

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

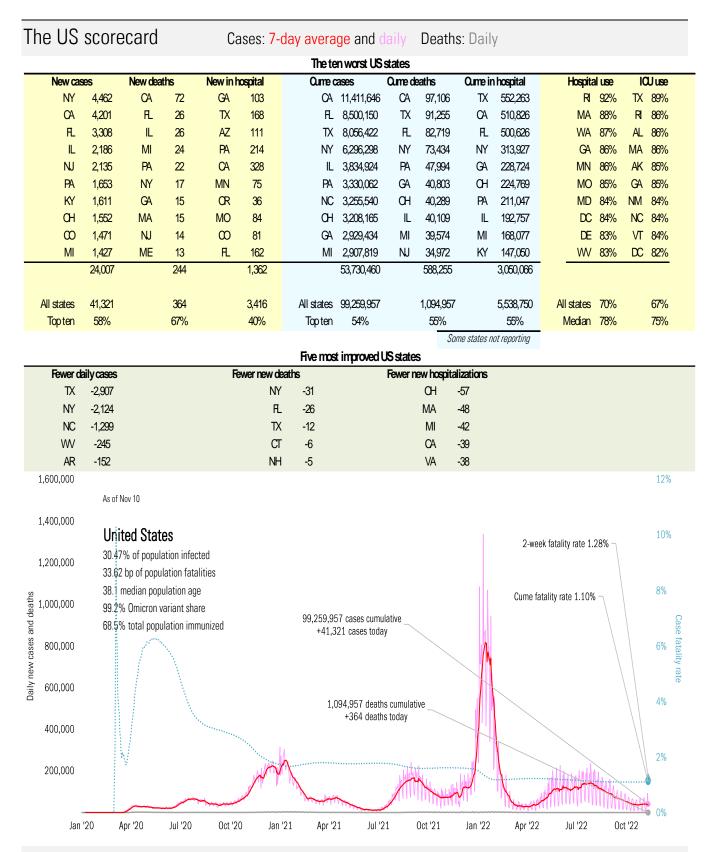
Data Insights: Covid-2019 Monitor

Friday, November 11, 2022

The global scorecard Cases: 7-day average and daily Deaths: Daily The worst ten countries New Deaths New confirmed cases New cases United Kingdom 78,577 734 by continent Japan United States Korea, South 54,519 364 Line: 7-day moving aver Asia 123,039 United States 41,321 Germany 216 Dots and labels: most recent day Brazil 34,084 Brazil 212 Europe 119,111 Finland 172 Germany 33,703 Australia 28,958 Canada 153 US/Mex/Can 77,703 France 27.068 Sweden 104 United Kingdom 24,253 Japan 100 Africa 57,512 Taiwan* 22,320 Taiwan* 66 Finland 11,930 Russia 59 Other Americas 41.835 356,733 2,180 28.975 2,744 141.30 World 452.326 World 1817 :20 107-120 OCT , 20 141 :27 Oct in 107-127 Sa, ÷, ź ć Topten 79% Top ten 79% 4,500,000 8% As of Nov 10 World 4,000,000 7% 8.342% of population infected Cume fatality rate 1.04% 3,500,000 8.71 bp of population fatalities 6% aj,000,000 3,000,000 2,500,000 2,000,000 1,500,000 633,524,492 cases cumulative 30.6 median population age +452,326 cases today 5% Case 2-week fatality rate 0.40% fatality 4% 6,617,596 deaths cumulative 3% rate +2,744 deaths today 2% 1,000,000 1% 500,000 0% Jan '20 Apr '20 Jul '20 Oct '20 Jan '21 Apr '21 Jul '21 Oct '21 Jan '22 Apr '22 Jul '22 Oct '22 Source: Johns Hopkins, TrendMacro calculations

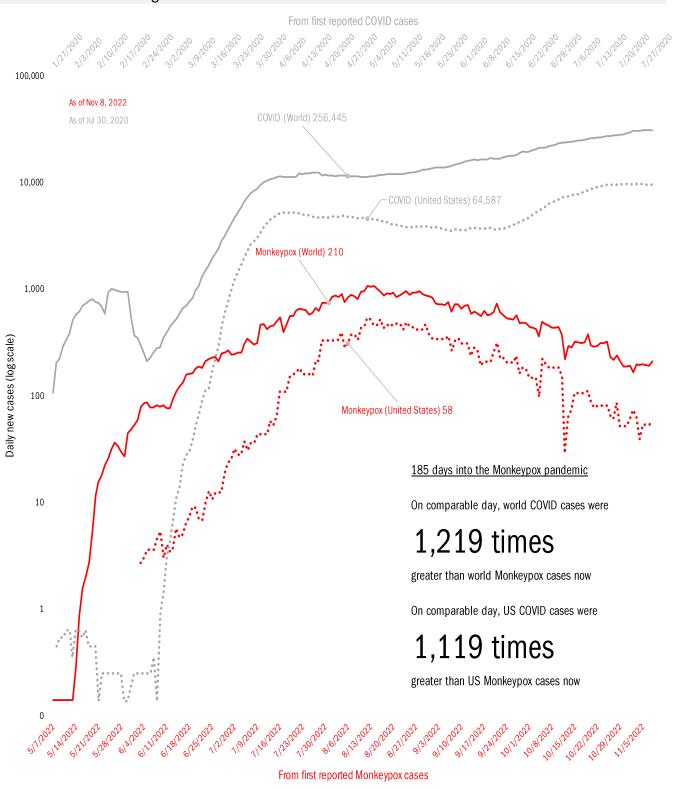
For more information contact us: Donald Luskin: 214 550 2121 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 <u>tdemas@trendmacro.com</u>

