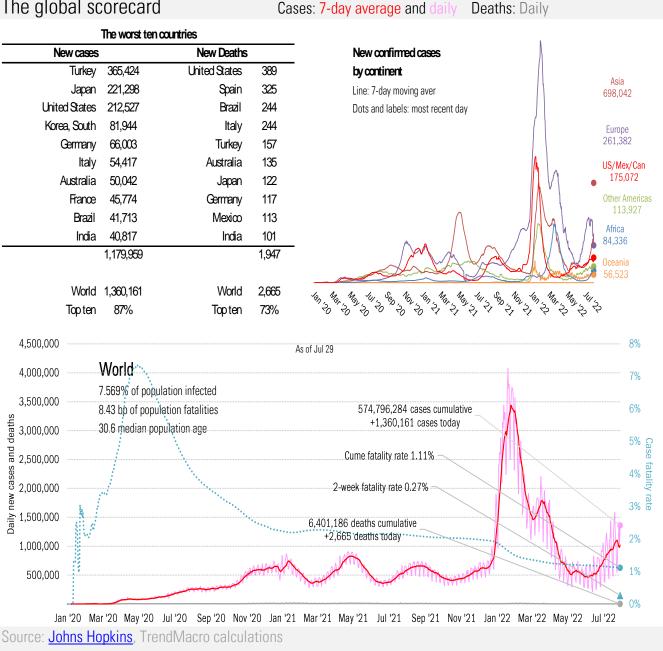


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

#### Data Insights: Covid-2019 Monitor

Saturday, July 30, 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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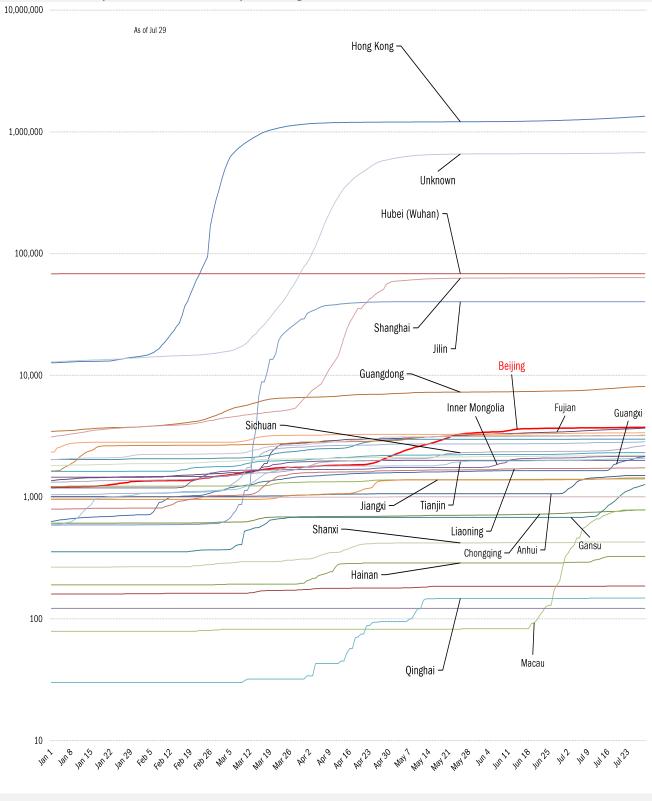
# The US scorecard

