

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

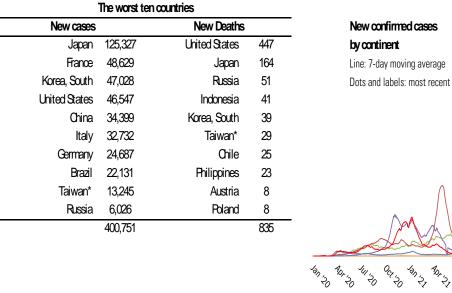
Asia

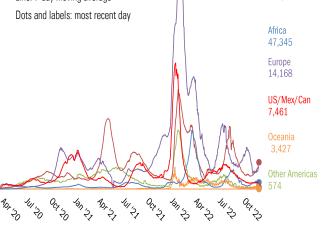
187,198

## Data Insights: Covid-2019 Monitor

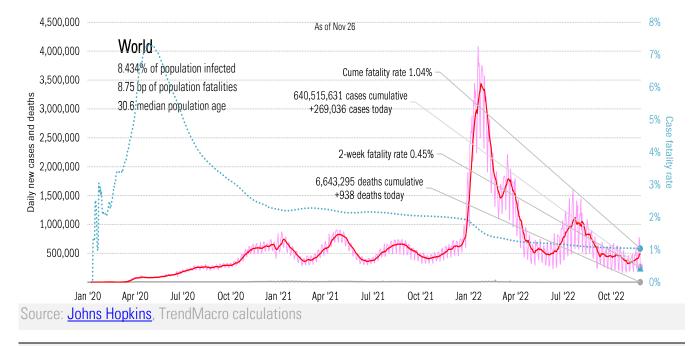
Sunday, November 27, 2022

## The global scorecard





Deaths: Daily



Cases: 7-day average and daily

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### The US scorecard Cases: 7-day average and daily Deaths: Daily The ten worst US states Cume in hospital New cases New deaths New in hospital Ourne cases **Curre deaths** Hospital use ICU use CA 6,530 48 ТΧ 249 CA 11,492,488 CA 97,437 ТΧ 555,264 MN 87% NM 86% Æ ТΧ 4.901 MI 39 CA 459 TX 8.084.617 TΧ 91.380 CA 517,323 R 86% TX 84% Æ 3,355 28 102 7,239,478 Æ 503,468 VA IN FL. Æ 82,875 WA 83% AK 83% IL 2,711 NV 24 ΤN 68 NY 6,354,911 NY 73,803 NY 319,358 MA 82% NH 83% NC 80% Ø 2,154 CA 21 GA 104 IL 3,860,866 PA 48,271 GA 229,796 CA 81% UT NY VA 1,916 21 344 PA 3,350,067 GA 41,024 СН 227,355 MO 80% AL 79% ΑZ 1,916 PA 21 СН 178 NC 3,268,501 40,466 PA 213,668 NH 79% VΤ 79% а KY 1,834 NY 16 NE 36 СН 3.227.759 IL 40.247 IL 195.380 NV 78% DC 79% СН 1,571 WI KS 35 GA 2,937,280 MI 39,972 MI 169,969 R 16 AZ 78% 78% NJ 1,504 MA 16 LA 65 MI 2,929,612 NJ 35,079 KY 147,747 OR 78% MA 78% 590,554 3,079,328 28,392 249 1,640 52,745,579 46,547 447 3,663 All states 99,874,966 1,103,008 5,594,133 All states 70% 67% All states Topten 61% 56% 45% Top ten 53% 55% 55% Median 74% 71% Some states not reporting Five most improved US states Fewer daily cases Fewer new deaths Fewer new hospitalizations NY -914 Ø -56 Improvement stats are AK 0 IL -37 impaired on weekends AL 0 AZ -28 due to under-reporting. ΑZ 0 Æ -28 CA 0 MN -26 HZ υ 1,600,000 12% As of Nov 26 1,400,000 United States 10% 2-week fatality rate 1.22% 30.66% of population infected 1,200,000 33.86 bp of population fatalities 38.1 median population age 8% Daily new cases and deaths Cume fatality rate 1.10% 1,000,000 99.9% Omicron variant share Case 68.8% total population immunized fatality rate 800,000 6% 99,874,966 cases cumulative +46,547 cases today 600,000 4%