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

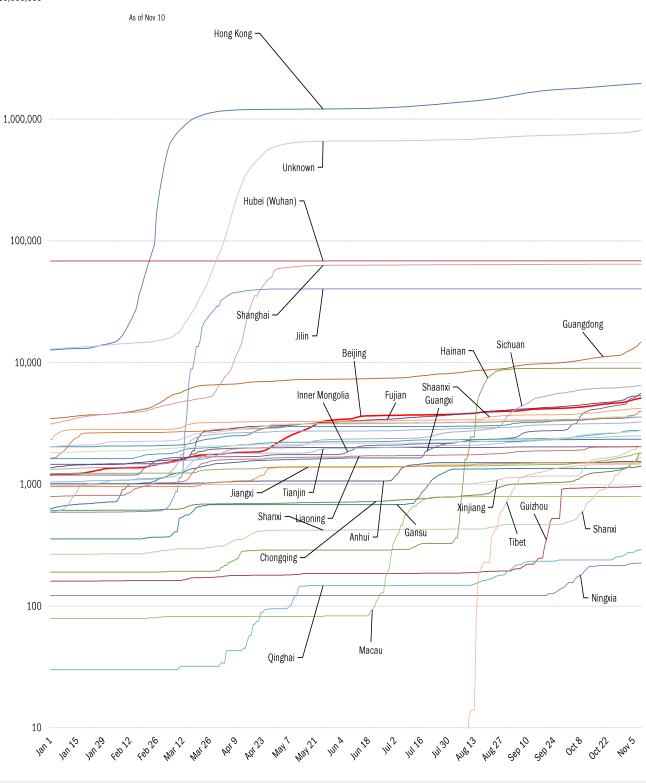
The **Monkeypox** contextualizer The course of case growth versus COVID



Source: Our World In Data, TrendMacro calculations

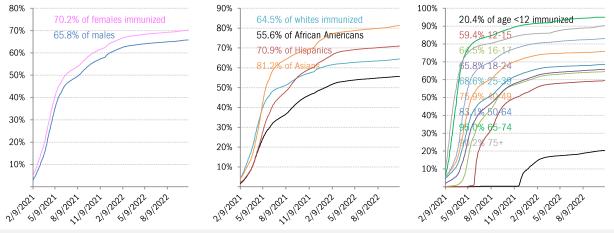
China provincial coronavirus <u>case</u> accelerometer... tracking the "zero Covid" curves *Cumulative reported cases this year, log scale: flat line indicates "zero Covid"*



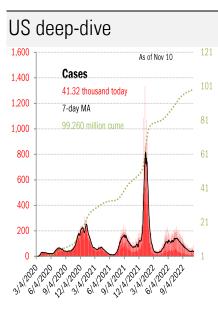


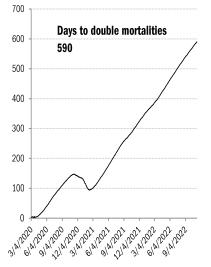
Source: Johns Hopkins, TrendMacro calculations