#### Cases: 7-day average and daily Deaths: Daily

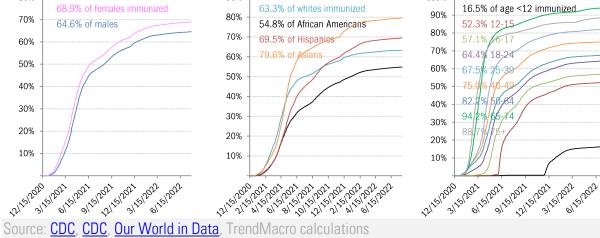
						Thete	n worst US	states							
New cas	æs	New death	ß	New in h	ospital	Qume o		Qume d	eaths	Qume in	hospital	Hospita	al use	IC	Uuse
CA	43,390	US stat	te	IN	160	CA	10,702,564	CA	93,491	TX	520,659	R	91%	R	91%
СН	29,876	fatality		PA	242	TX	7,533,973	TX	89,260	CA	469,873	MA	88%	DE	89%
Æ	16,703	distorte today d		KY	116	Æ	6,764,780	R.	77,474	FL.	463,798	GA	86%	AL	85%
TX	13,108	to	iue	GA	263	NY	5,811,208	NY	70,269	NY	280,620	WA	85%	ΤX	84%
MO	11,500	revisio	ns.	NC	195	IL	3,563,653	PA	46,164	GA	215,738	MN	85%	WA	84%
KS	7,359		20	MD	106	PA	3,080,593	GA	39,050	СН	205,393		84%	NC	82%
L	5,913	ω	18	AL	129	NC	2,983,130	СН	39,035	PA	192,070		84%		82%
IN	5,438	MS	18	NM	39	CH		IL	38,882	IL	174,728	MO	84%		81%
NC	4,847	NM	13	SC	109	GA	2,750,915	MI	37,428	MI	153,270	W	83%		81%
NJ	4,748	VA	13	SD	25	MI		NJ	34,253	KY	138,737	MI	82%	NE	80%
	142,882		400		1,384		48,811,370		565,306		2,814,886				
All states	212,527		389		6,509	All states	91,225,861		1,042,179		5,109,452	All states	70%		67%
Topten	67%		103%		21%	Top ten	53%		55%		55%	Median	77%		74%
									Son	ne states ri	ot reporting				
						Five mos	t improved l	JS state	s						
	ailycases			Fe	ewer new dea			Fewer n	ew hospital						
NY	-8,013				MN	-51				190					
IL	-1,238				MA	-49				-80					
IN	-1,185				CK	-36				-74					
LA	-1,034				NY	-22				-50					
TX	-831				L	-17			CH ·	-40					
,600,000															12%
	As of Ji	ul 29													
,400,000		1011													
		ed State													10%
,200,000		% of populat					91	,225,861	cases cumu	lative					
., ,		bp of popula							?7 cases toda						
		nedian popula	-								$\geq 1$				8%
.,000,000		Omicron var													
1,000,000	67.2%	total popula	ation imm	unized			Cur	ne fatality	rate 1.14%						
800,000 600,000		a de la compañía de l	N.								Λ	$\langle \rangle$			6%
		4	A.				2-we	ek fatalitv	rate 0.42% -	_					
600,000			$\sim \sqrt{2}$												
			$\sim \lambda$									$\langle \rangle$			4%
100.000				Sec. 1			1,042,179	9 deaths (	cumulative				$\langle \rangle$		
400,000				1999 B	·····			9 deaths t					$\langle \rangle$		
					and the second									/	2%
200,000					AL.	M/			HUN						l
200,000						· ''\	1			Hauld			h	La got	7
200,000						N	<ul> <li>h \u03c6 (19)</li> </ul>		<b>Z</b>			1 N			4
		<u> </u>					AN ALLER AND AND A	~~~~~		111 Million	JAII.	1 Mary APP		HIL	<b>▲</b> ● 0%

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

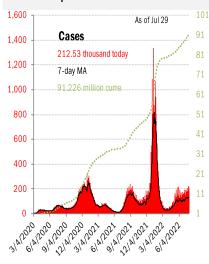
**China provincial** coronavirus <u>case</u> accelerometer... tracking the "zero Covid" curves *Cumulative reported cases this year, log scale: flat line indicates "zero Covid"* 

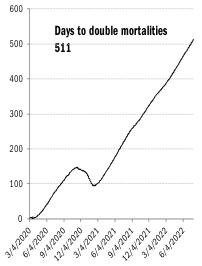


Administered	red Cumulative		lative					To	day	Immunity Full		Partia	
loses			18,880,610						million	US	67.2%	78.8%	
of which boosters		10	)9,944,235					+0.067	million	UK	74.9%	79.8%	
		One dose		% Pop	Imn	Immune		New immune today		France	78.6%	80.9%	
otal population		269,704,032		81%	2	229,576,521		+0.044 million		Spain	85.5%	86.9%	
Age 12 to 17			18,050,227	71%		15,431,741		+0.003 million		Germany	76.0%	77.6%	
Age 18 to 64			89%	1	153,104,165		+0.019 million		Italy	81.0%	85.8%		
Age 65 and over		Ę	59,610,629			52,148,393		+0.009 million		Australia	83.8%	86.4%	
1&1										Israel	66.2%	72.3%	
3%										Canada	82.6%	86.0%	
		04		Deed						Japan	82.3%	83.4%	
Moderna 38% Pfizer 59%		Sta	ate	Best						Africa	20.7%	26.4%	
		At least part	tial immunity							India	66.2%	72.5%	
		as % po	pulation	Midd	le					Brazil	79.4%	86.4%	
		Full im	munity							China	88.7%	91.1%	
AK		as % po	pulation	Wors	st					Global data differs	due to sources	s, timing	
71.1%		"Immunity" = two	o doses			WI		As of Jul 28		Г	ME		
63.0%						72.8%					92.6%		
						66.3%					80.9%		
W	/Α	ID	MT	ND	MN	IL	MI	1	NY	VT	NH		
82.	3%	62.6%	66.2%	66.6%	76.3%	76.8%	67.7%		91.6%	95.0%	90.0%		
	3%	56.1%	57.5%	56.3%	70.0%	69.3%	60.8%		78.1%	82.3%	71.9%		
	R	NV	WY	SD	IA	IN	OH	PA	NJ	MA			
79.	0%	76.6%	59.0%	78.4%	68.8%	62.9%	64.1%	86.9%	91.9%	95.0%			
70.		61.7%	51.6%	63.1%	62.6%	56.6%	59.0%	70.0%	76.8%	80.4%			
	A	UT	CO	NE	MO	KY	WV	VA	MD	CT	RI		
83.	6%	73.1%	80.8%	71.3%	67.2%	67.1%	65.9%	87.4%	88.3%	95.0%	95.0%		
	1%	65.0%	71.1%	64.4%	57.0%	58.1%	58.3%	74.2%	76.8%	80.4%	84.2%		
		AZ	NM	KS	AR	TN	NC	SC	DC	DE			
		74.9%	89.8%	73.7%	67.8%	63.0%	86.6%	68.9%	95.0%	84.7%			
		62.7%	72.4%	62.9%	55.3%	55.1%	63.0%	57.9%	77.6%	70.4%			
			, ,	OK	LA	MS	AL	GA					
				72.3%	61.8%	60.5%	63.6%	66.4%					
HI 89.1%				58.3%	54.1%	52.6%	51.9%	55.6%					
				TX					FL	1 Г	PR		
79.4%				75.0%					80.5%		95.0%		
				62.6%					67.9%		83.7%		
			I										
he demographi	cs of	US vaccinat	ion										
80% -				90% J				100%					
00 <i>1</i> 0 T				30/0 1				10070 1					



