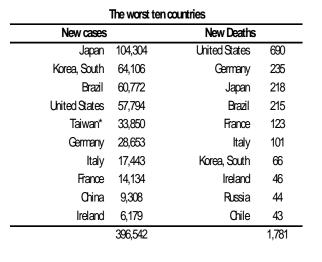


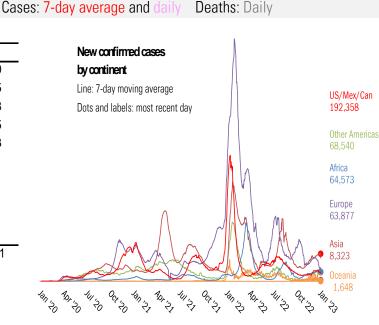
Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

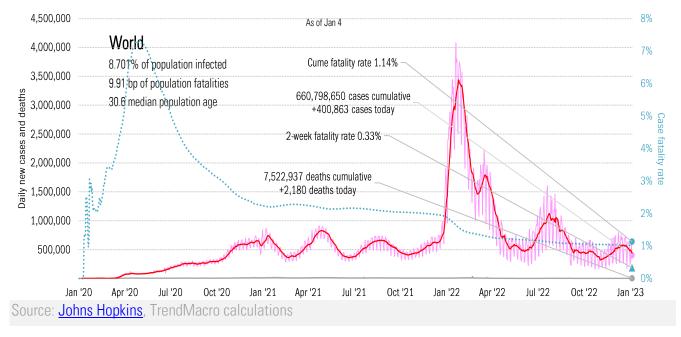
Data Insights: Covid-2019 Monitor

Thursday, January 5, 2023

The global scorecard







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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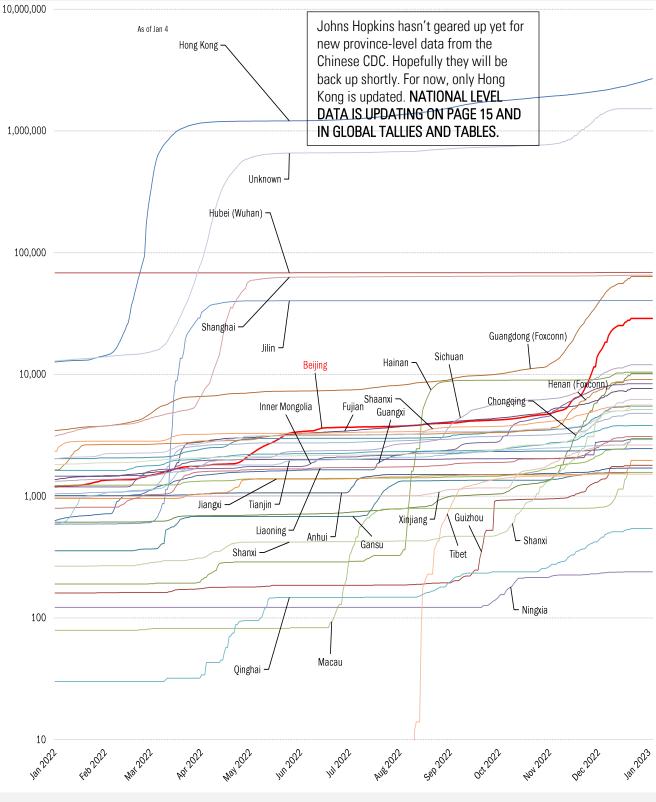
The US scorecard

Cases: 7-day average and daily Deaths: Daily

The ten worst US states															
New cases New deaths				Newinh	-				Quine deaths Quine in hospital			Hospital use ICU			Uuse
TX	4,757	NY	119	GA	296		11,838,628	CA	98,735	TX	571,321		86%		92%
NJ	3,931	GA	103	TX	650	TX		TX	91,939	CA	544,950	AK			90%
NY FL	3,890 2,640	IN FL	96 42		214 70		7,338,503	FL NV	83,906 75 220	FL NV	515,899 227,526	WA		NM	88% ‱/
MD	3,649 3,427	г. CA	43 39	AR FL	70 466	NY IL	6,596,319 3,974,859	NY PA	75,330 49,034	NY CH	337,526 236,825	RI MO	84% 84%		88% 88%
NC	3,070	MD	33	LA	400 85	PA	3,431,861	GA	41,520	GA	235,634	W			87%
CA	2,226	W	28	MT	18	NC		сн	40,928	PA	221,444	NC			87%
PA	2,145	NJ	24	AS	0	CH		MI	40,836	L	205,099	MA		MA	86%
VA	2,108	CT	22	GJ	0	GA		IL	40,702	MI	175,701	DC		R	86%
CT	2,106	PA	20	MP	0	MI	2,998,447	NJ	35,555	NJ	154,267	MN	82%	MO	85%
	31,308		527		1,799		54,107,024		598,485		3,198,666				
All states	57,794		690		6,195	All states	102,445,2	200	1,122,430		5,804,401	All states	70%		67%
Topten	54%		76%		29%	Topten	54%	_00	55%		55%	Median			79%
iop ton	0170		10/0		2070	iop torr	01/0			ne states n	ot reporting	Inicalan	10/0		10/0
Five most improved US states															
Fewer daily cases Fewer new deaths Fewer new hospitalizations															
NY	-10,533				IL	-24			CA -	279					
CA	-4,677				CA	-20				137					
WV	-851				ω					127					
NH	-734				VA	-2				110					
NM	-574				MS	-2			VA -	108					1000
1,600,000															12%
	As of J	Jan 4													
1,400,000	1141	4. J 04.4													4.00/
	United States											10%			
1,200,000	31,45% of population intected														
	34.46 bp of population fatalities												00/		
st 1,000,000	38.1 median population age 99.8% Omicron variant share 2-week fatality rate 0.74% –											8%			
gteath 1,000,000		99 8% Omicron variant share 2-week fatality rate 0.74% - 69 0% total population immunized											Ca		
<i>'</i>	03.07			nunizeu											Case fa
800,000			N.							A					6% atality
Neu										10	2,445,209 ca +57,794 ca	ses cumulative			tality rate
D00,000			\sim									1000 1000 y		\	
-														$\langle \rangle$	4%
400,000			**.	·····						11	1,122,430 d	leaths cumulativ	, /		
					Ц							leaths today			00/
200,000		¥			m						al	يتلقن با			2%
_00,000					MIN	\mathbf{N}	d	m							
		<u> </u>	~~~	A Construction of the second s		, Marthelith	\checkmark	עניים	MHMY!!'	'N	االههبب		HARANA	AAAA	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 Jan '23															