-										<u>Updates weekly on Friday</u>		
Administered Cumulative								day	Immunity	Full	Partial	
Doses		662,681,441						+0.815	million	US	68.5%	80.2%
						h boosters:			UK	75.2%	79.7%	
		One dose				nune	% рор	New immune today		France	78.3%	80.5%
	Total population		275,346,421		2	34,555,714	70%		million	Spain	85.5%	86.9%
-	Age 12 to 17		18,347,933			15,688,853 62%		+0.003 million		Germany	76.2%	77.7%
	Age 18 to 64		183,281,042			55,734,230 53,130,217	77%	+0.034 million		Italy	81.3%	86.1%
Age 65 and over		60,724,196		100%	100%		97%	+0.015 million		Australia	83.2%	85.7%
Other										Israel	65.2%	71.1%
3%										Canada	82.3%	88.3%
Moderna 38% Pfizer		State		Best						Japan	83.1%	84.2%
				5000						Africa	24.8%	31.0%
		At least partial immunity		Middl	•					India	67.1%	72.5%
59%		as % population		WIGO	0					Brazil	80.0%	87.0%
		Full immunity		Wors						China	89.2%	91.4%
AK		as % population		vv0ra						Global data diffe		s, timing
72.3%		"Immunity" = two doses		WI				As of Nov 11			ME	
64.7%						74.3%					95.0%	
-						67.6%		_			82.4%	
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	84.2%	63.3%	67.5%	68.5%	77.9%	78.5%	68.9%		93.4%	95.0%	86.2%	
	75.2%	56.0%	58.6%	57.9%	71.4%	70.7%	61.9%		79.8%	84.4%	70.5%	
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		-
	80.5%	78.0%	60.3%	82.3%	70.0%	63.8%	65.2%	89.2%	93.6%	95.0%		
	71.6%	62.9%	52.6%	65.3%	63.8%	57.3%	60.0%	72.1%	78.3%	82.9%		_
	CA	UT	CO	NE	MO	KY	WV	VA	MD	СТ	RI]
	85.5%	74.5%	82.7%	72.6%	68.6%	68.2%	67.0%	89.6%	90.5%	95.0%	95.0%	
	74.4%	66.1%	72.8%	65.6%	58.3%	59.1%	59.3%	75.7%	78.8%	82.2%	86.7%	
-		AZ	NM	KS	AR	TN	NC	SC	DC	DE		-
		76.3%	92.7%	75.3%	69.1%	64.0%	90.3%	70.3%	95.0%	86.6%		
		65.4%	74.2%	64.5%	56.3%	56.0%	65.8%	59.3%	83.6%	72.0%		
				OK	LA	MS	AL	GA				
				73.8%	62.5%	61.3%	64.4%	67.6%				
HI				59.8%	54.8%	53.4%	52.6%	56.7%		_		_
90.5%				TX					FL		PR	
80.8%				75.5%					81.7%		95.0%	
	-			62.7%					68.9%	JI	86.4%	
The demographics of US vaccination												



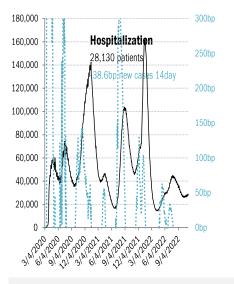
Source: CDC, CDC, Our World in Data, TrendMacro calculations