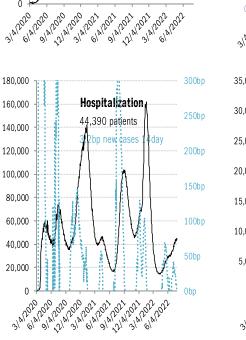
### US deep-dive

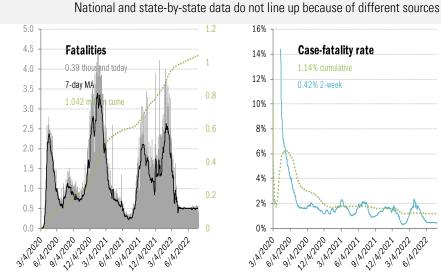




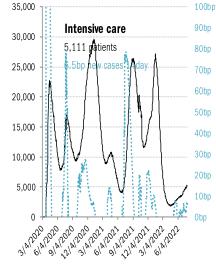
180,000

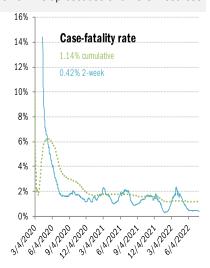
160,000

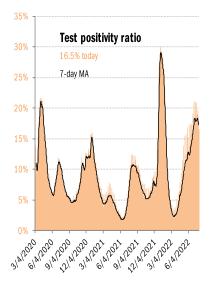


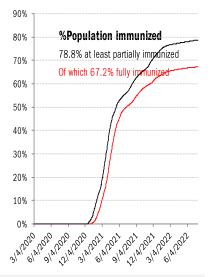




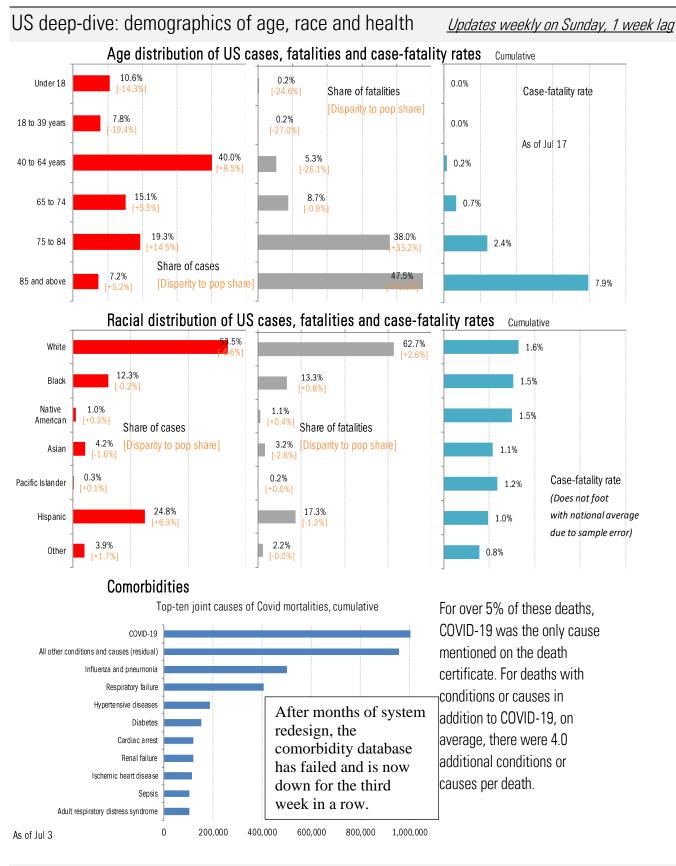








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

## Recommended reading

<u>15% of American Adults Diagnosed With New</u> <u>Condition After COVID Vaccine, Zogby Survey Finds</u> *The Defender* July 28, 2022

Attorney 'Thrilled' After Federal Judge Blocks COVID Vaccine Mandate for Air Force, Air National Guard

