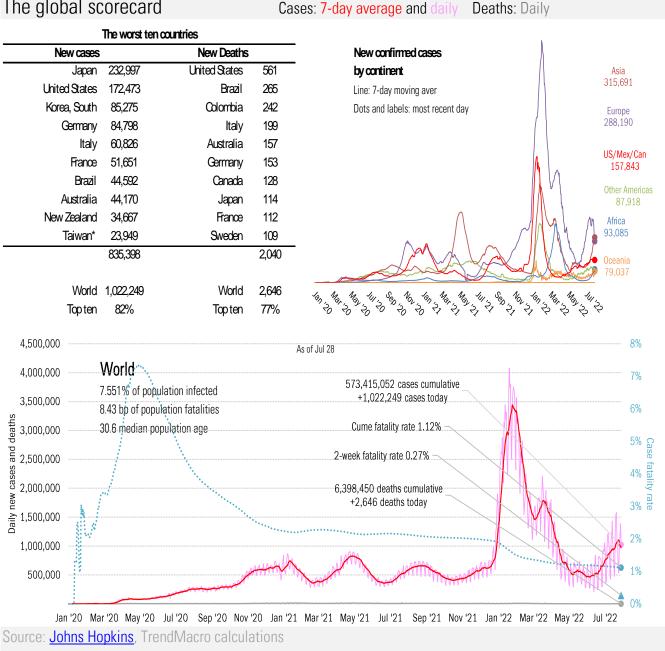


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

Data Insights: Covid-2019 Monitor

Friday, July 29, 2022

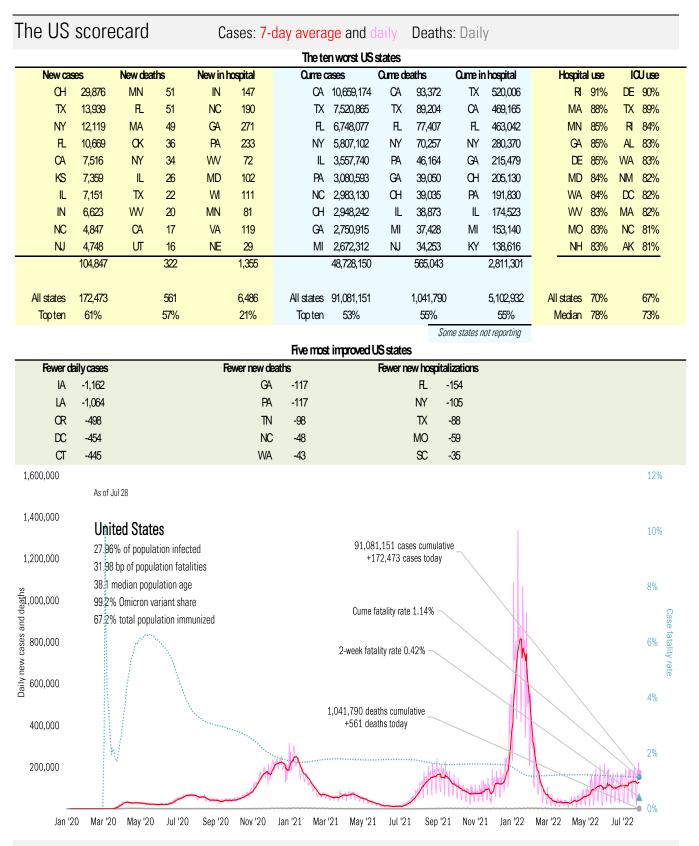
The global scorecard



For more information contact us:

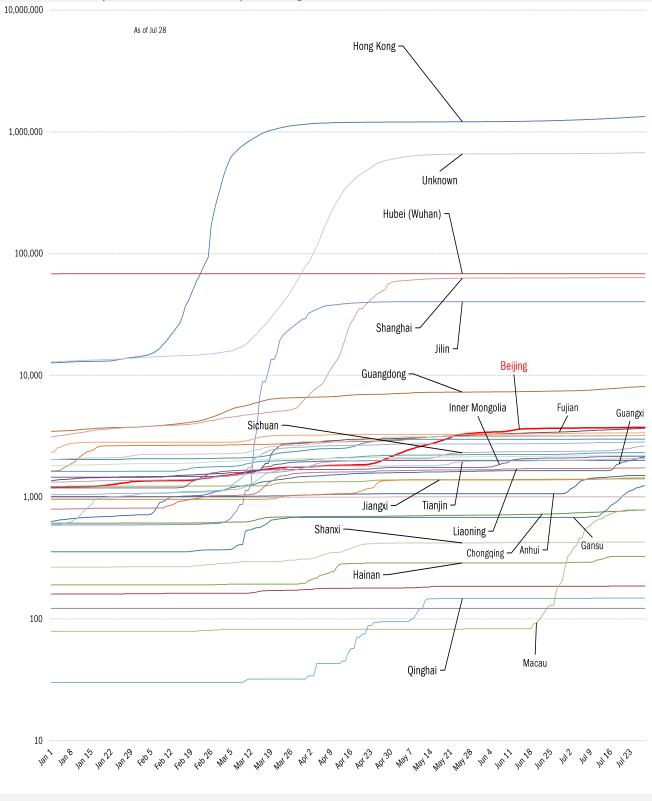
Donald Luskin: 214 550 2121 don@trendmacro.com Thomas Demas: 704 552 3625 tdemas@trendmacro.com