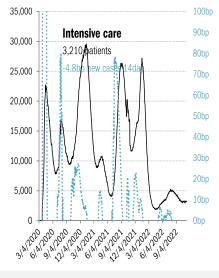


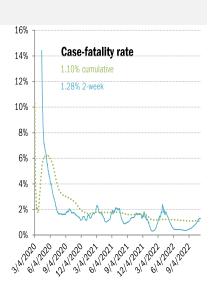


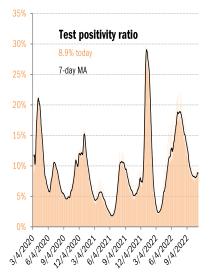


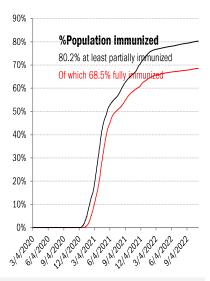




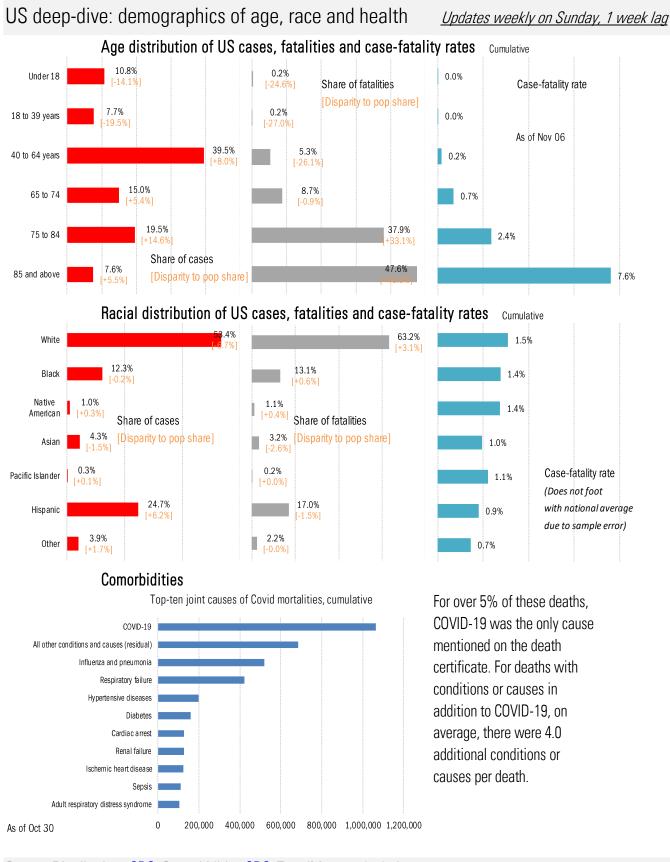








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

Recommended reading

DeSantis's COVID Gamble Paid Off

Helen Lewis *The Atlantic* November 10, 2022

Dementia Don

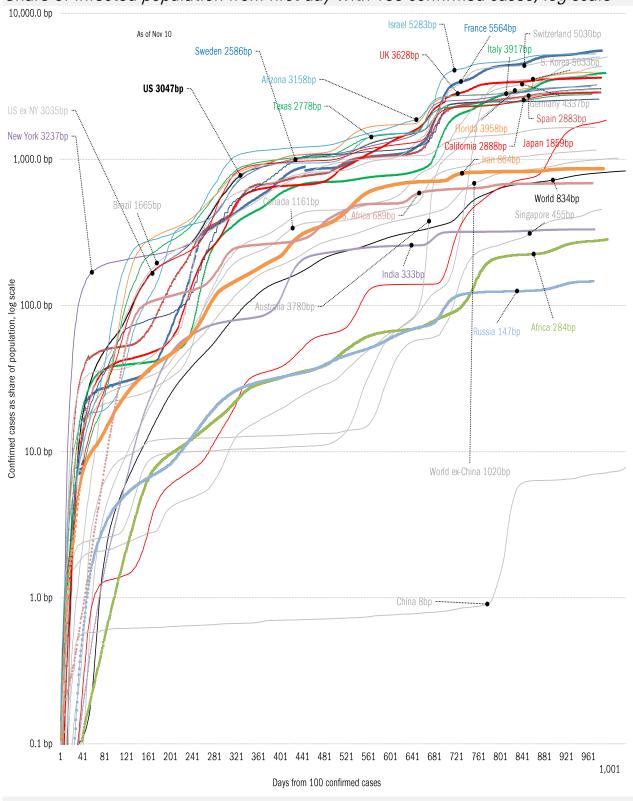
John Hinderaker *Power Line Blog* November 10, 2022

Donald Trump's Covid Attack On Ron DeSantis Will Backfire Spectacularly Phillip Klein *National Review* November 10, 2022

Meme of the day



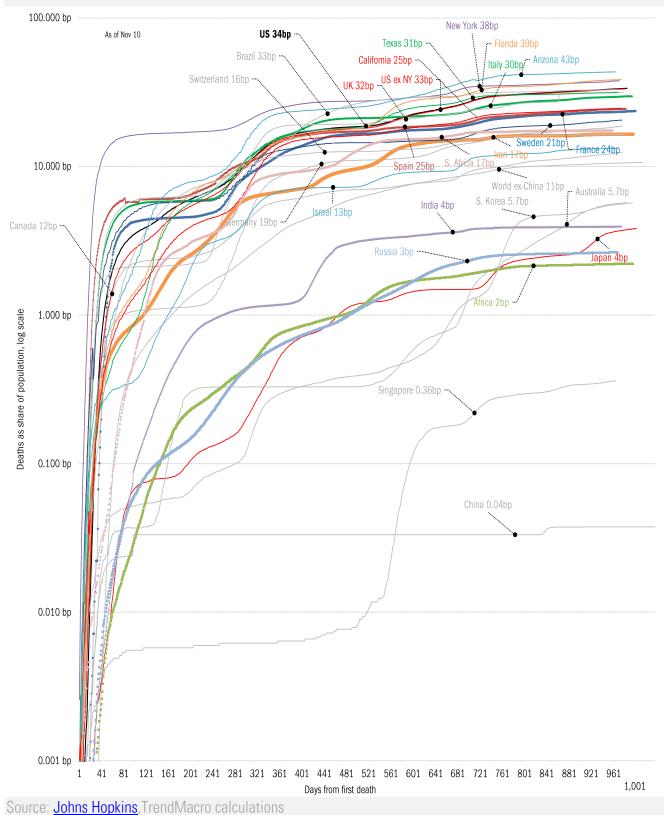
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

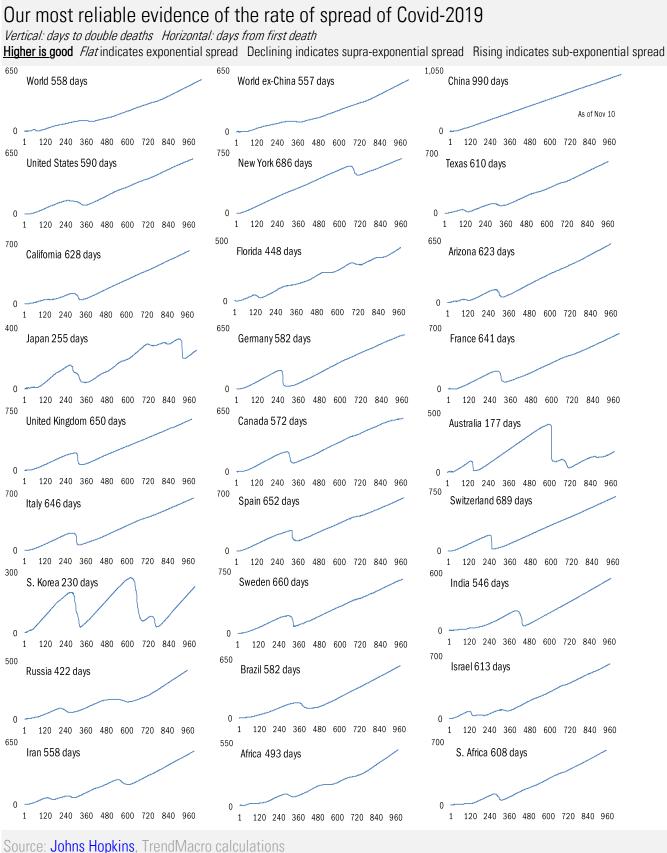


The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves *Share of infected population from first day with 100 confirmed cases, log scale*