Megan Redshaw *The Defender* July 29, 2022

#### <u>Three Pressing Questions About Monkeypox: Spread,</u> <u>Vaccination, Treatment</u>

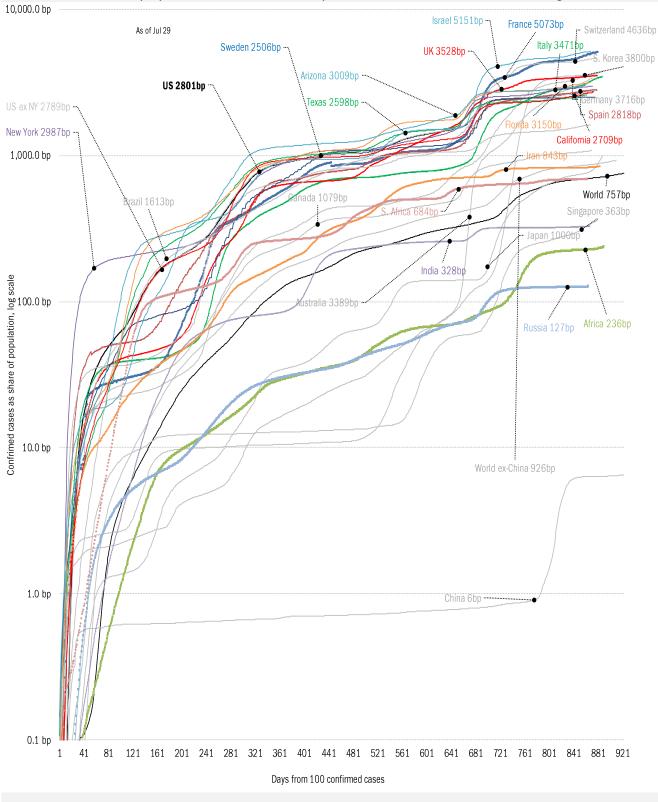
Apoorva Mandavilli *New York Times* July 20, 2022

# Meme of the day

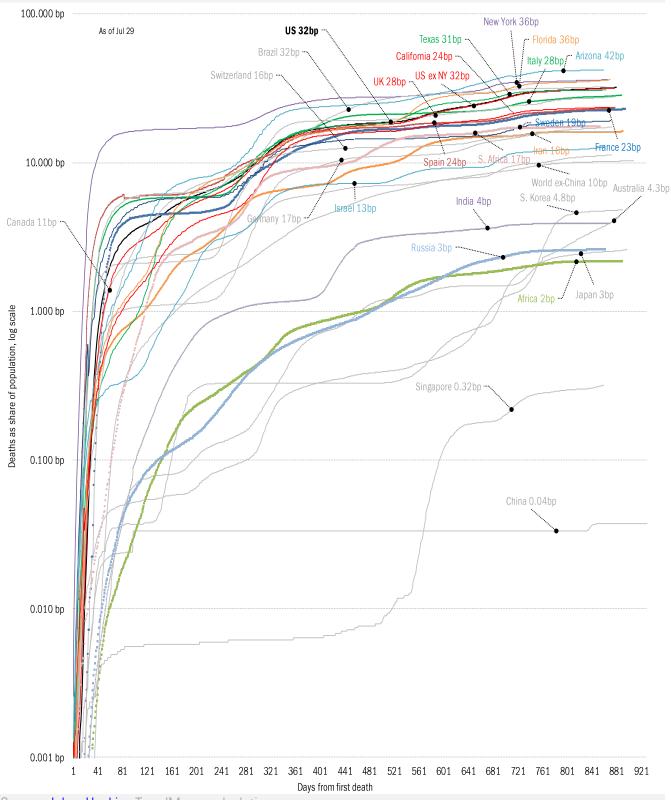


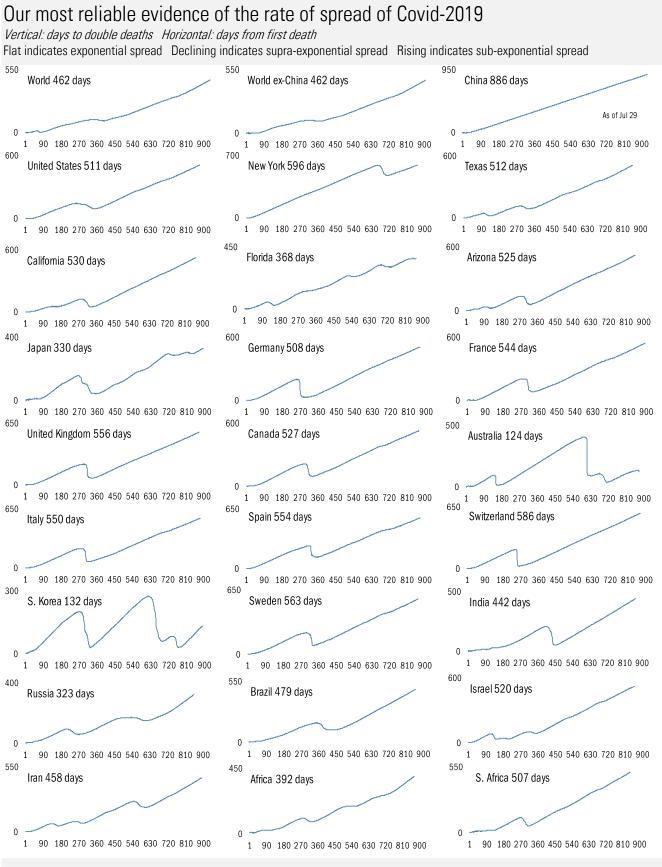
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