1,103,008 deaths cumulative

+447 deaths today

Jul '21

Oct '21

Jan '22

Jul '22

Oct '22

Apr '22

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

Apr '21

Jan '21

Oct '20

Apr '20

Jul '20

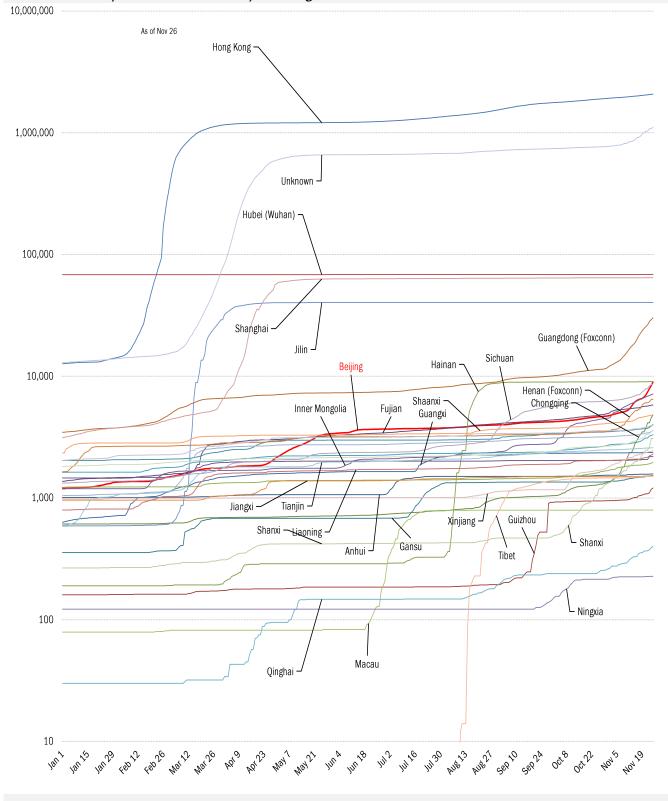
400,000

200,000

Jan '20

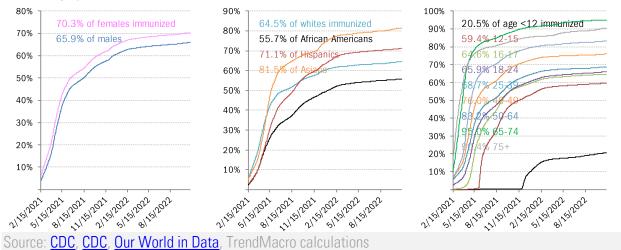
2%

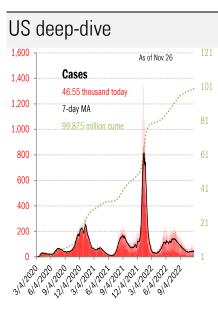
**China provincial** coronavirus <u>case</u> accelerometer... tracking the "zero Covid" curves *Cumulative reported cases this year, log scale: flat line indicates "zero Covid"* 

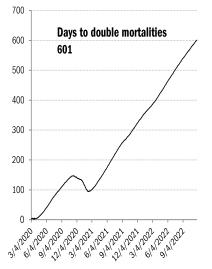


Rolling out the vaccines in the US and the world <u>Updates weekly on Friday</u>												
Administered Cumulative						То	Today		Full	Partial		
Doses 6		66	7,039,757					+0.623	million	US	68.6%	80.4%
						Of which boost				UK	75.2%	79.7%
		One	dose	<u>% Pop</u> 83%	lmn	nune		New imm	une toda <sup>,</sup>	France	78.3%	80.5%
	Total population		275,804,550			234,917,605		70% +0.052 million		Spain	85.5%	86.9%
-	-		8,368,587 73%		15,705,157		62% 77%	+0.002 million		Germany	76.2%	77.7%
Age 18 to 64			3,557,662	90% 100%	15	155,937,514		+0.029 million		Italy	81.3%	86.1%
Age 65 and over		6	60,811,399		5	53,206,659	97%	+0.011	million	Australia	83.2%	85.7%
Other										Israel	65.2%	71.1%
3%		State		Best						Canada	82.4%	88.8%
Moderna										Japan	83.1%	84.2%
38%										Africa	24.8%	31.0%
00,0	Pfizer	At least partial immunity		Middle						India	67.1%	72.5%
	59%	as % population								Brazil	80.2%	87.2%
		Full immunity		Worst					China	89.2%	91.4%	
AK 72.4%		as % population					,			Global data diff		rces, timing
		"Immunity" = two doses				WI	As of Nov 18				ME	
64.7%					74.4%					95.0%		
·					67.7%					82.5%		
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	84.4%	63.4%	67.7%	68.6%	78.0%	78.7%	69.0%		93.5%	95.0%	86.3%	
	75.3%	56.0%	58.7%	58.0%	71.5%	70.8%	61.9%		79.9%	84.6%	70.5%	
	OR	NV	WY	SD	IA	IN	ОН	PA	NJ	MA		
	80.7%	78.1%	60.4%	82.6%	70.1%	63.9%	65.2%	89.4%	93.7%	95.0%		
	71.7%	63.0%	52.7%	65.5%	63.9%	57.4%	60.0%	72.3%	78.4%	83.1%		T
	CA	UT	CO	NE	MO	KY	WV	VA	MD	СТ	RI	
	85.7%	74.5%	82.9%	72.7%	68.7%	68.3%	67.0%	89.9%	90.7%	95.0%	95.0%	
	74.6%	66.1%	72.9%	65.7%	58.5%	59.2%	59.4%	75.9%	78.9%	82.3%	86.8%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		
		76.5%	92.9%	75.4%	69.2%	64.0%	90.5%	70.3%	95.0%	86.6%		
		65.5%	74.4%	64.6%	56.4%	56.0%	66.0%	59.4%	84.1%	72.0%		
				OK	LA	MS	AL	GA				
				73.9%	62.5%	61.3%	64.5%	67.7%				
HI				59.9%	54.8%	53.4%	52.7%	56.7%	L	, r		T
90.6%				ΤX					FL		PR	
80.9%				75.6%					81.8%		95.0%	
				62.8%	ļ				68.9%	J I	86.5%	