Source: Johns Hopkins, TrendMacro calculations

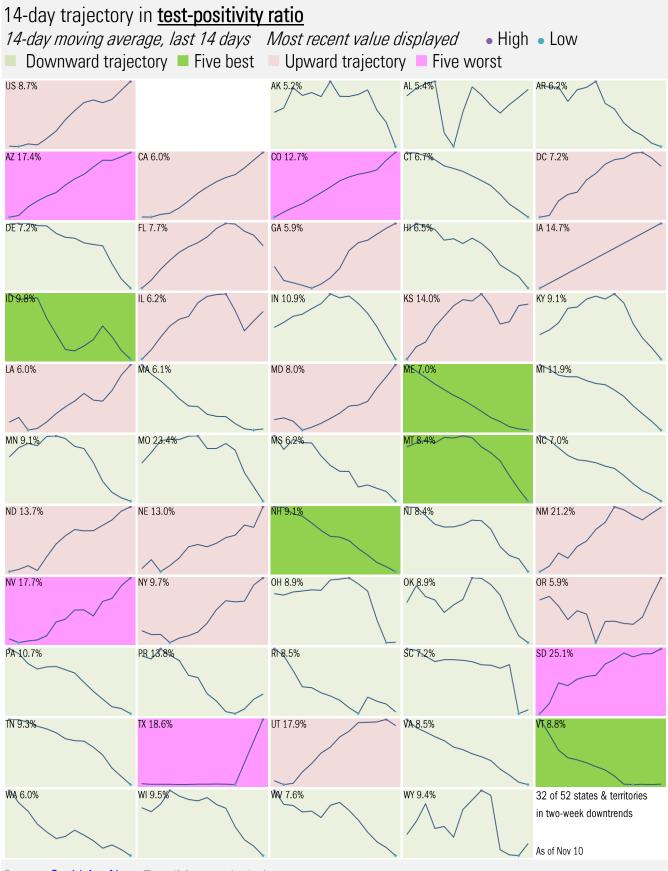
The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale*







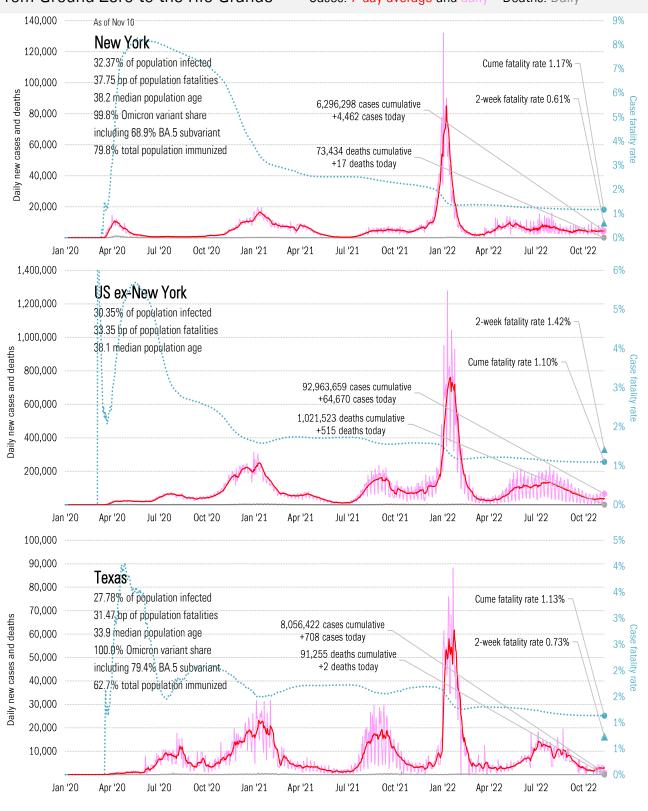
Source: Johns Hopkins, TrendMacro calculations