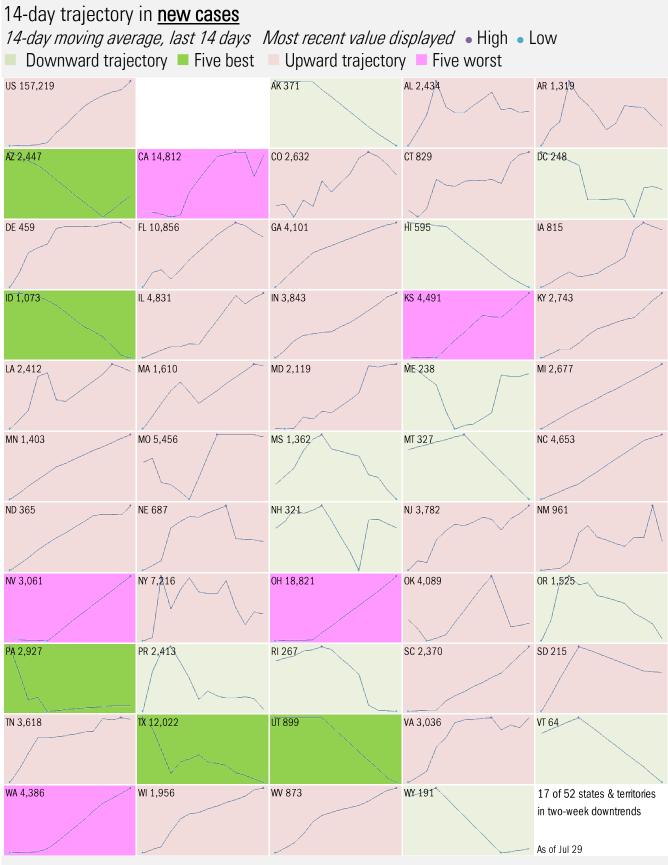
# The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves Share of infected population from first day with 100 confirmed cases, log scale



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





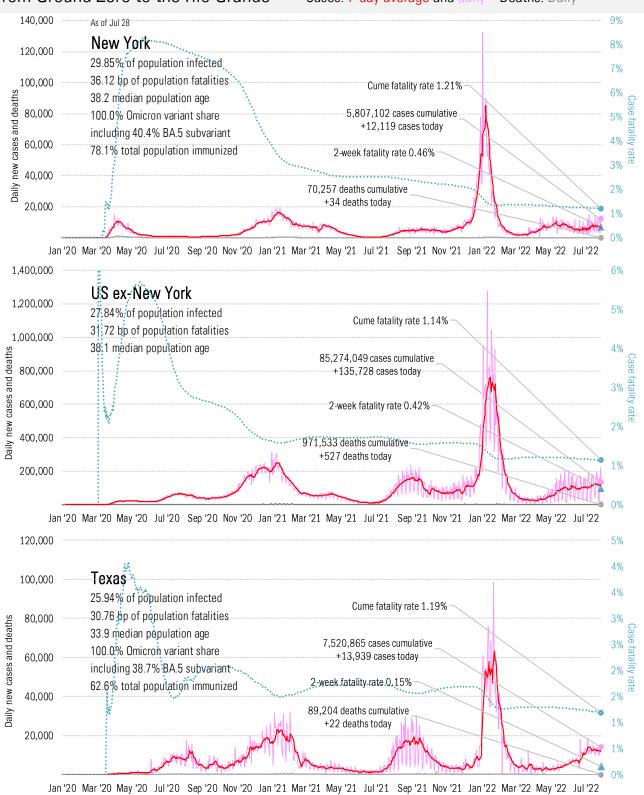




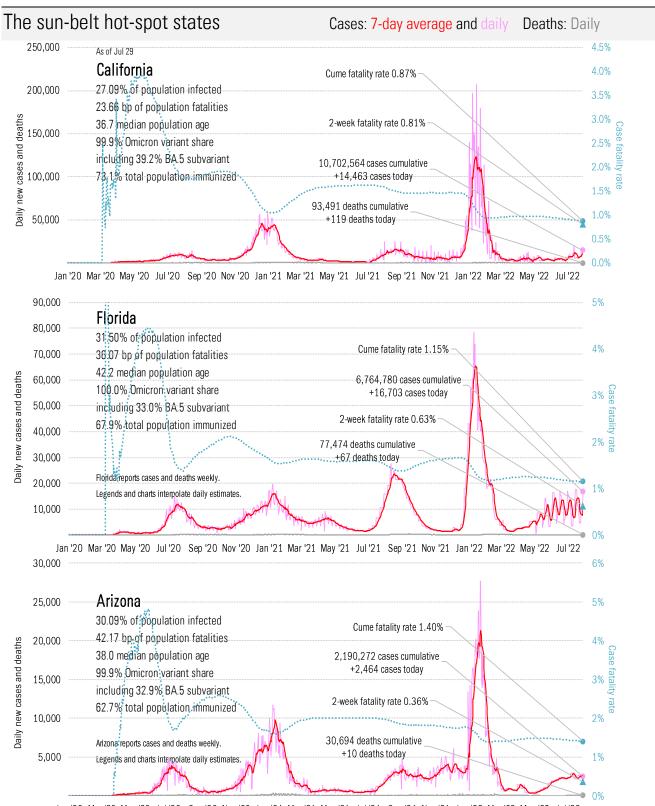
Source: Covid Act Now, TrendMacro calculations