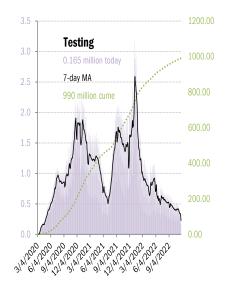
### The demographics of US vaccination

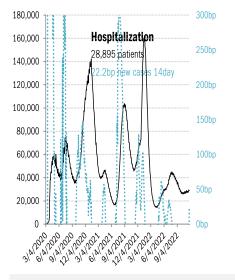


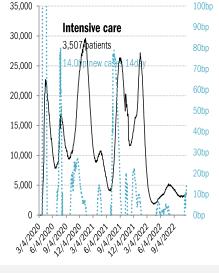


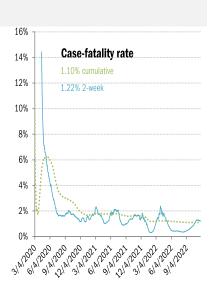


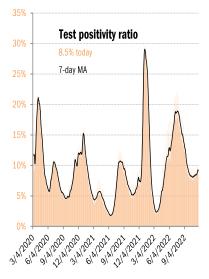


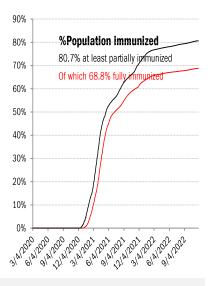




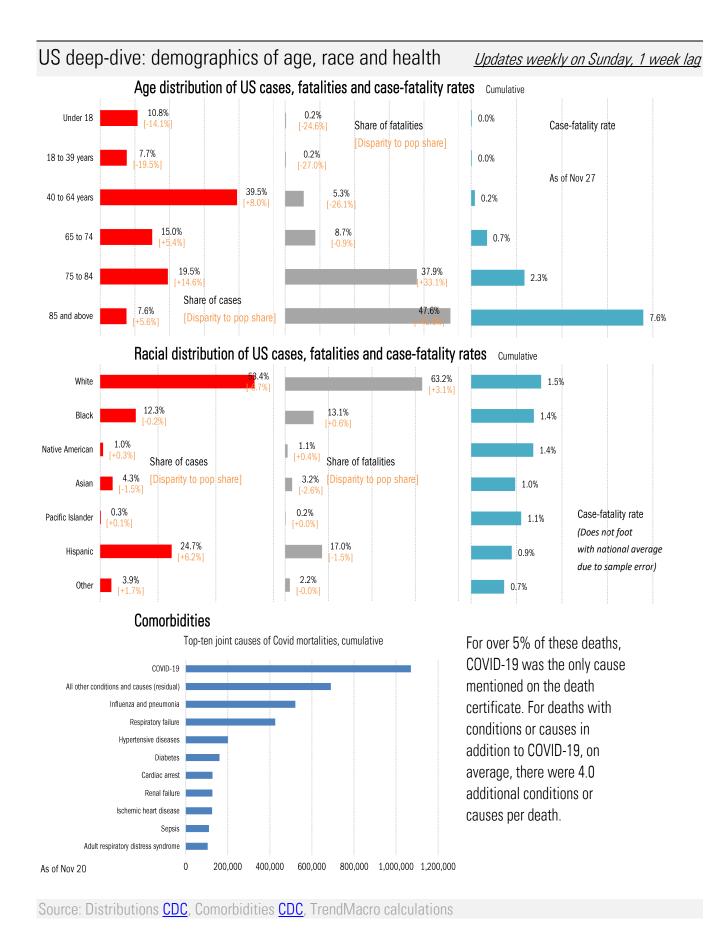








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



# **Recommended Reading**

<u>Chinese Protests Spread Over Government's Covid</u> <u>Restrictions</u> Lingling Wei and Wenxin Fan

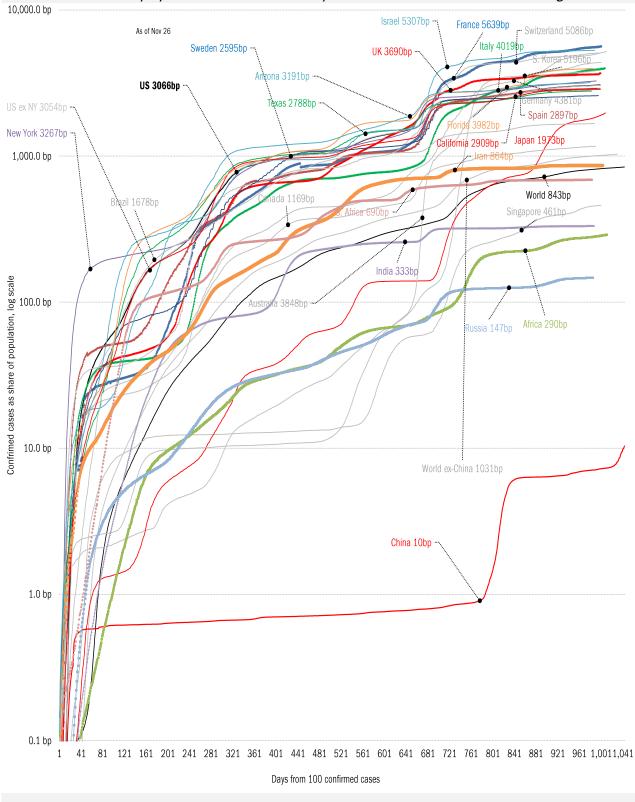
*Wall Street Journal* November 26, 2022 Deadly Xinjiang fire stokes discontent over China's covid restrictions Christian Shepherd and Lily Kuo *Washington Post* November 26, 2022