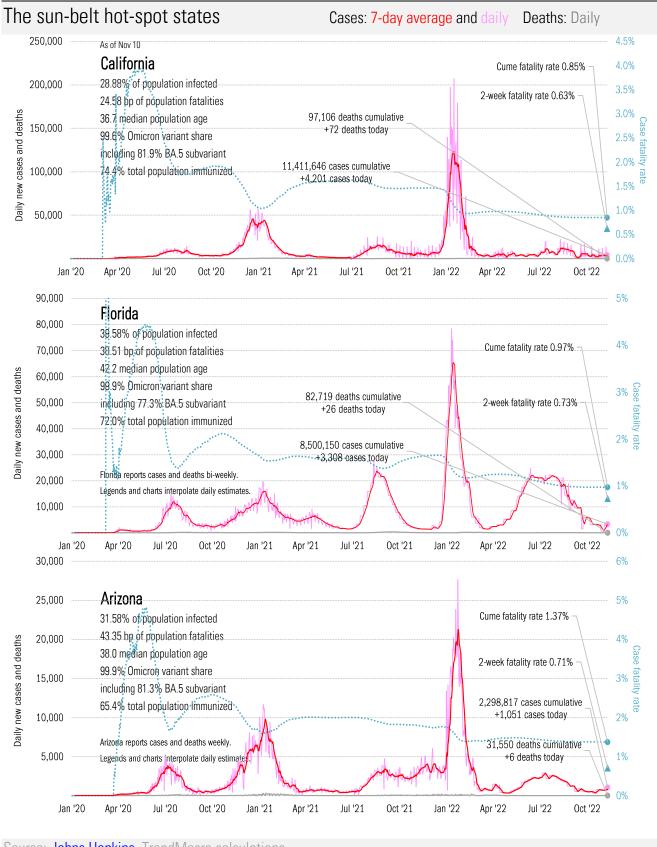
Source: Covid Act Now, TrendMacro calculations

From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



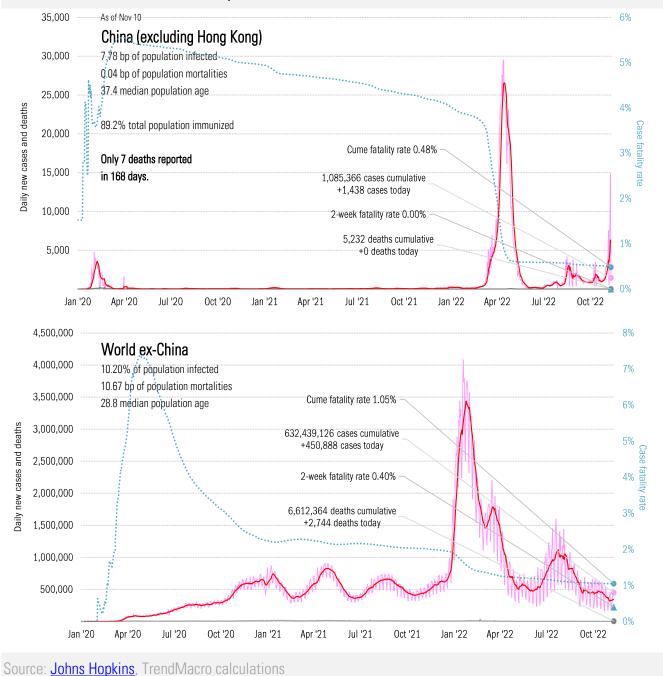
Source: Johns Hopkins, TrendMacro calculations