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

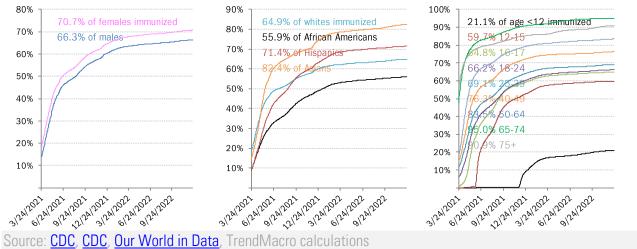
China provincial coronavirus <u>case</u> accelerometer... tracking the "zero Covid" curves *Cumulative reported cases this year, log scale: flat line indicates "zero Covid"*



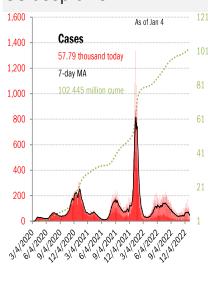
Source: Johns Hopkins, TrendMacro calculations

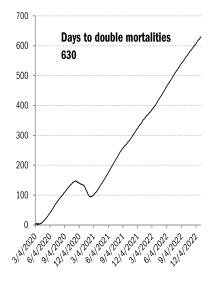
Rolling out the vaccines in the US and the world <u>Updates weekly on Friday</u>												
Administered Cumulative							То	day	Immunity	Full	Partial	
Doses		68	0,393,511					+0.244	million	US	69.0%	80.8%
				Of which bo			n boosters:	poosters: +0.214 million			75.2%	79.7%
		One dose				nune	% рор	New imm	ew immune today		78.4%	80.6%
Total popu	lation	276,758,611		83% 73%	23	235,944,128		71% +0.021		Spain	85.5%	86.9%
-	Age 12 to 17		18,413,123		1	15,763,488		62% +0.001		Germany	76.2%	77.8%
Age 18 to 64		184,058,504		90% 100%	15	156,476,533		% +0.013 million % +0.004 million		Italy	81.3%	86.2%
Age 65 a	Age 65 and over		60,960,848		5	53,388,685		+0.004 million		Australia	82.7%	84.9%
Othe											65.2%	71.1%
3%					_						82.5%	90.0%
Moderna 38% Pfizer 59%		Sta	ate	Best						Japan	83.2%	84.3%
				2000						Africa	27.5%	33.5%
			tial immunity	Midd	le					India	67.1%	72.5%
		as % po		101100						Brazil China	81.2%	87.6%
		Full im	-	Wors	et						89.4%	91.7%
AK 72.8%			pulation							Global data diff		rces, timing
		"Immunity" = tv	vo doses			WI		As of Dec 30			ME	
64.9%						74.9%					95.0%	
						68.0%		1			83.0%	
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	84.9%	63.7%	68.0%	69.1%	78.5%	78.9%	69.3%		94.1%	95.0%	87.5%	
	75.7%	56.3%	59.0%	58.4%	71.9%	71.0%	62.2%		80.5%	85.3%	71.5%	l
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		
	81.2%	77.3%	60.7%	83.4%	70.4%	64.2%	65.5%	90.1%	94.3%	95.0%		
	72.1% CA	63.5% UT	52.9%	66.0% NE	64.2% M0	57.6% KY	60.3% WV	72.9% VA	78.8%	83.8% CT	RI	1
			CO						MD			
	84.3%	75.0%	83.3%	73.1%	69.1%	68.6%	67.3%	90.6%	91.3%	95.0%	95.0%	
_	74.4%	66.5% AZ	73.2% NM	66.0% KS	<u>58.8%</u> AR	<u>59.4%</u> TN	59.6% NC	76.3% SC	79.4% DC	82.8% DE	87.4%	1
		77.1%	93.8%	75.9%	69.6%	64.3%	91.6%	70.7%	95.0%	87.7%		
		65.8%			56.7%	64.3% 56.2%			95.0% 85.3%			
		00.0%	74.9%	65.0% OK	LA	00.2% MS	66.8% AL	59.7% GA	80.3%	72.9%		
				74.3%	62.7%			68.1%				
HI						61.5% 52.6%	64.8% 53.0%					
91.1%				60.2% TX	54.9%	53.6%	05.0%	57.1%	FL	1 1	PR	1
81.3%				76.0%					FL 82.1%		95.0%	
01.370												
				63.0%					69.2%		86.7%	J