## Meme of the Day

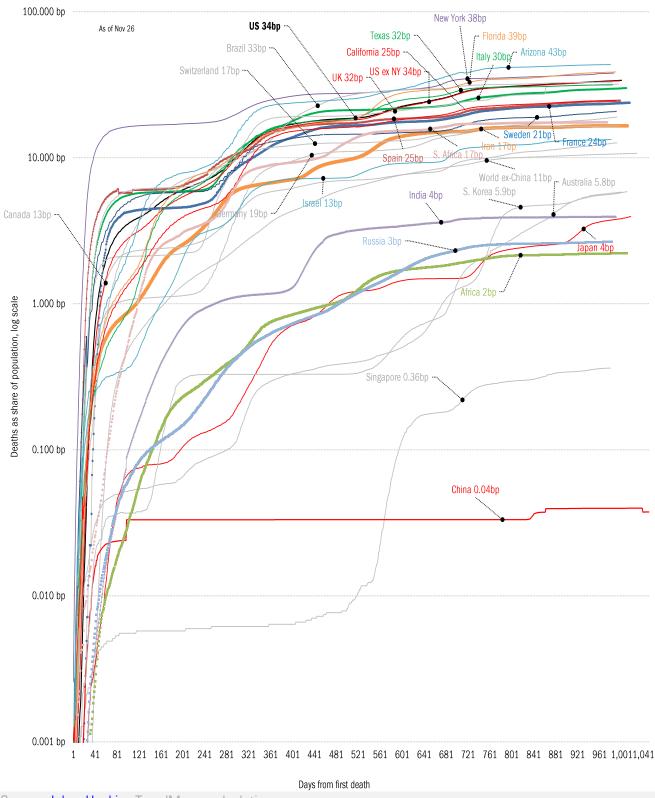


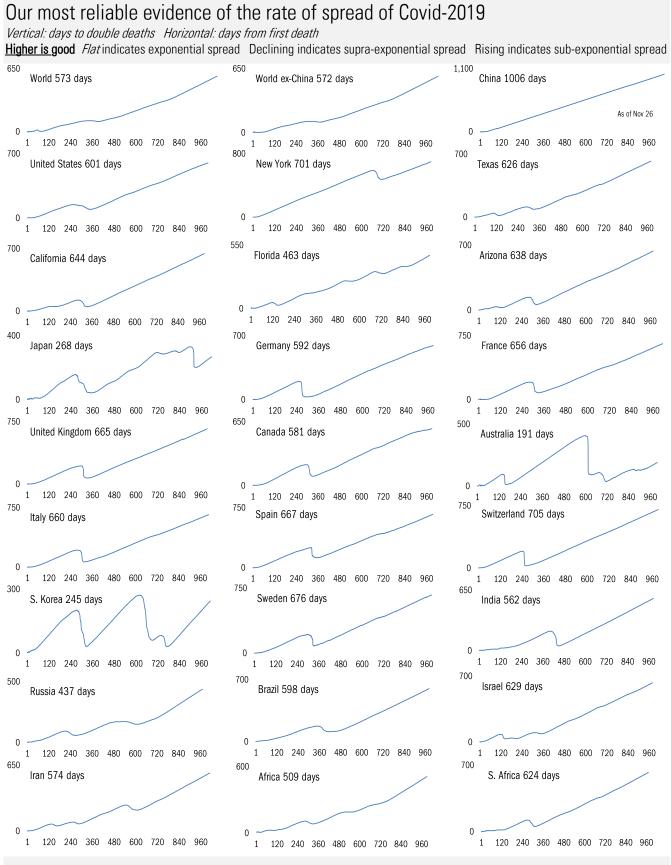
Source: Our beloved clients, **Power Line blog "The Week in Pictures"** and **CTUP** 