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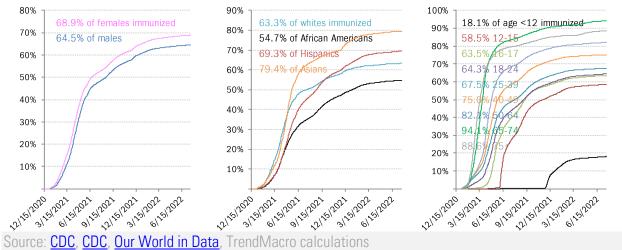
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

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

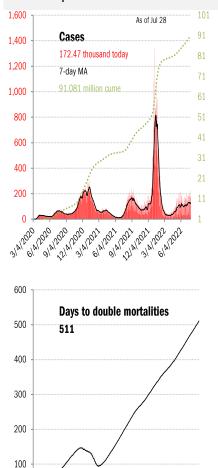


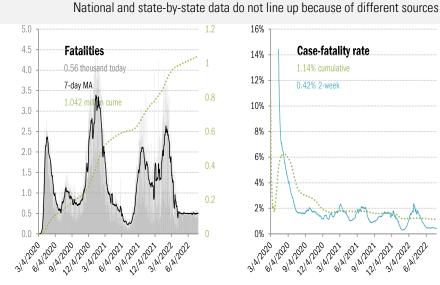
Rolling out the vaccines in the US and the world <u>Updates weekly on Friday</u>											
Administered		lative					Today		Immunity	Full	Partial
Doses	616,635,212							million	US	67.2%	78.7%
of which boosters 109,477,33		9,477,330					+0.068 million		UK	74.8%	79.8%
		One dose		%Pop Imm		% рор	New imm	une todav	y France	78.6%	80.8%
Total population	269,233,447		81%	22	229,268,362		+0.041 million		Spain	85.5%	86.9%
Age 12 to 17	18,017,753		71%	1	15,409,473		+0.003 million		Germany	76.0%	77.6%
Age 18 to 64	180,243,678		89%	15	152,968,762		+0.022 million		ltaly	81.0%	85.8%
Age 65 and over	59,543,060		100%		52,083,438	95%	+0.009	million	Australia	83.8%	86.3%
۲%۱									Israel	66.2%	72.3%
3%									Canada	82.5%	86.0%
	State		Best						Japan	82.2%	83.3%
Moderna 38%			Dest						Africa	20.3%	25.9%
Pfizer	At least partial immunity		Midd						India	65.9%	72.4%
59%	as % population		Midd	10					Brazil	79.2%	86.3%
	Full immunity		1.47						China	88.7%	91.0%
AK	as % population		Wors	st					Global data diff	ers due to sou	rces, timing
71.0%	"Immunity" = two doses				WI		As of Jul 21			ME	
62.9%		72.7%							92.4%		
					66.3%					80.8%	
WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
82.2%	62.6%	66.0%	66.5%	76.1%	76.7%	67.6%		91.4%	95.0%	90.0%	
73.2%	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		-
78.9%	76.5%	58.9%	78.1%	68.7%	62.8%	64.0%	86.7%	91.8%	95.0%		
70.4%	61.6%	51.5%	62.8%	62.6%	56.6%	59.0%	69.9%	76.7%	80.2%		
CA	UT	CO	NE	M0	KY	WV	VA	MD	CT	RI	
83.4%	73.1%	80.7%	71.1%	67.1%	67.0%	65.8%	87.2%	88.1%	95.0%	95.0%	
73.0%	65.0%	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%		
			0K	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%			ТΧ					FL] [PR	l
79.3%			74.8%					80.4%		95.0%	
			62.5%					67.8%		83.7%	