From Ground Zero to the Rio Grande

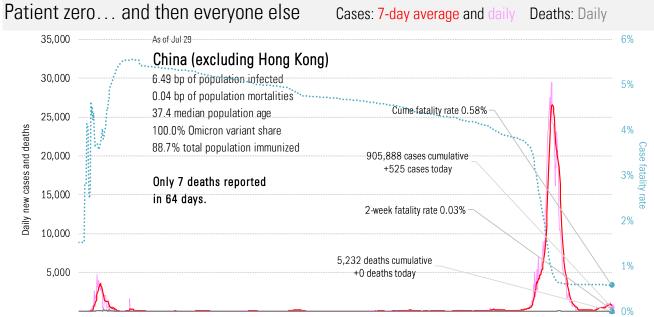
Cases: 7-day average and daily Deaths: Daily



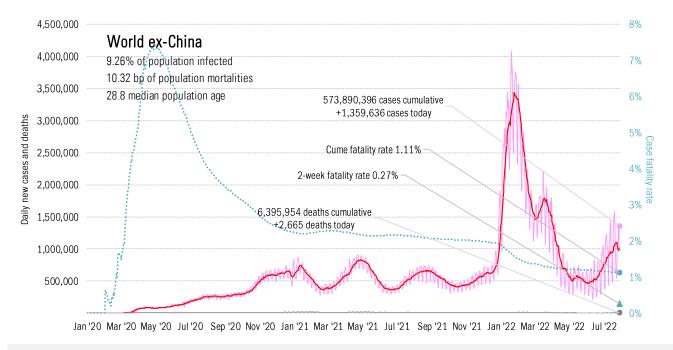
Source: Johns Hopkins, TrendMacro calculations



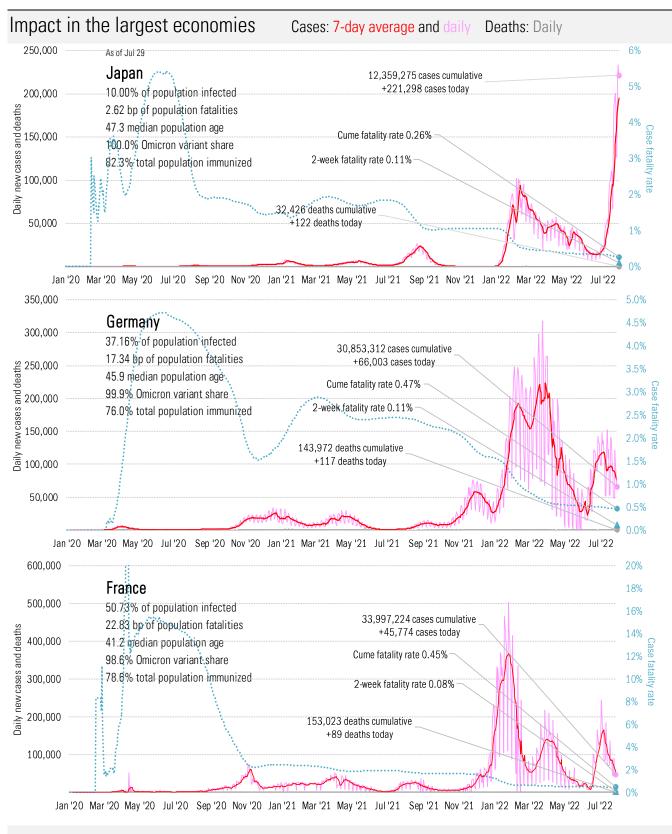
Jan '20 Mar '20 May '20 Jul '20 Sep '20 Nov '20 Jan '21 Mar '21 May '21 Jul '21 Sep '21 Nov '21 Jan '22 Mar '22 May '22 Jul '22



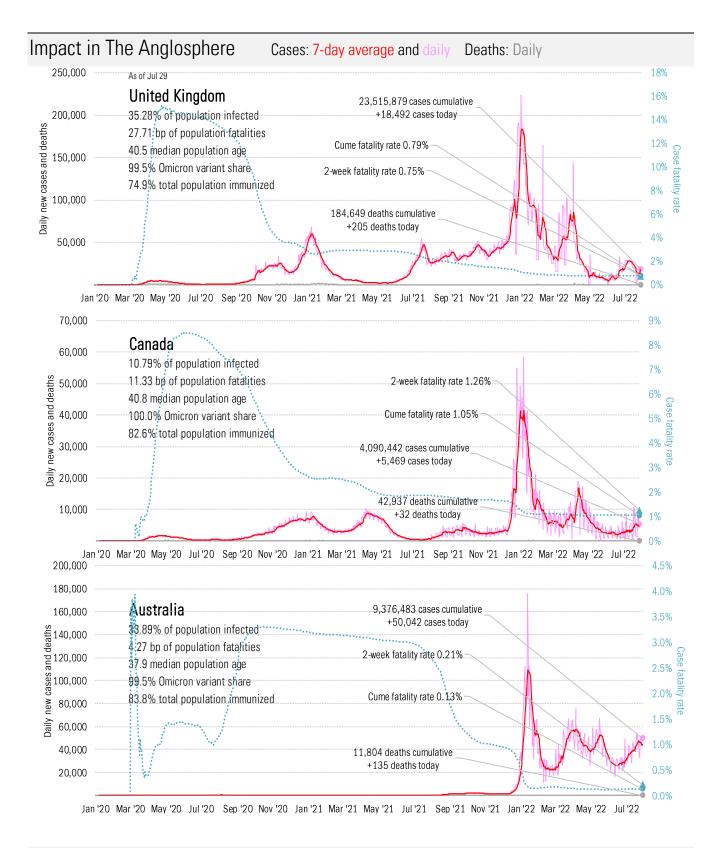
Jan '20 Mar '20 May '20 Jul '20 Sep '20 Nov '20 Jan '21 Mar '21 May '21 Jul '21 Sep '21 Nov '21 Jan '22 Mar '22 May '22 Jul '22