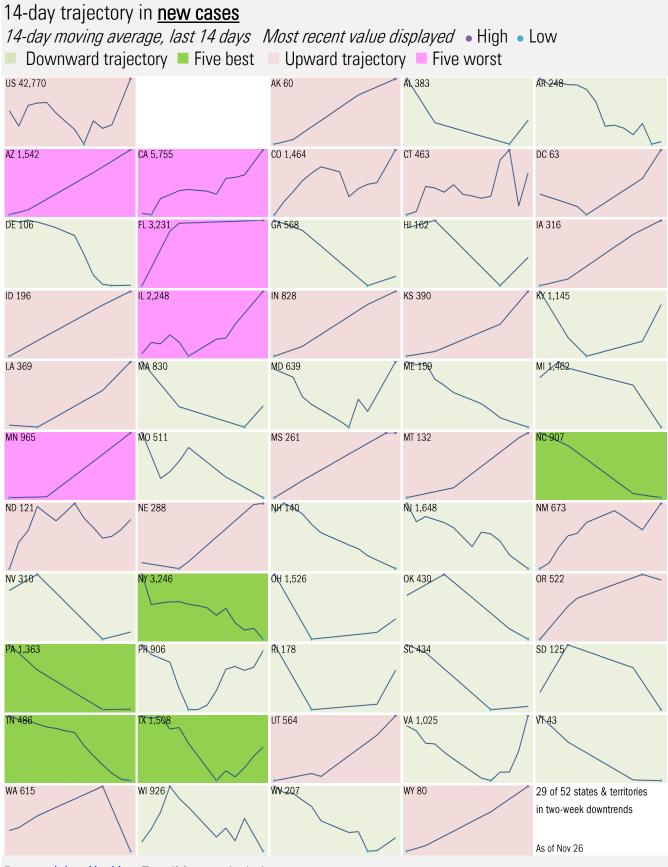
# The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves Share of infected population from first day with 100 confirmed cases, log scale



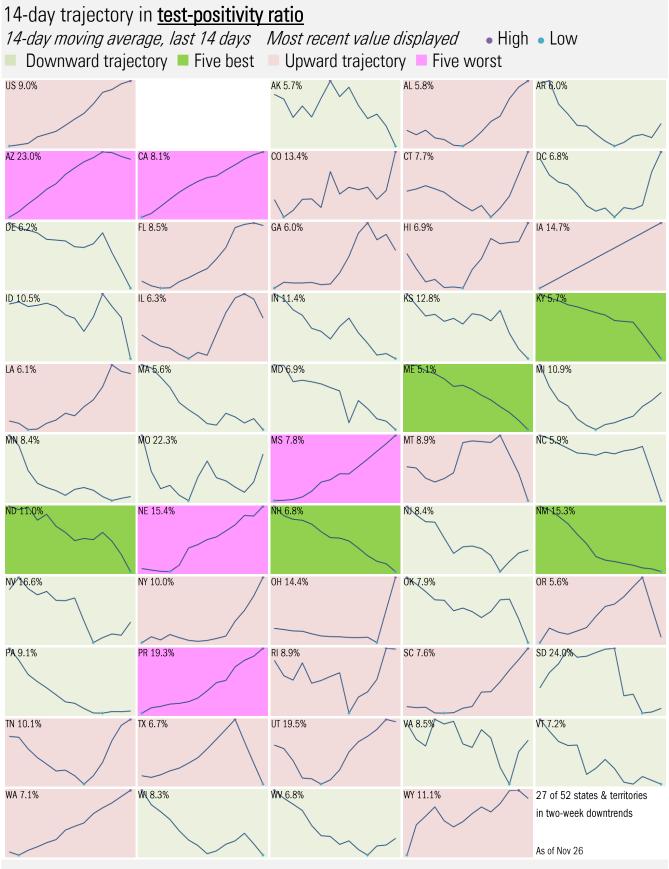
The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of deceased population from day of first fatality, log scale* 







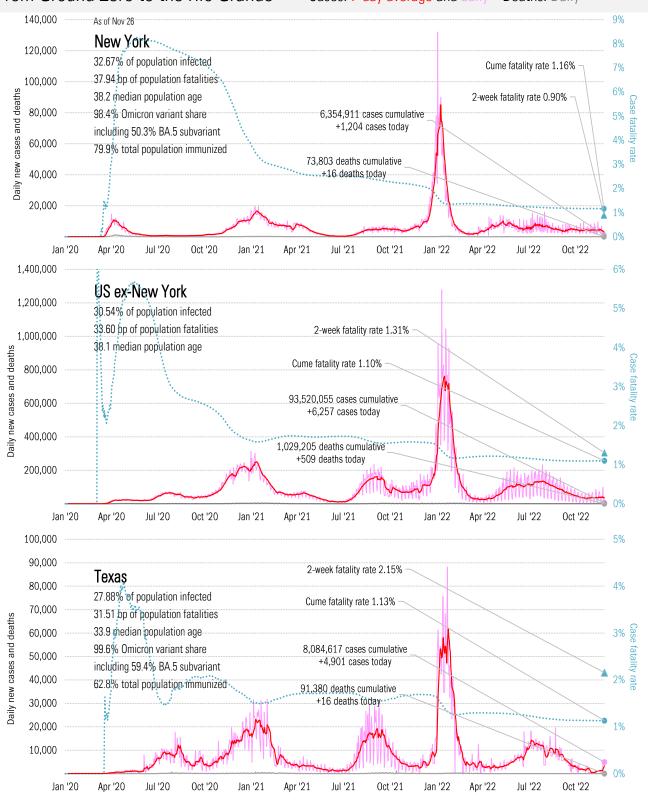
Source: Johns Hopkins, TrendMacro calculations