The demographics of US vaccination

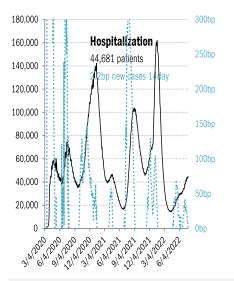


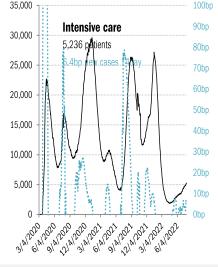
US deep-dive

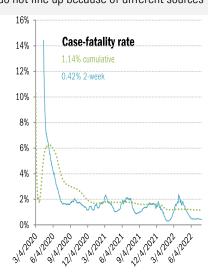


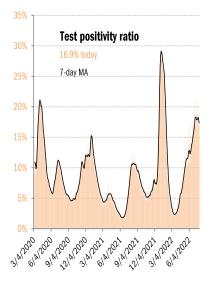


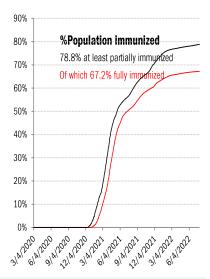




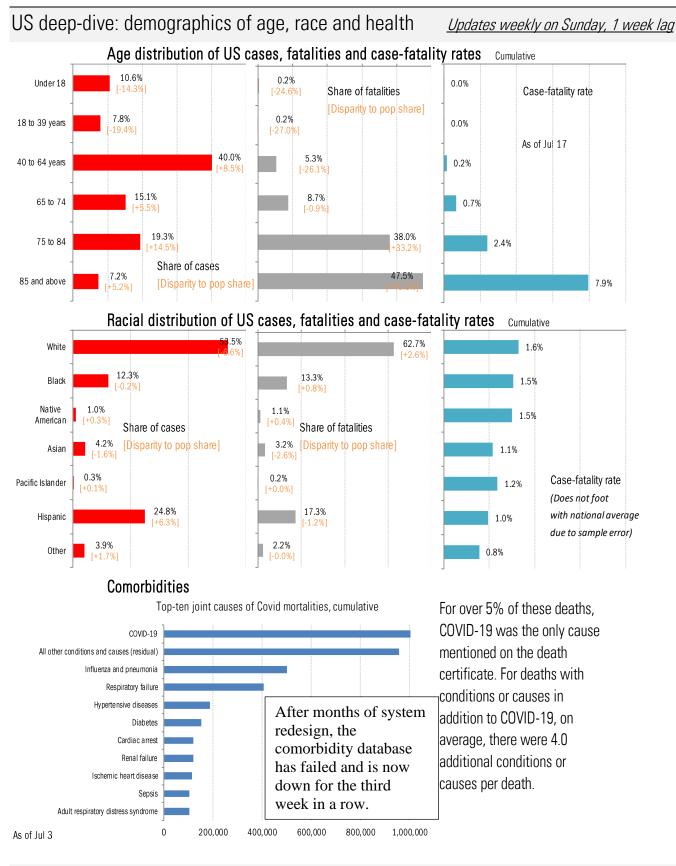








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

Recommended reading

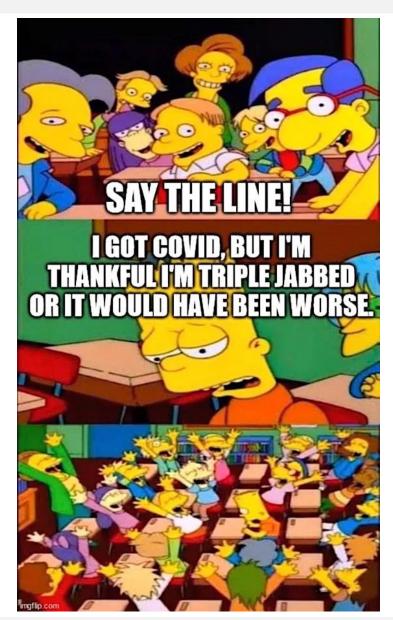
<u>Covid-19 vaccinations and all-cause mortality -a long-</u> term differential analysis among municipalities André Redert *Research Gate* July 2022

<u>URGENT: New paper suggests Covid mRNA</u> vaccination rates are linked to increases in overall

<u>deaths</u>

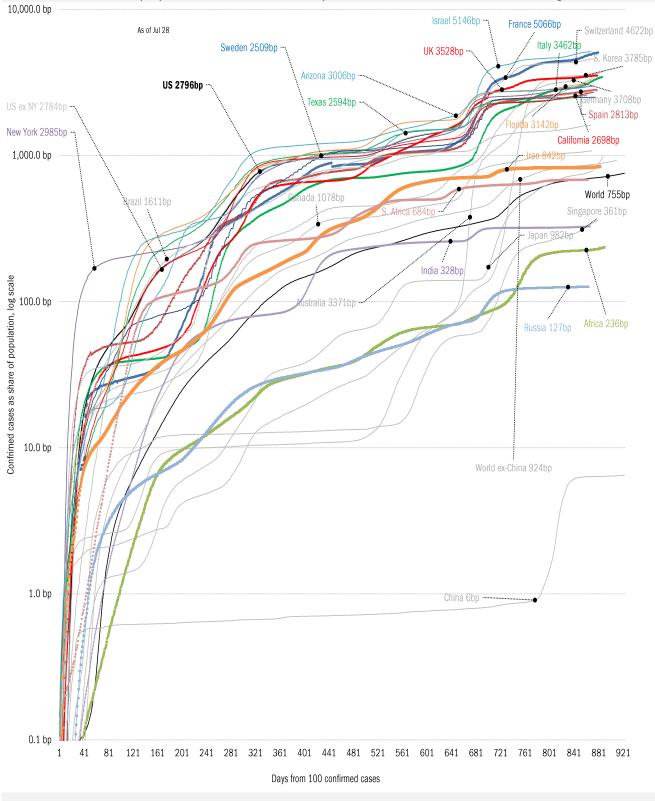
Alex Berenson *Unreported Truths* July 28, 2022