The demographics of US vaccination



US deep-dive







1022 012 022 022 022 022 022 022

5.0

4.5

4.0

3.5

3.0

2.5 2.0

1.5

1.0

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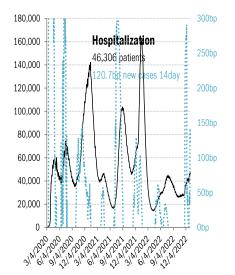
· 9/A/2020

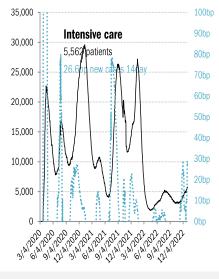
Fatalities

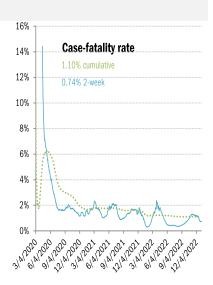
7-day MA

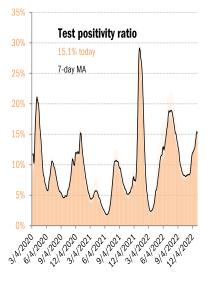
0.69 thousand today

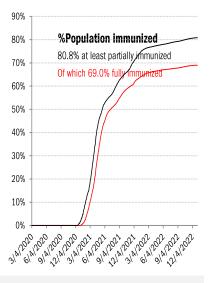
0.8



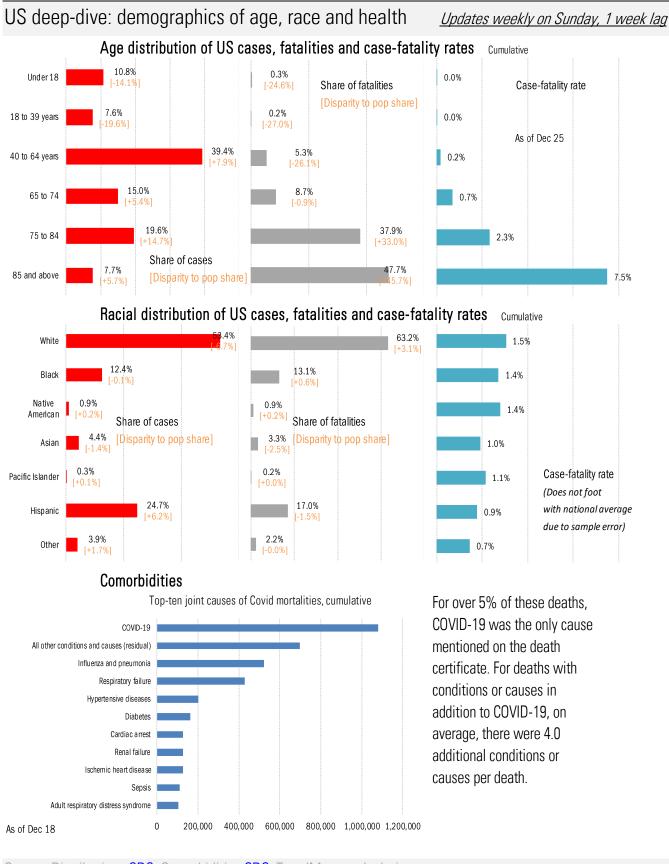








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

Recommended reading

COVID-positive Chinese tourist goes on the run in

South Korea

Jen Kwon *CBS News* January 4, 2023

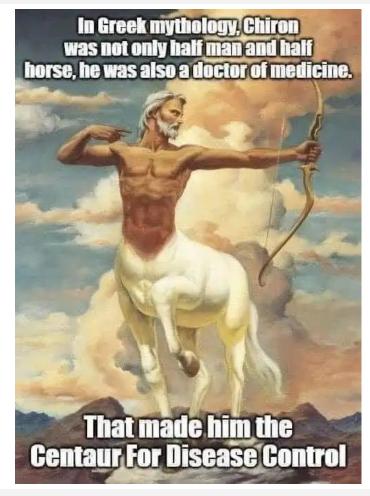
<u>China Covid: Celebrity deaths spark fears over death</u> toll