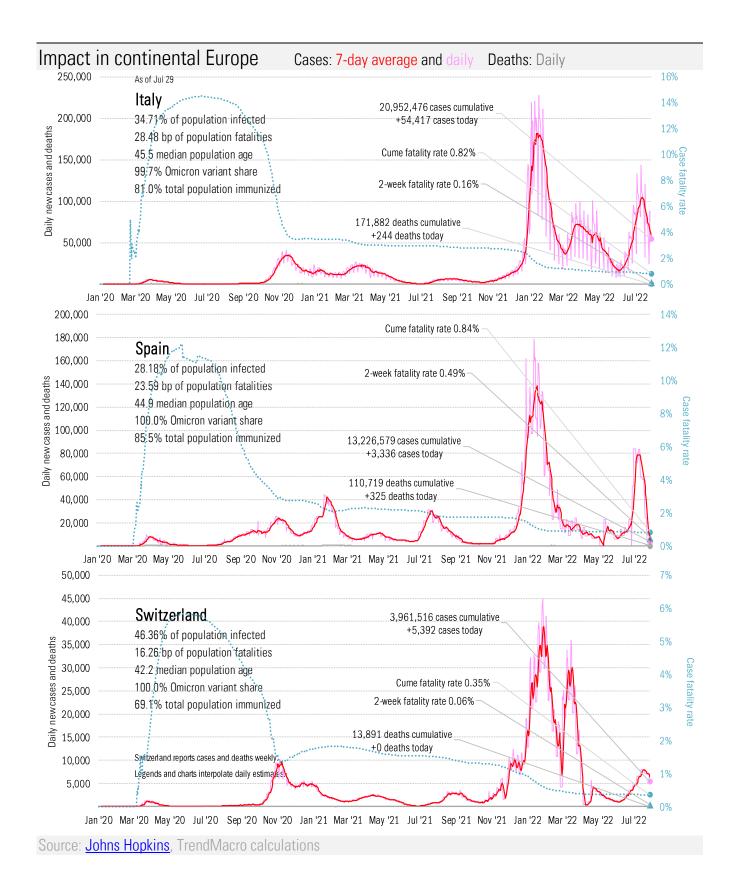


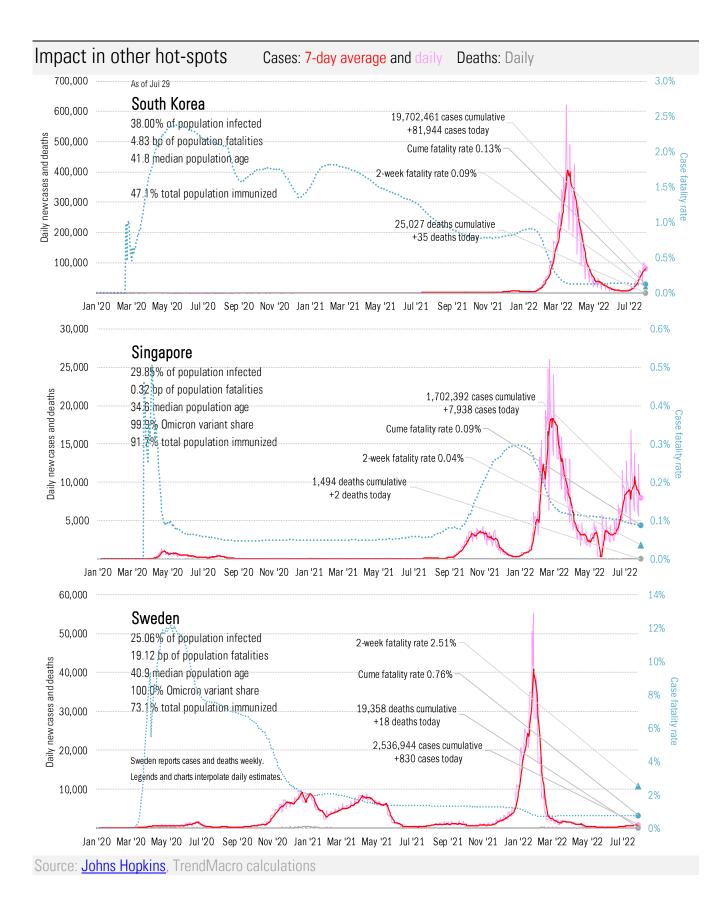
Source: Johns Hopkins, TrendMacro calculations