Meme of the day

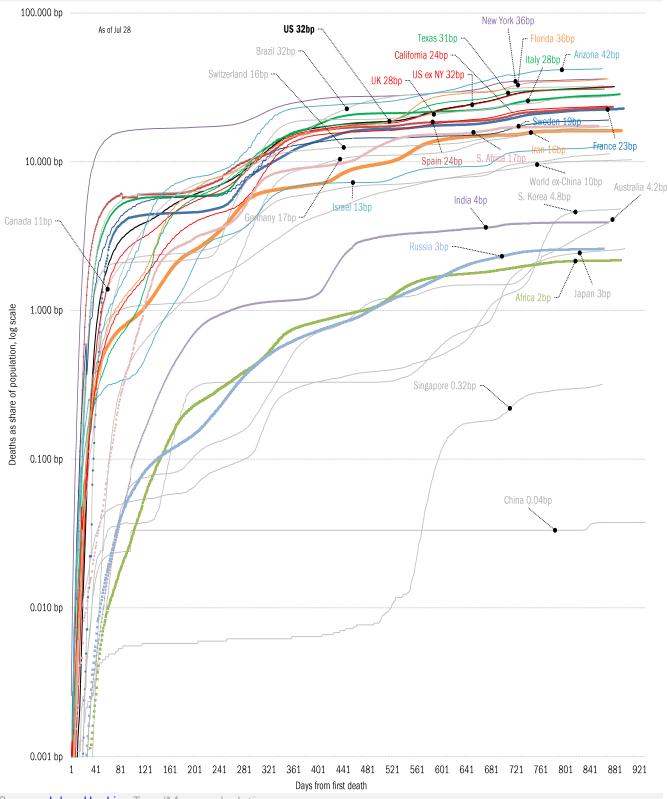


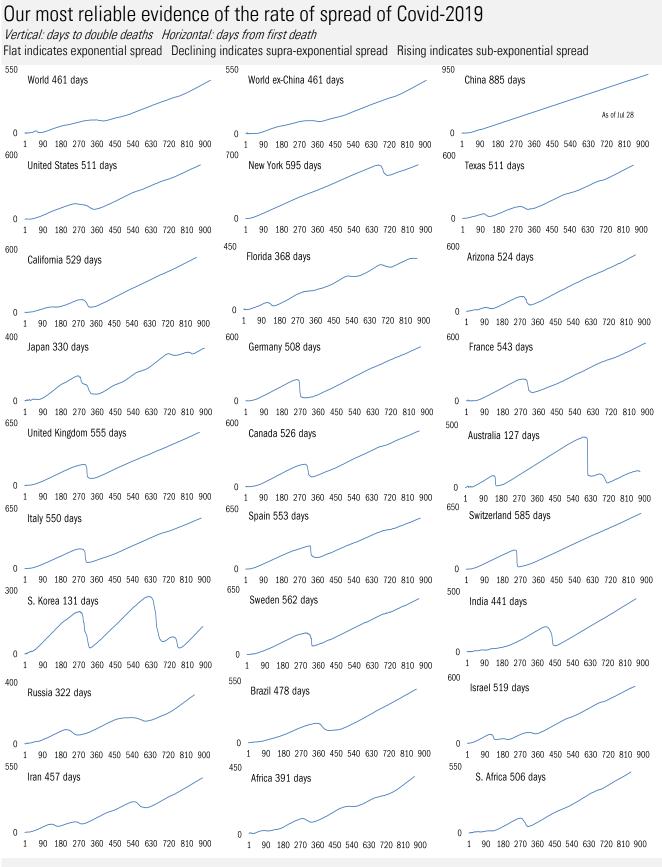
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