Fan Wang BBC January 5, 2023

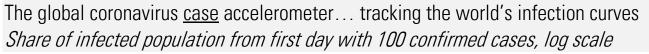
Meme of the Day

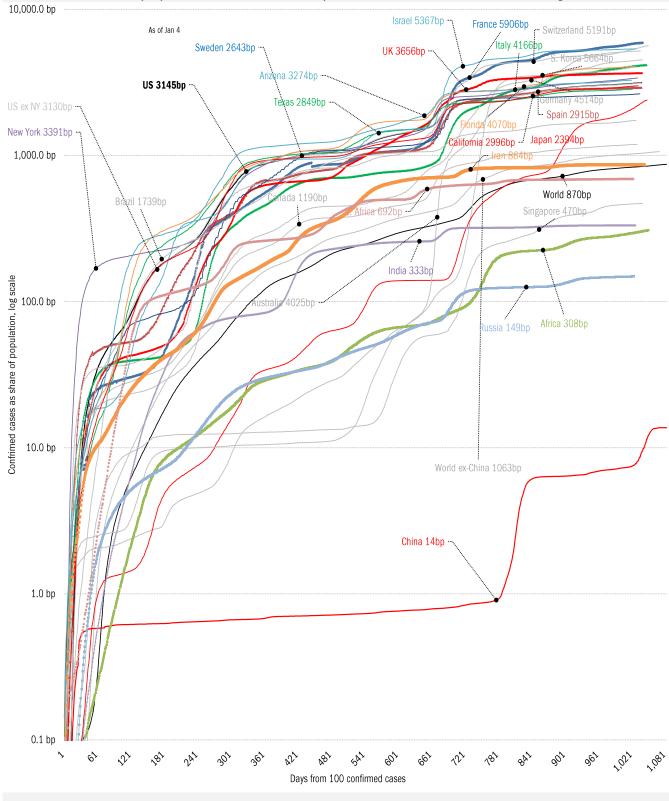
WHO Says China Is Undercounting Covid Deaths, Asks for More Reliable Data

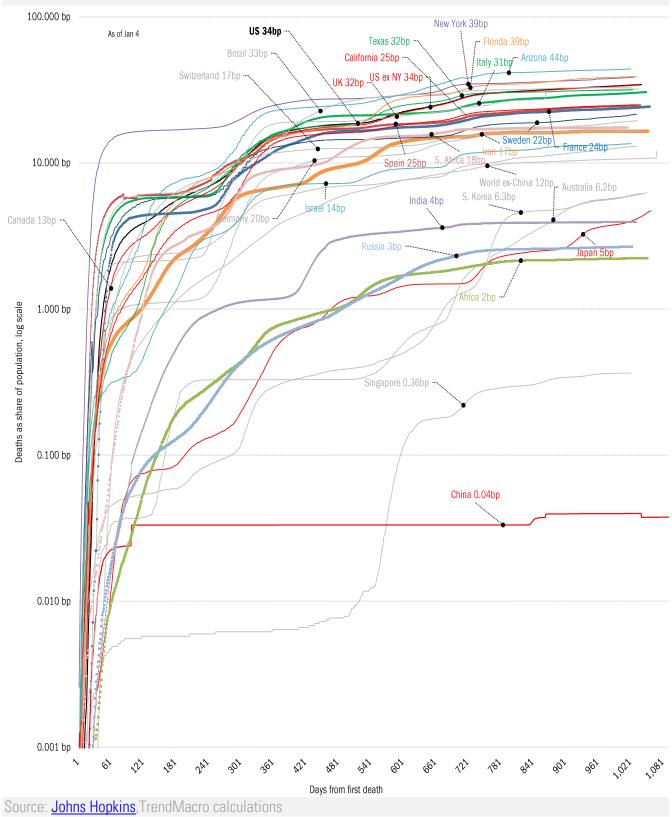
Joyu Wang and Liyan Qi *Wall Street Journal* January 4, 2023



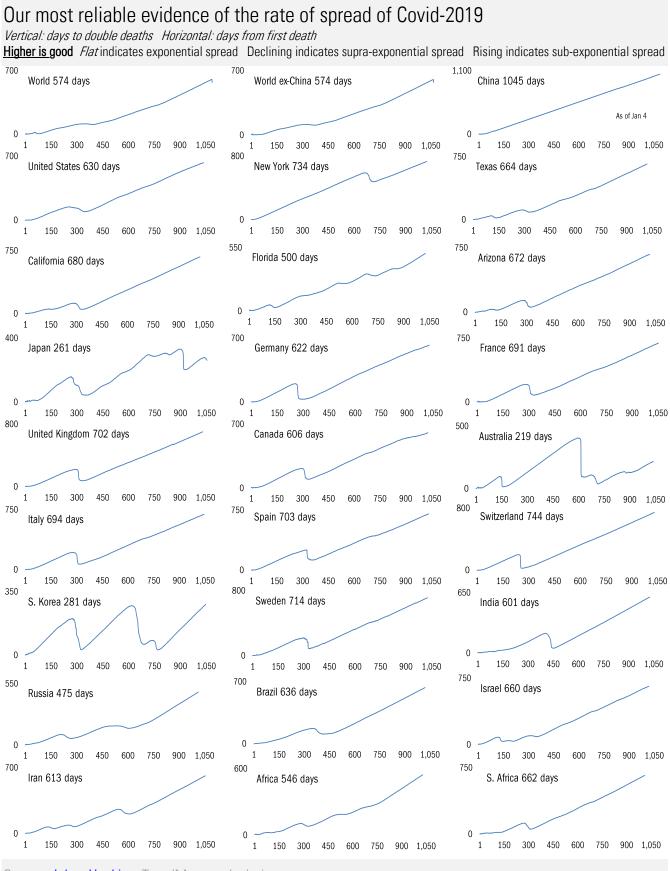
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