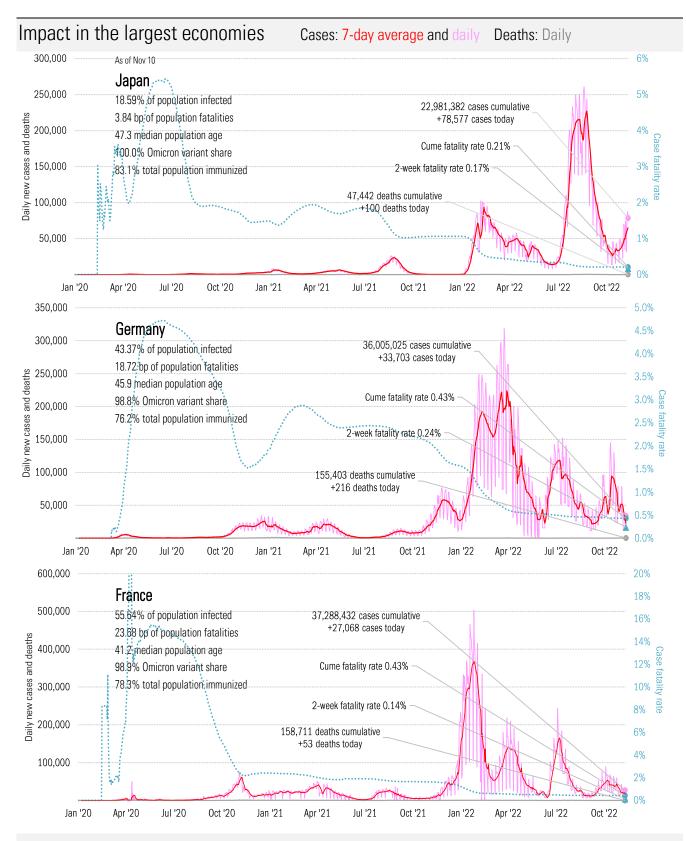


Source: Johns Hopkins, TrendMacro calculations

Patient zero... and then everyone else

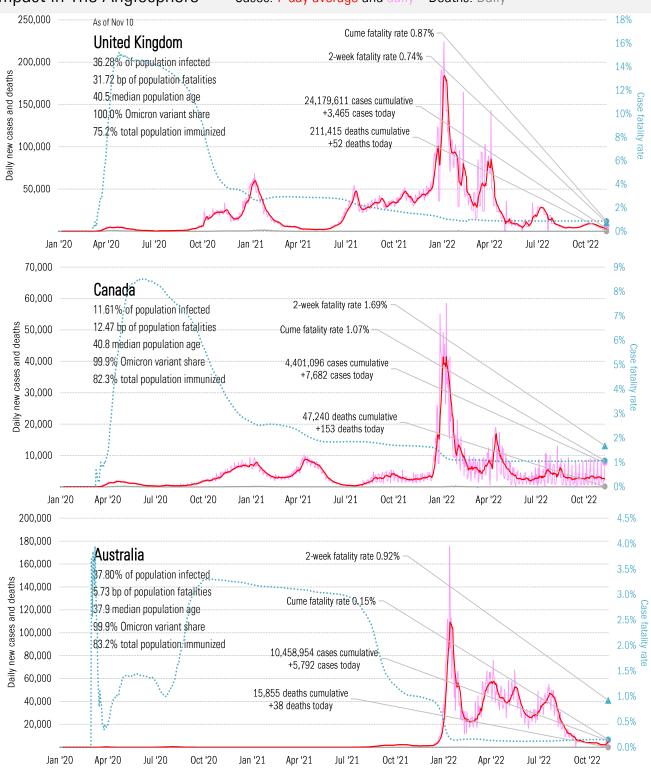
Cases: 7-day average and daily Deaths: Daily