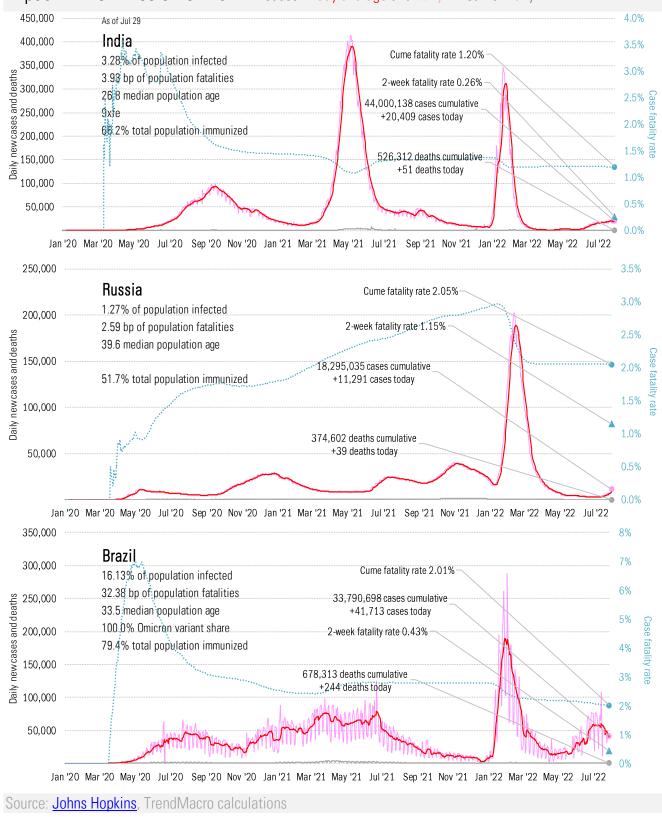
Source: Johns Hopkins, TrendMacro calculations

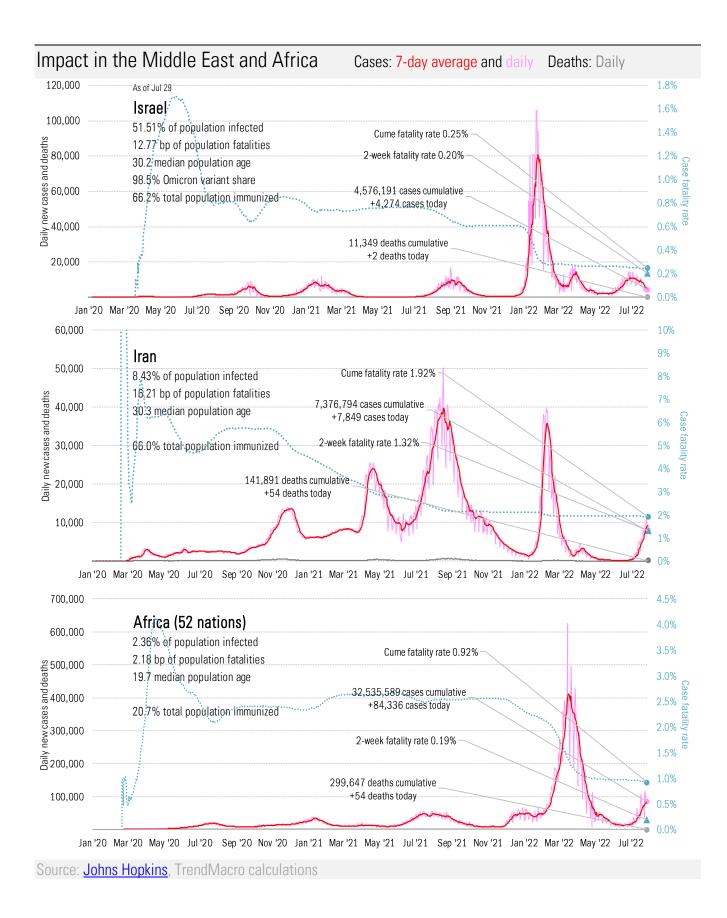


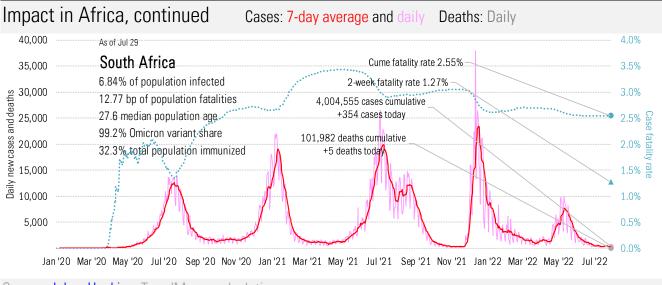




Impact in the BRICs ex-China Cases: 7-day average and daily Deaths: Daily







Source: Johns Hopkins, TrendMacro calculations