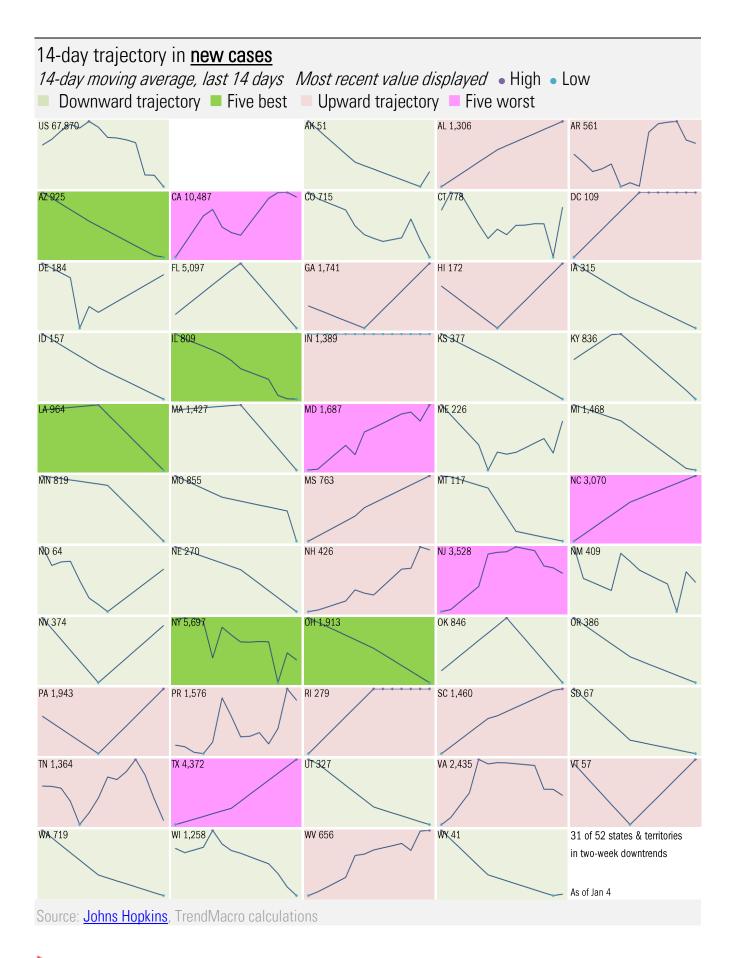


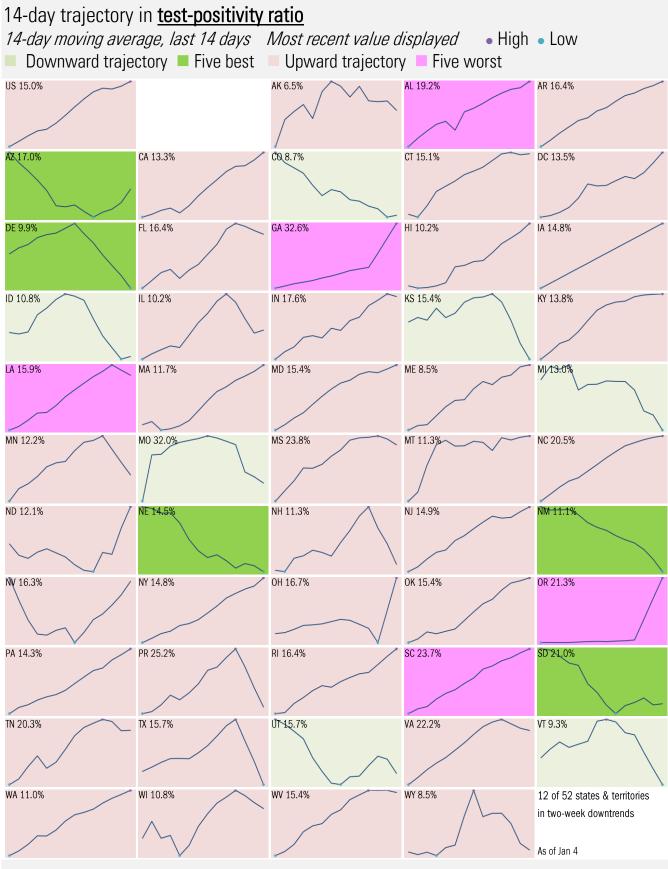




The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of population deceased from day of first fatality, log scale*