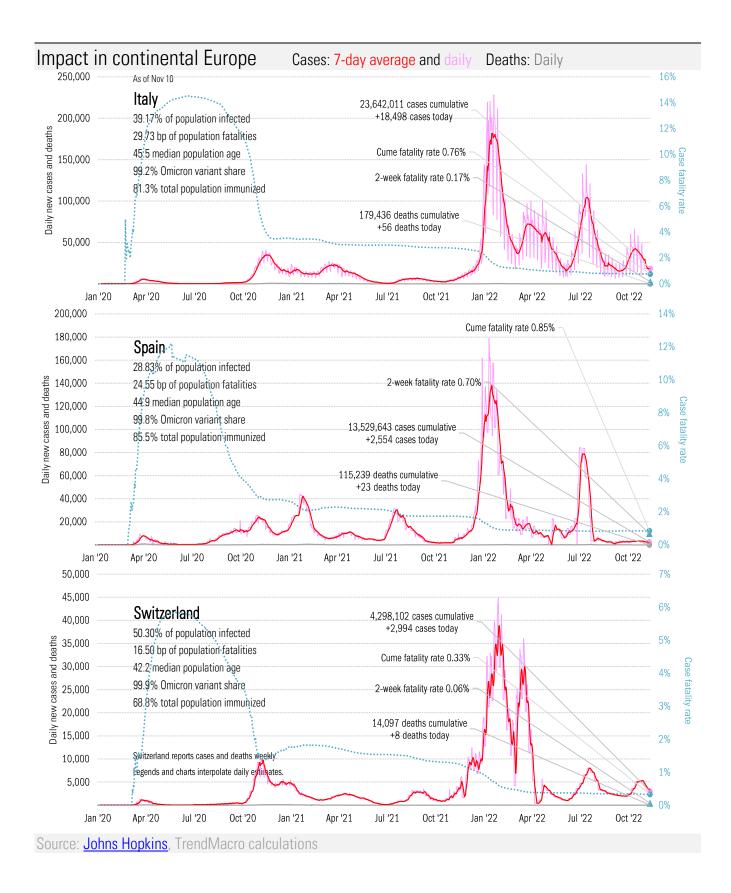


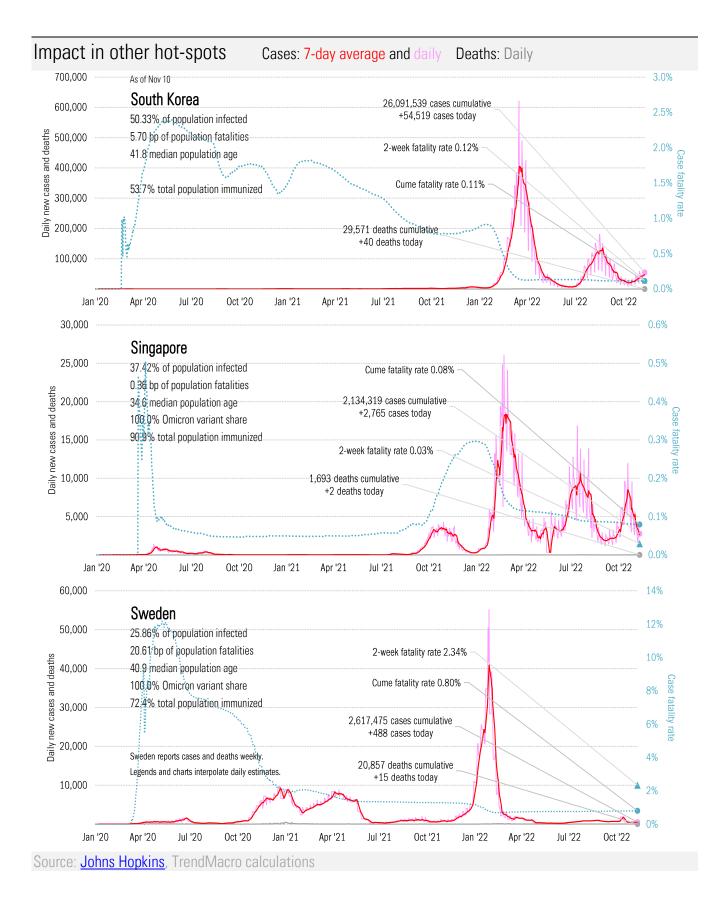
Source: Johns Hopkins, TrendMacro calculations





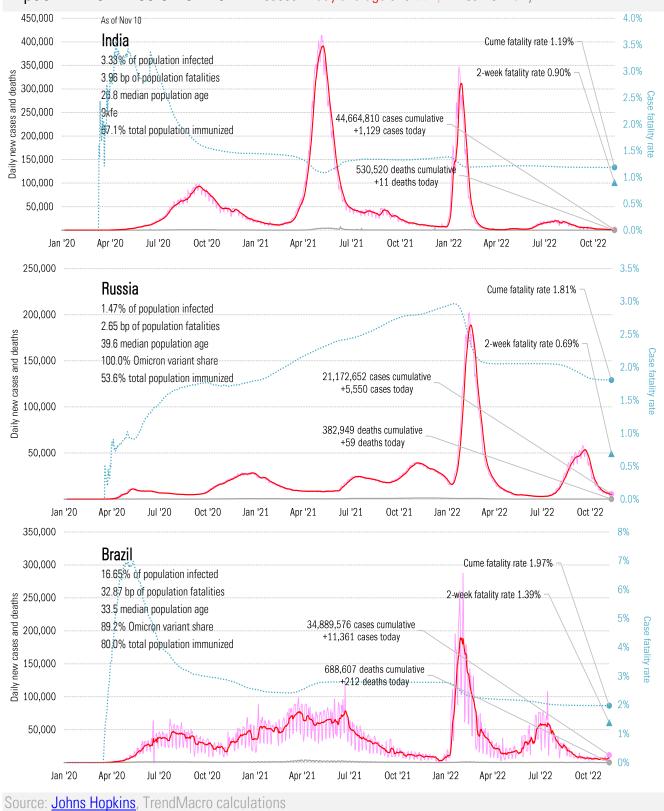
Source: Johns Hopkins, TrendMacro calculations

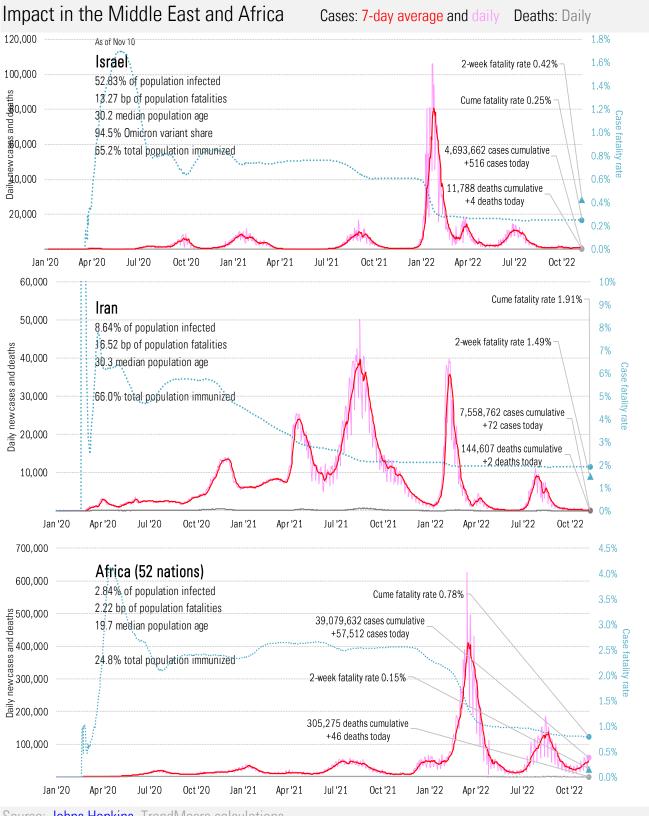




Impact in the BRICs ex-China Cases: 7-day av

Cases: 7-day average and daily Deaths: Daily





Source: Johns Hopkins, TrendMacro calculations

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