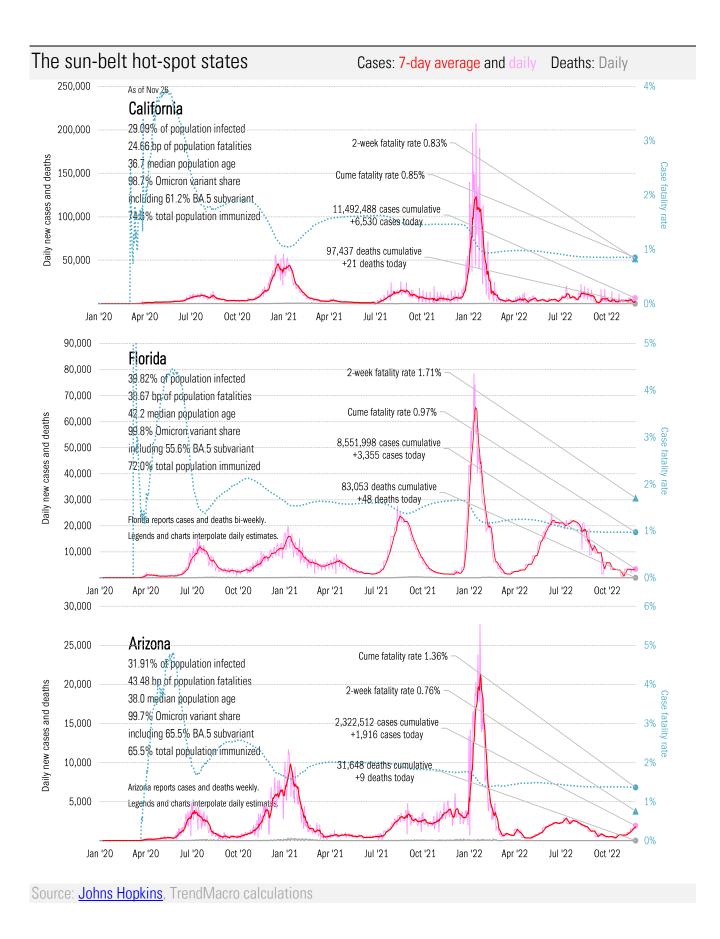
Source: Covid Act Now, TrendMacro calculations