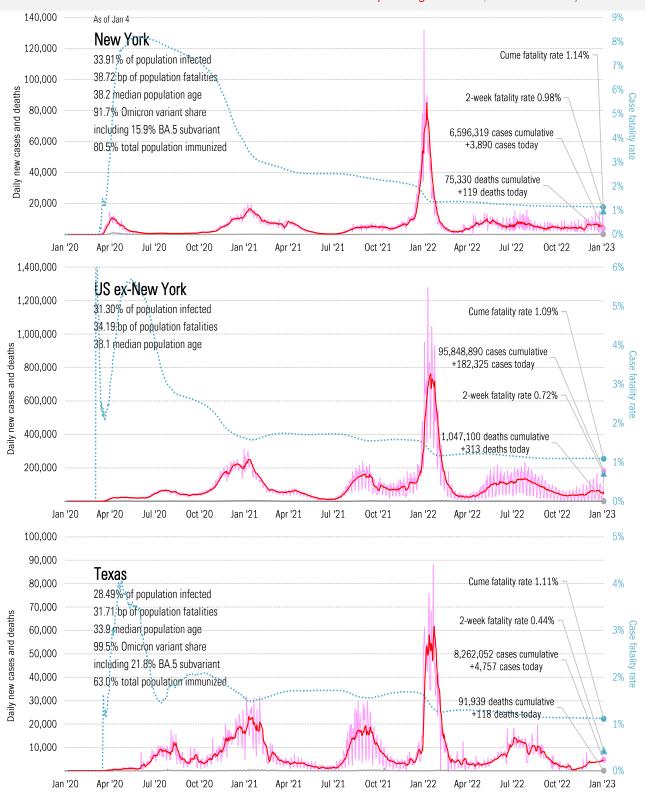




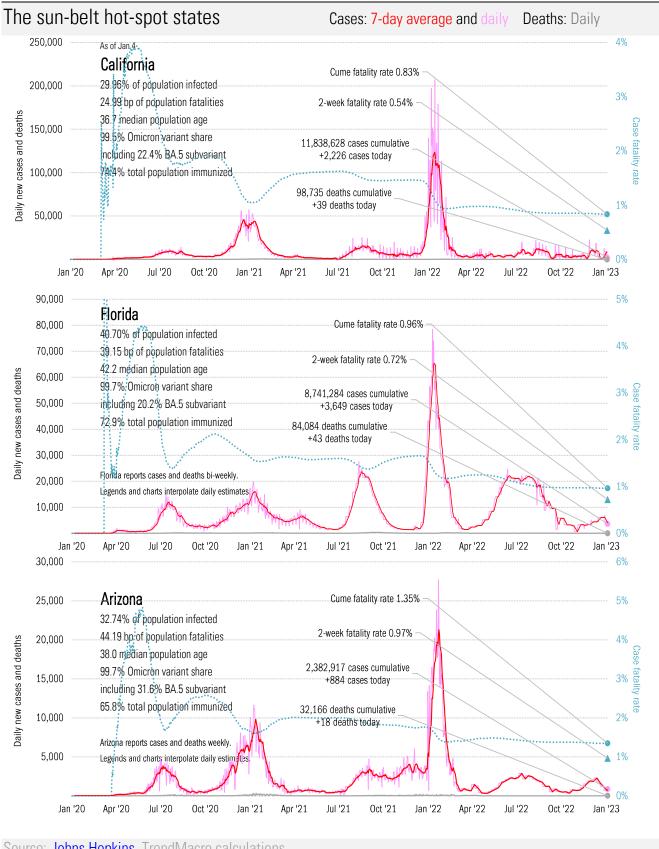
Source: Covid Act Now, TrendMacro calculations

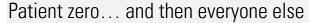
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily