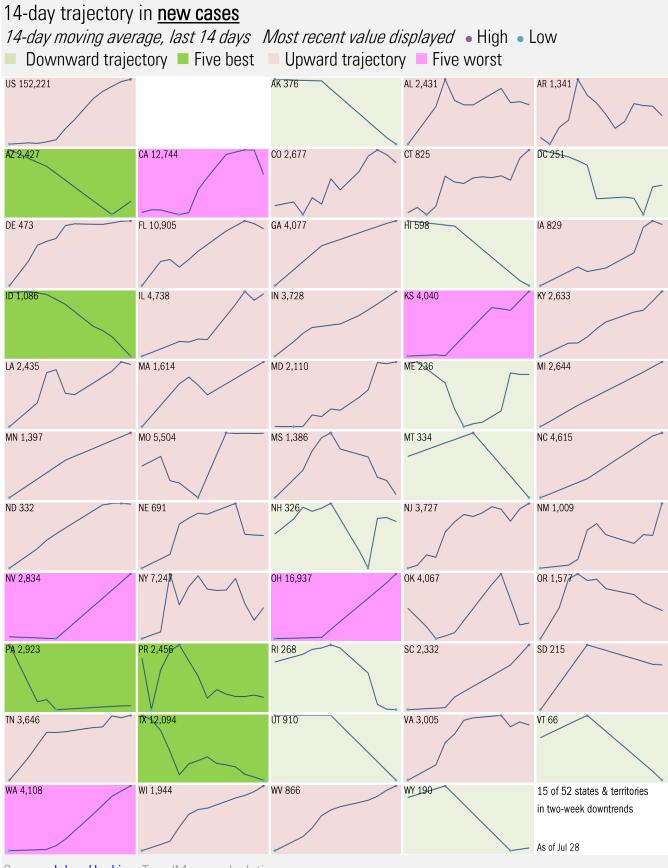
The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves Share of infected population from first day with 100 confirmed cases, log scale



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





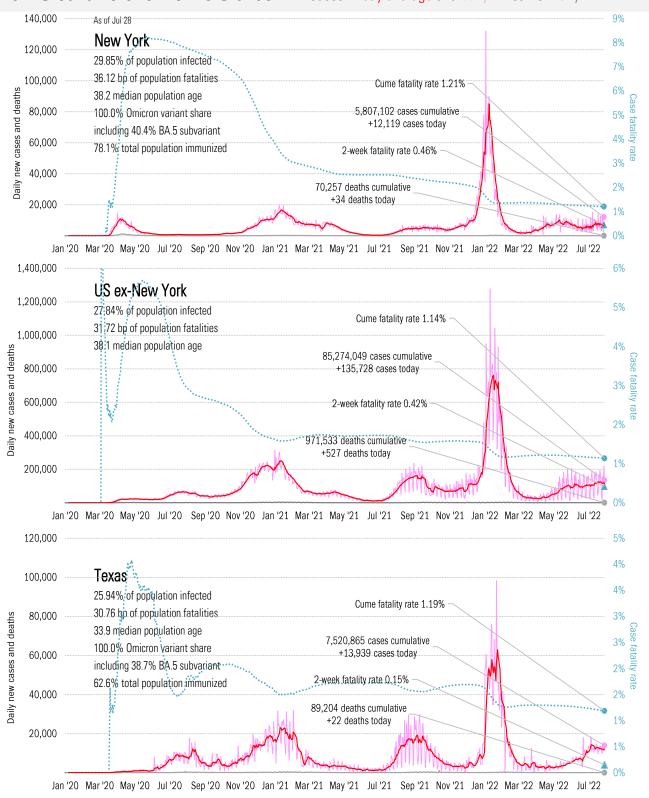




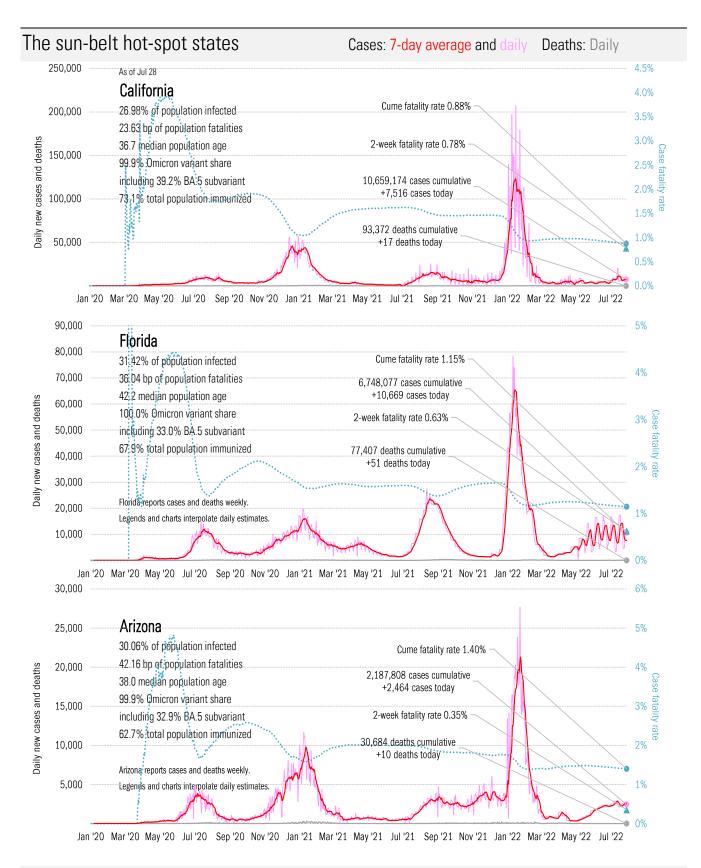
Source: Covid Act Now, TrendMacro calculations