From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily

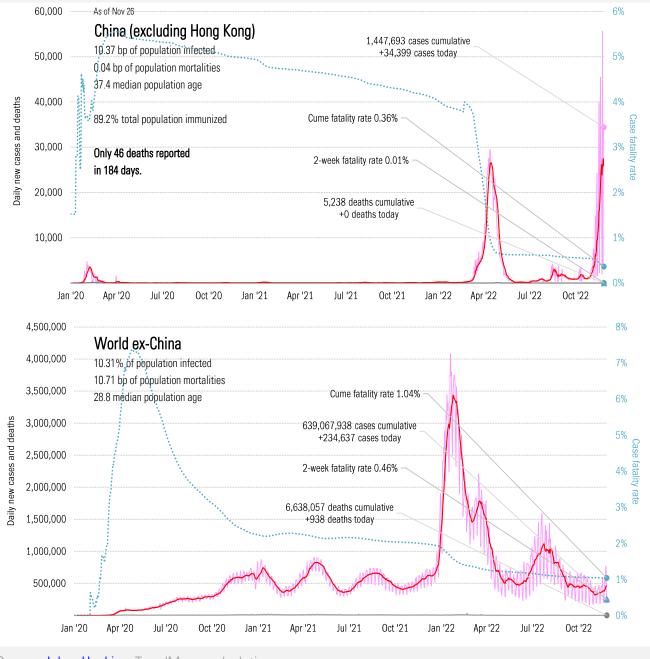


Source: Johns Hopkins, TrendMacro calculations

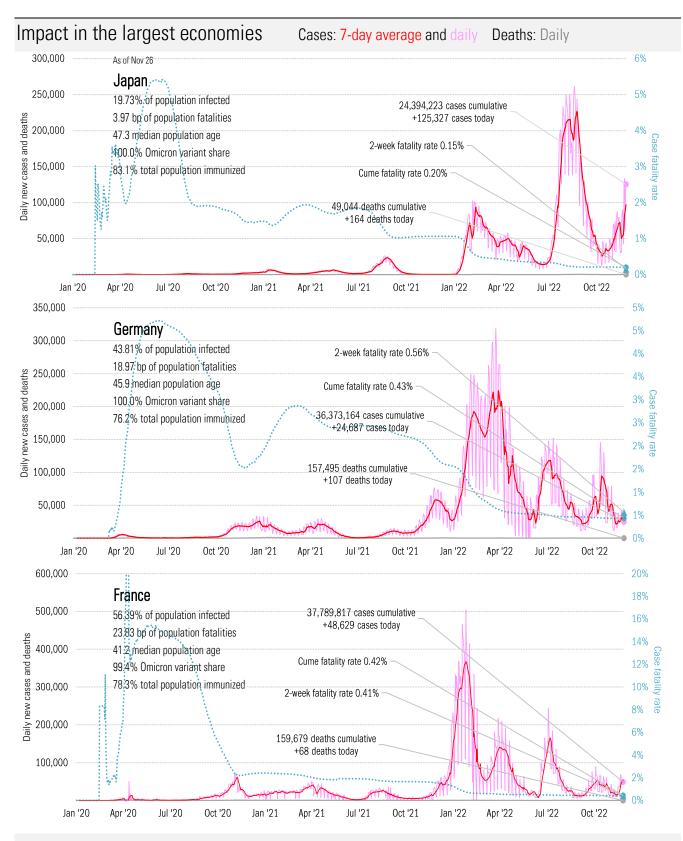


Patient zero... and then everyone else

Cases: 7-day average and daily Deaths: Daily

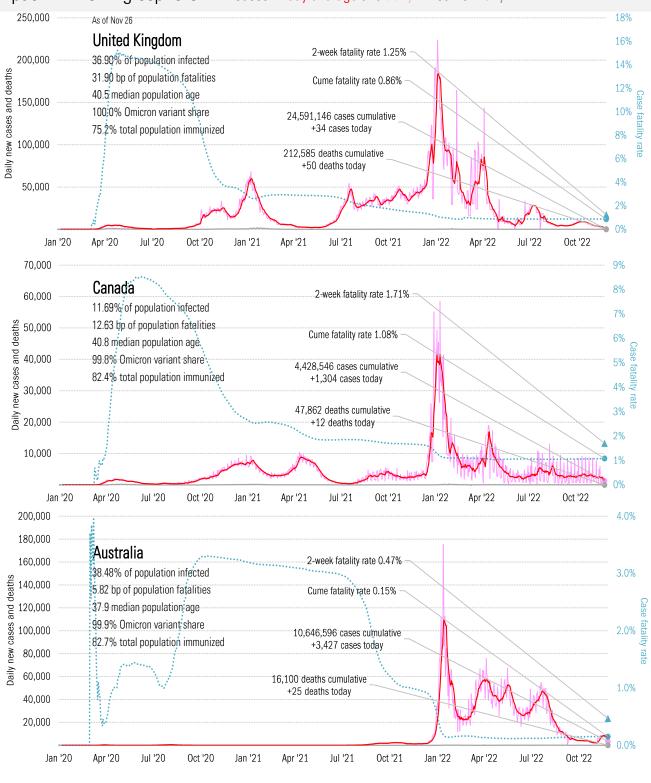


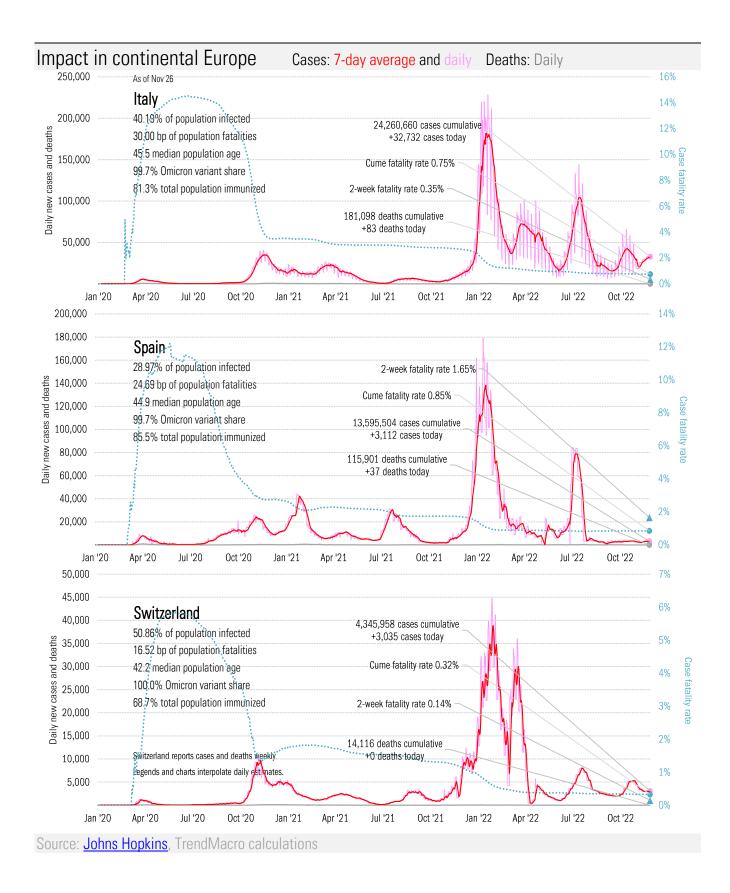
Source: Johns Hopkins, TrendMacro calculations