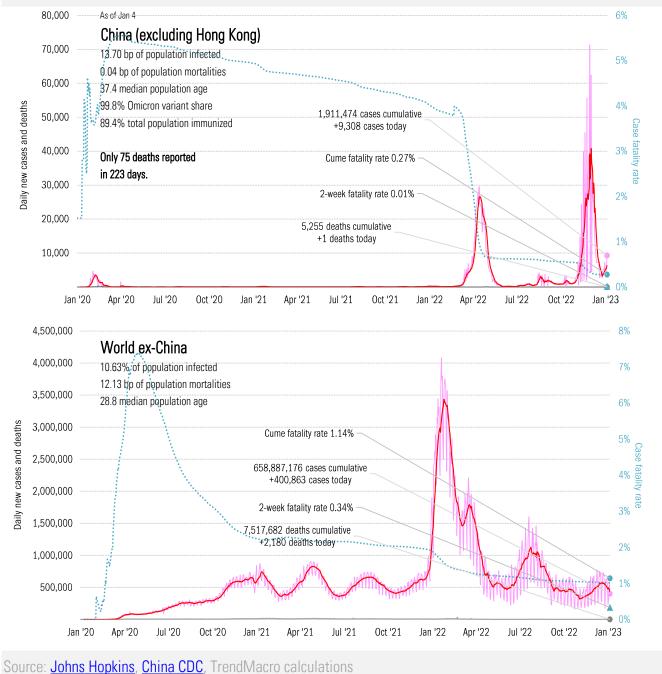


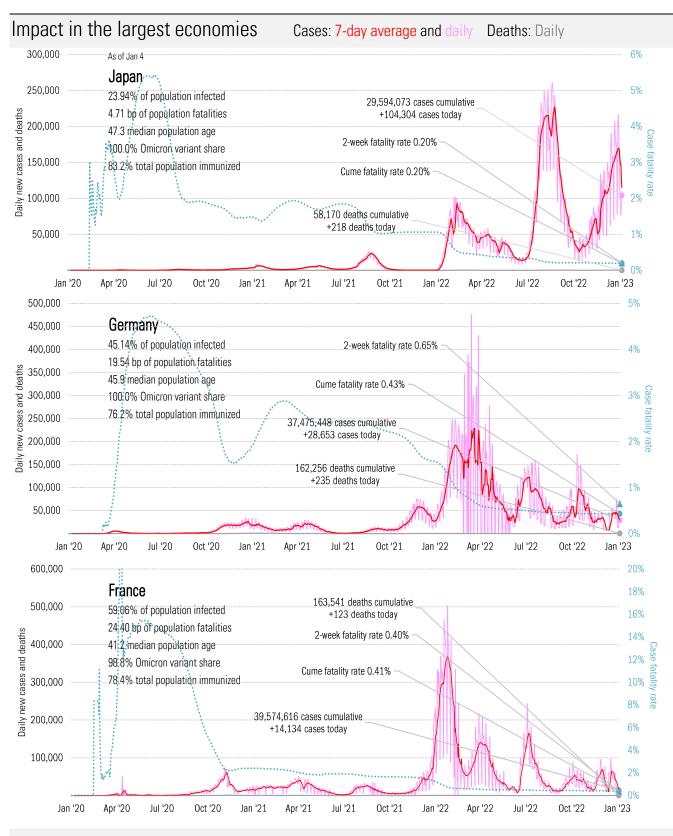




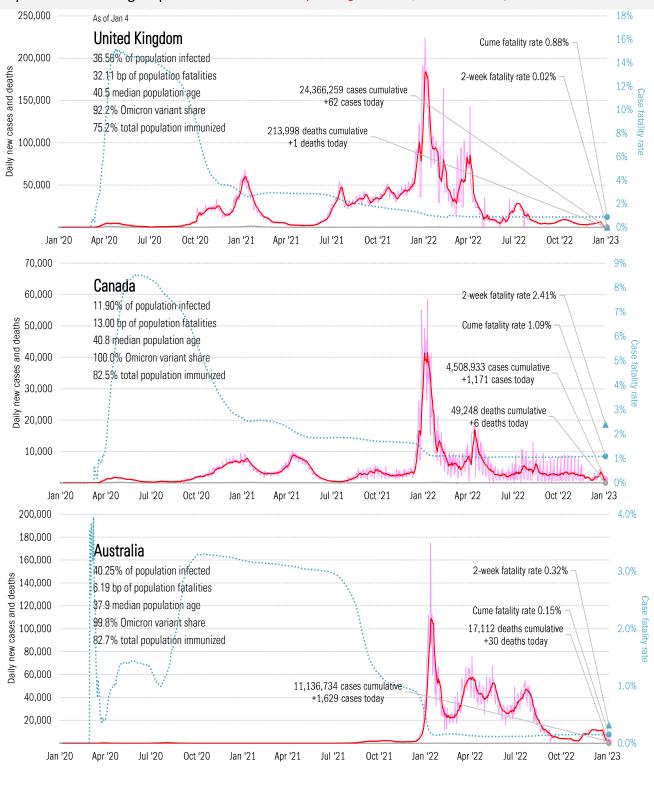


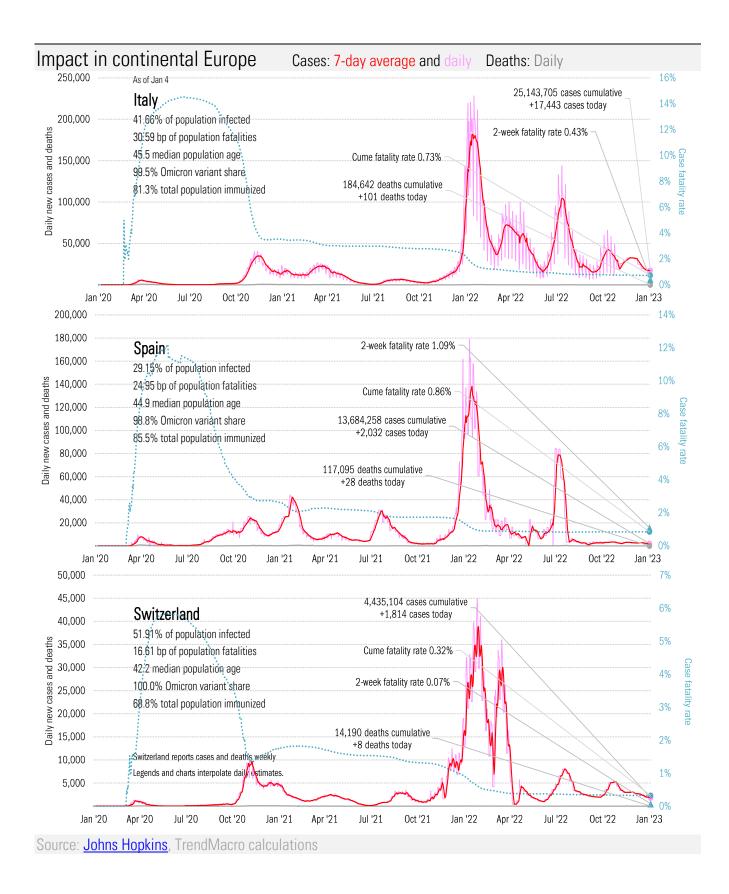
Cases: 7-day average and daily Deaths: Daily