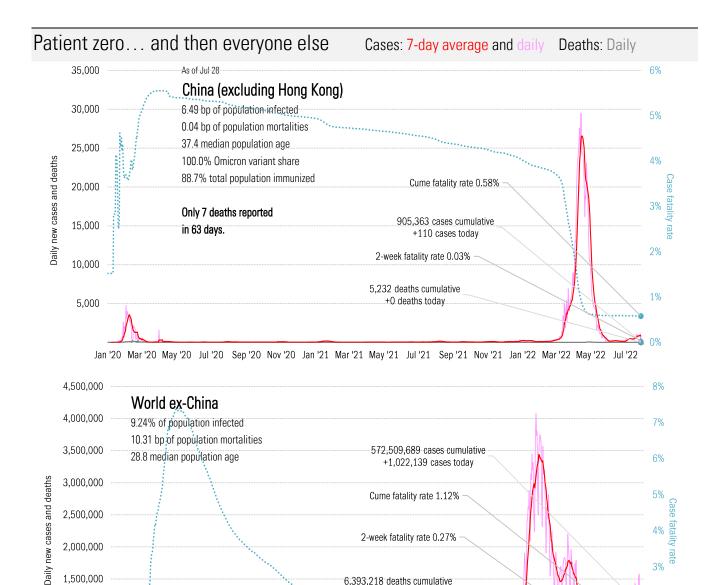
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations





2-week fatality rate 0.27%

6,393,218 deaths cumulative +2,646 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 May '22 Jul '22