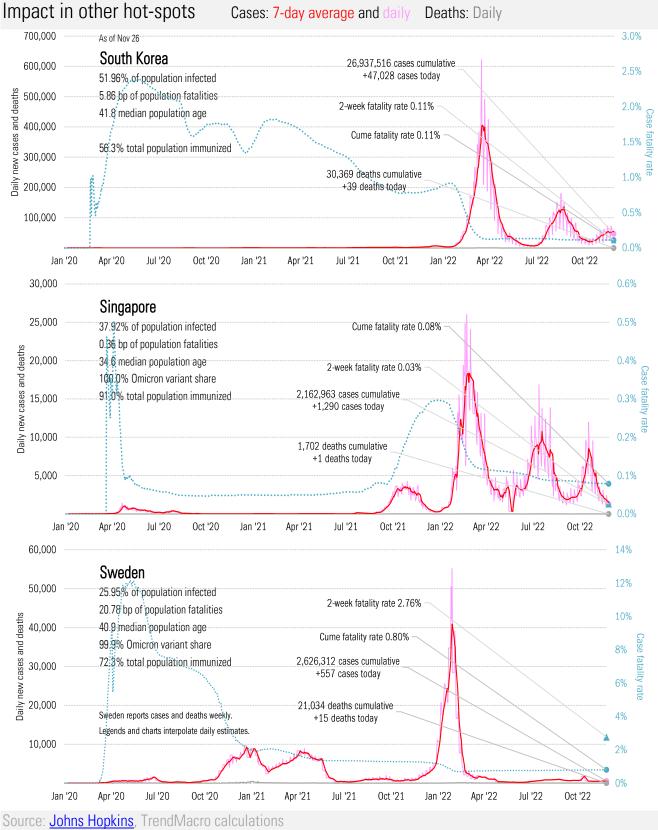


Source: Johns Hopkins, TrendMacro calculations

Impact in The Anglosphere Cases: 7-day average and daily Deaths: Daily

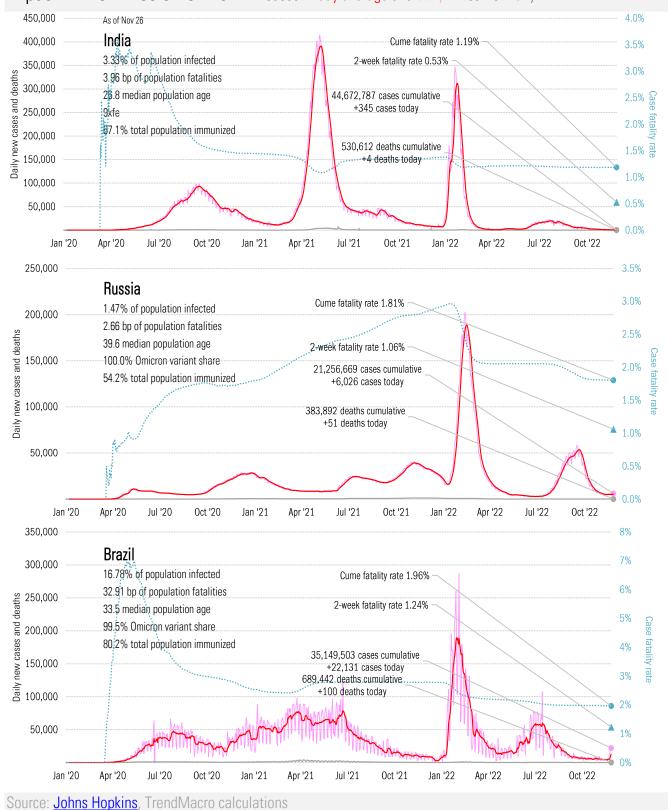


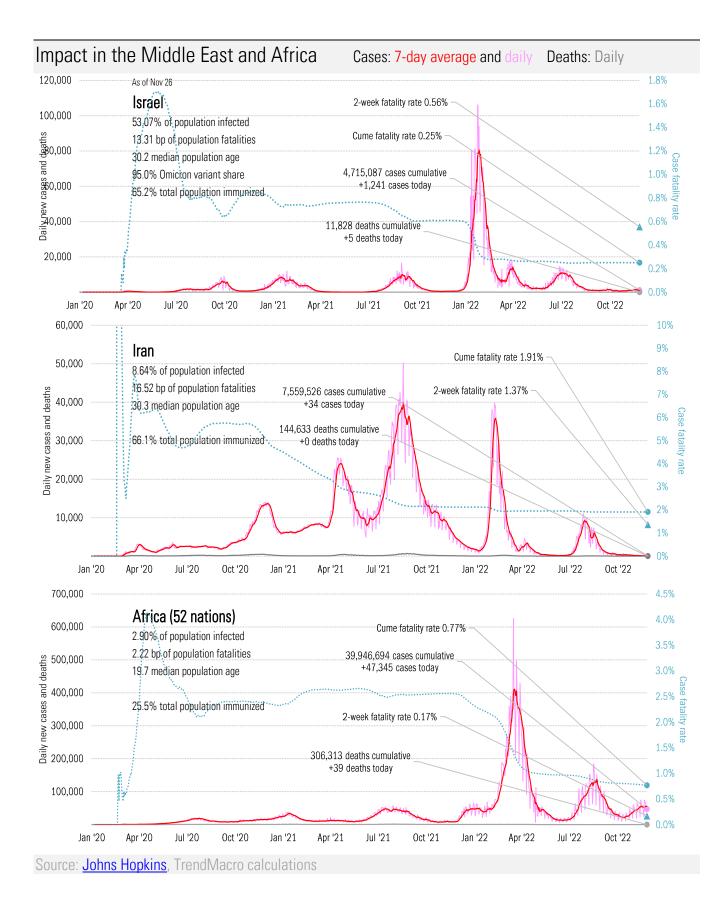




Impact in the BRICs ex-China Cases: 7-day average and daily

and daily Deaths: Daily





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