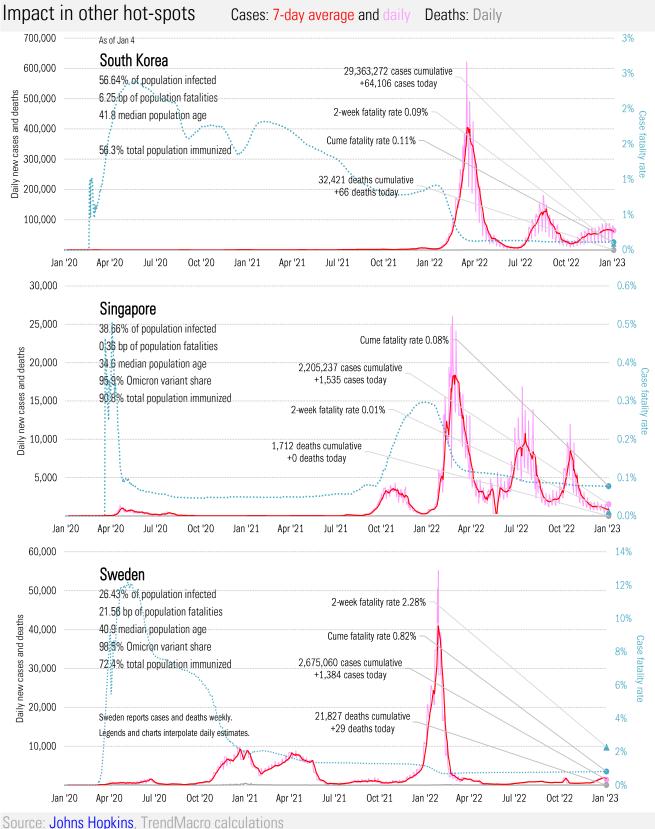




Impact in The Anglosphere Cases: 7-day average and daily Deaths: Daily

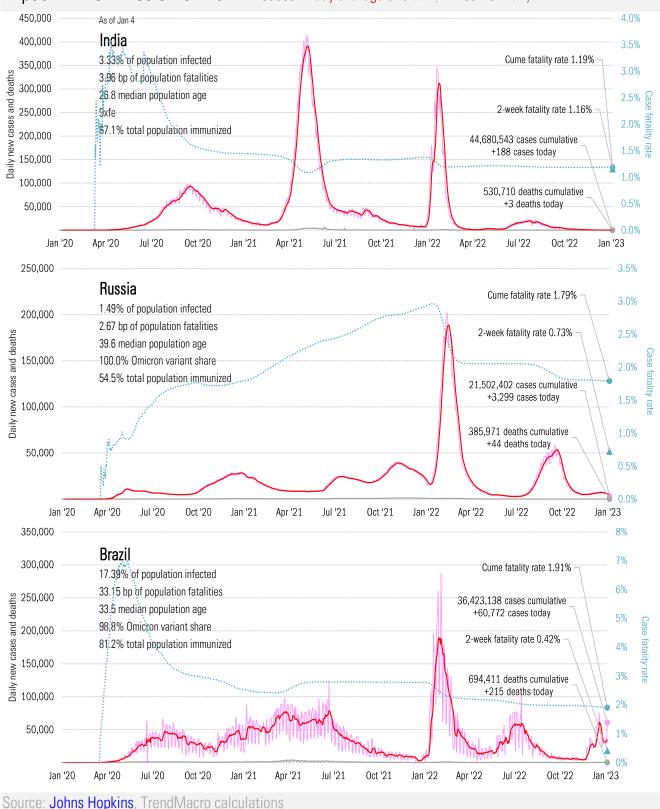


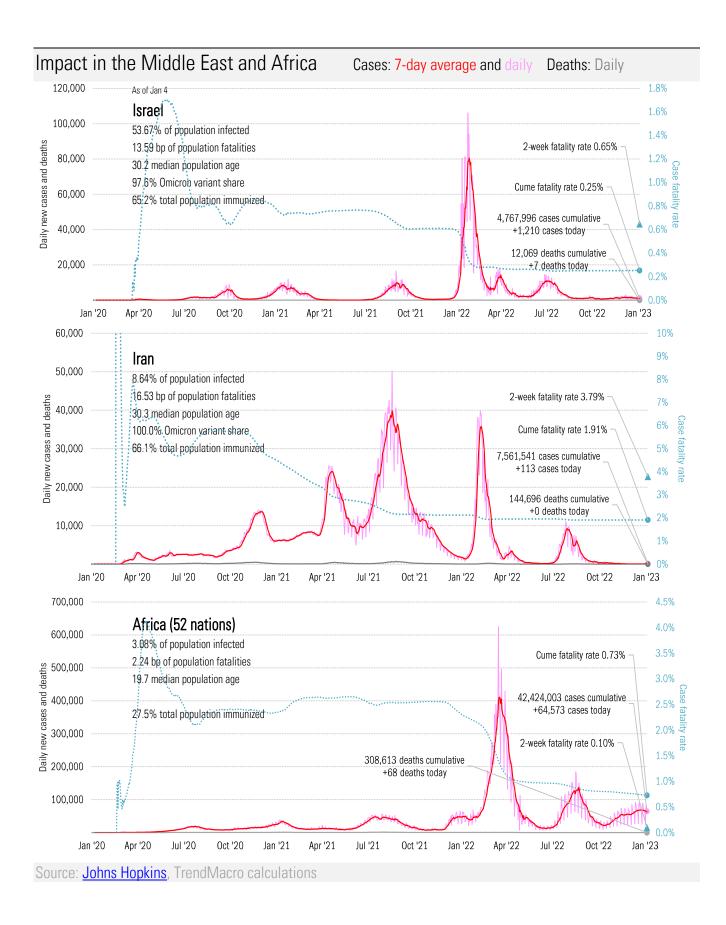




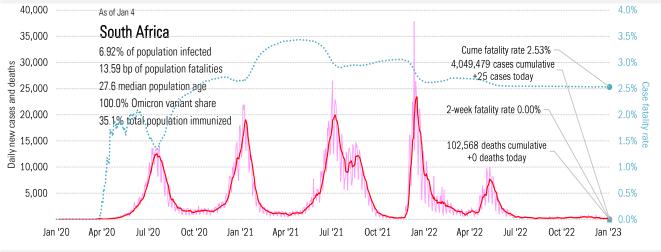
Impact in the BRICs ex-China Cases: 7-da

Cases: 7-day average and daily Deaths: Daily





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



Source: Johns Hopkins, Trend Macro calculations