Source: Johns Hopkins, TrendMacro calculations

2,000,000

1,500,000

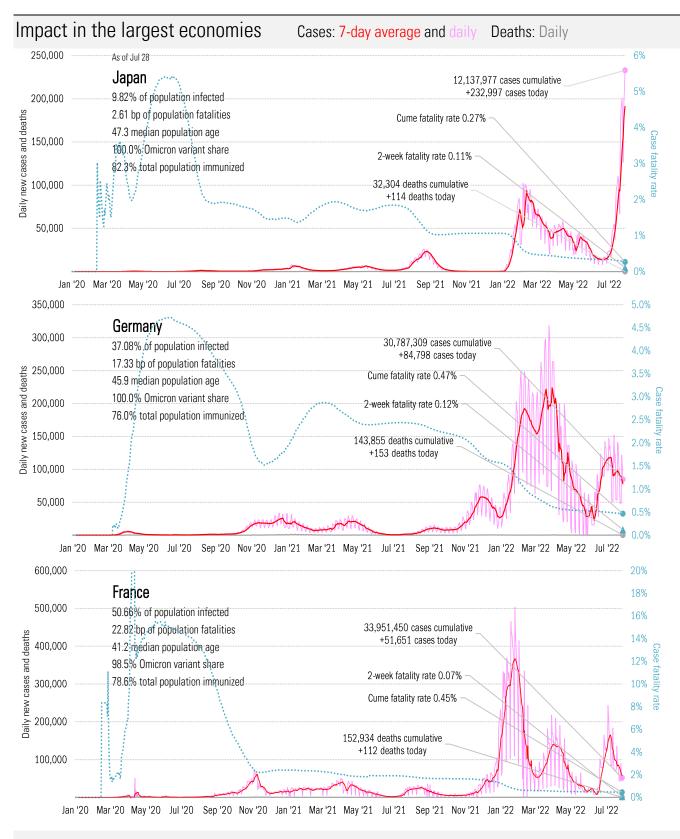
1,000,000

500,000

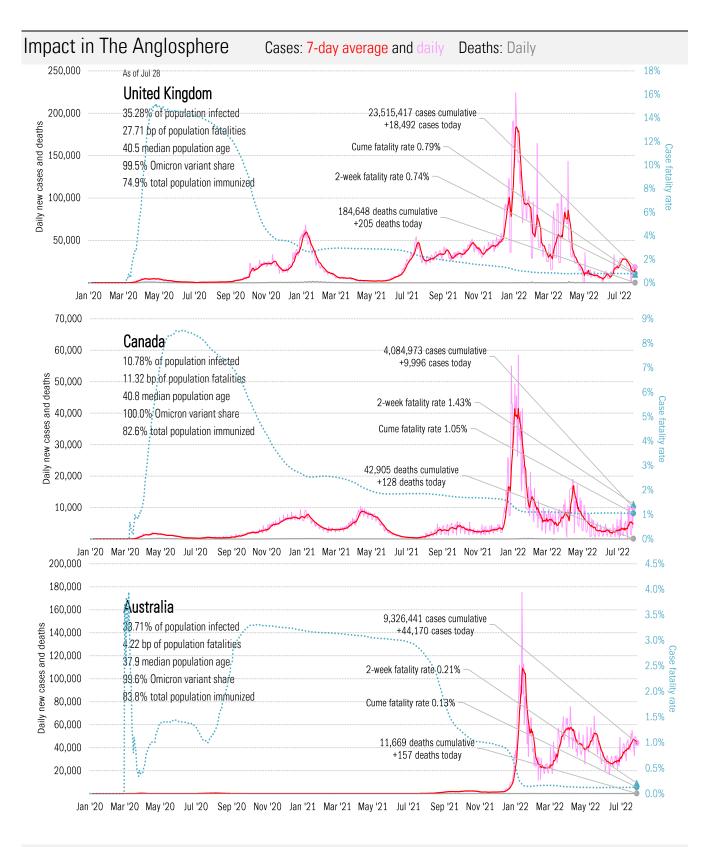
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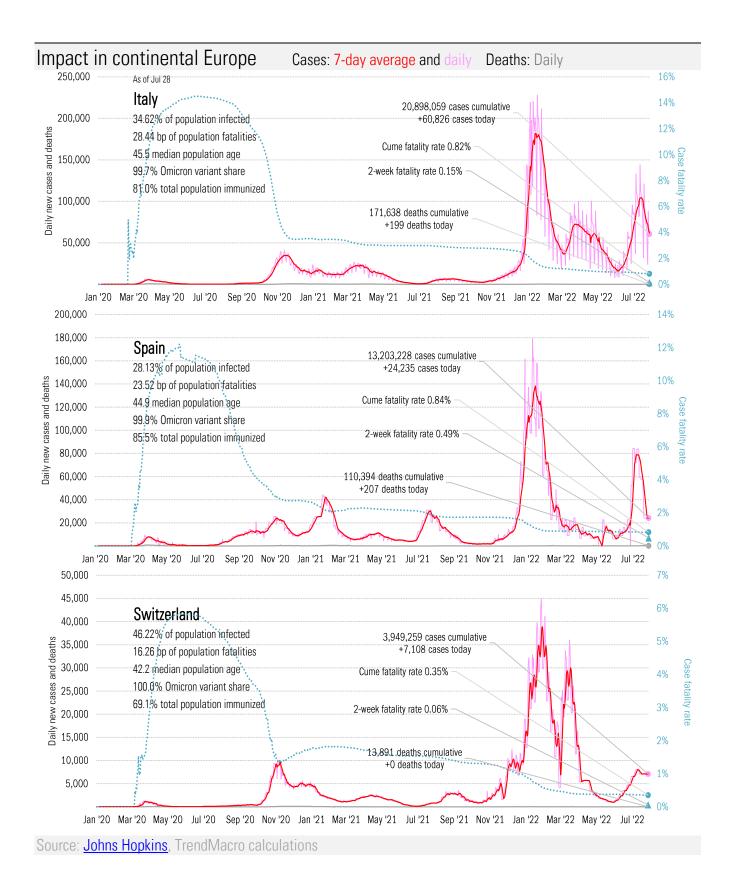
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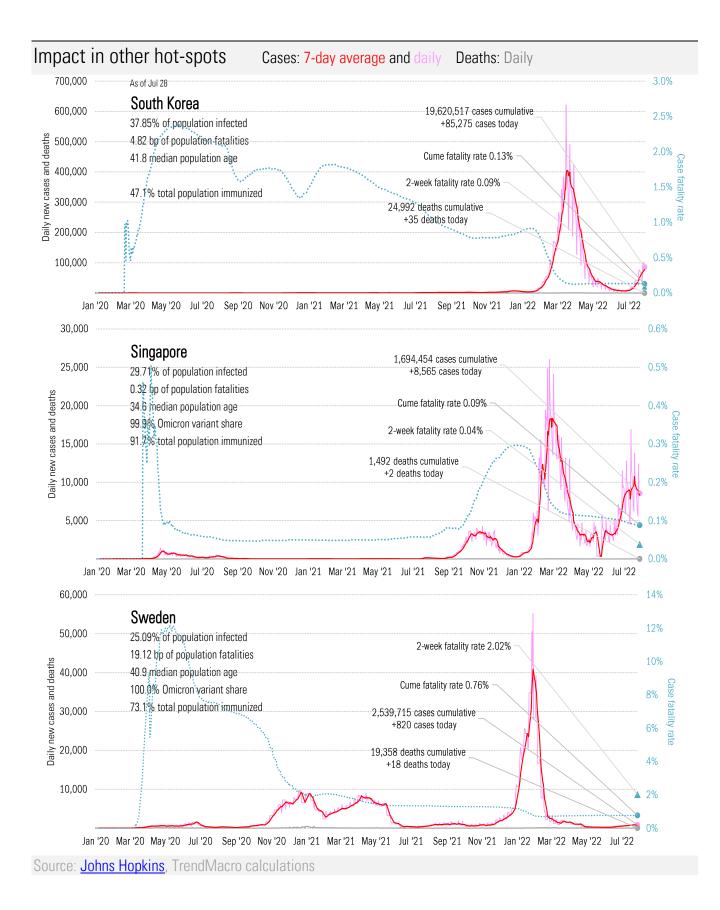
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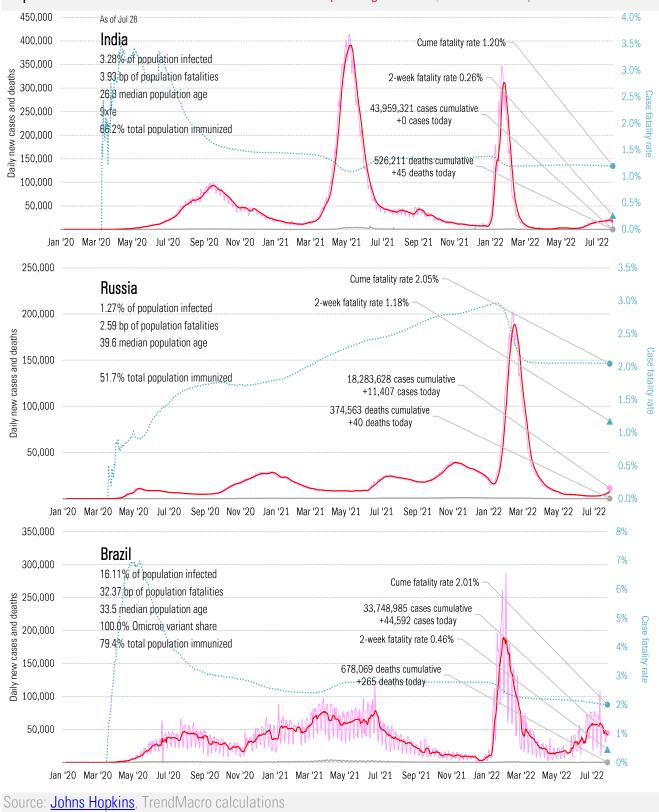
Source: Johns Hopkins, TrendMacro calculations

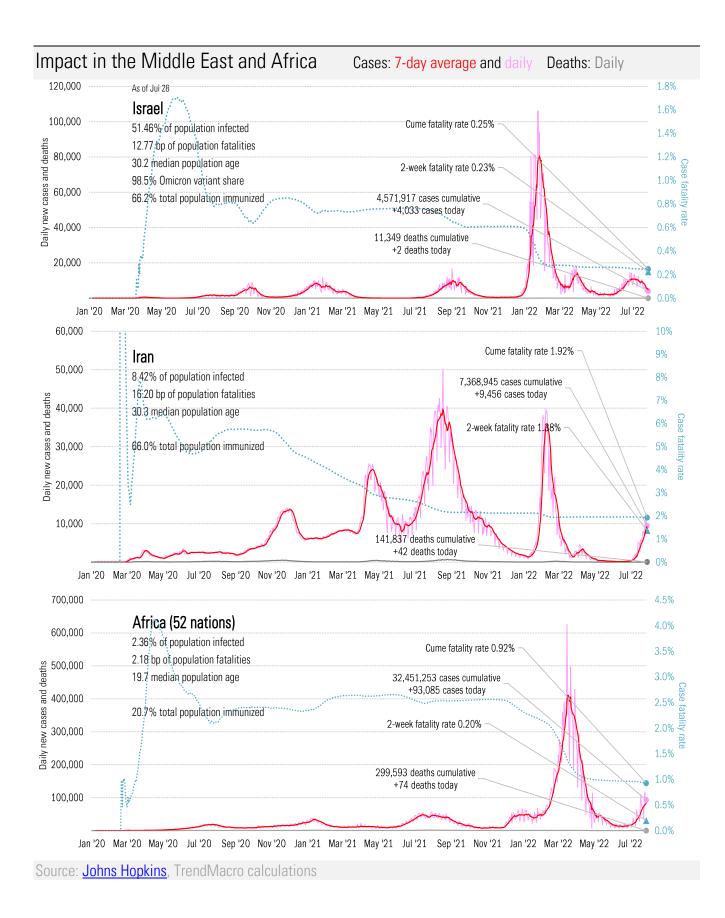




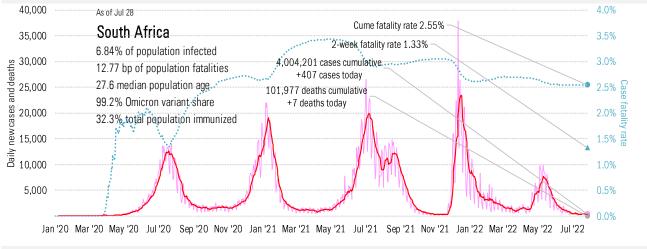


Impact in the BRICs ex-China Cases: 7-day average and daily Deaths: Daily





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



Source: Johns Hopkins, TrendMacro calculations