

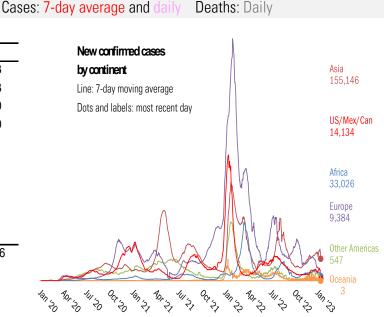
Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

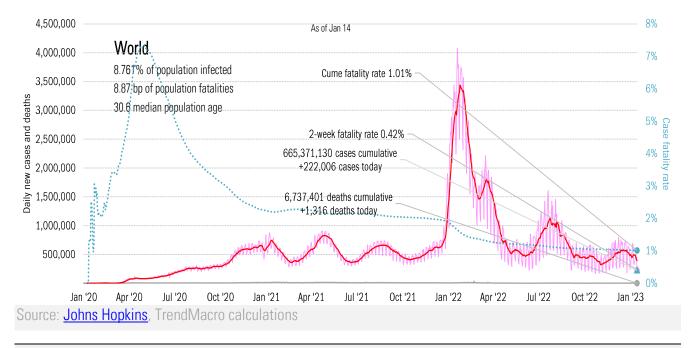
#### Data Insights: Covid-2019 Monitor

Sunday, January 15, 2023

### The global scorecard







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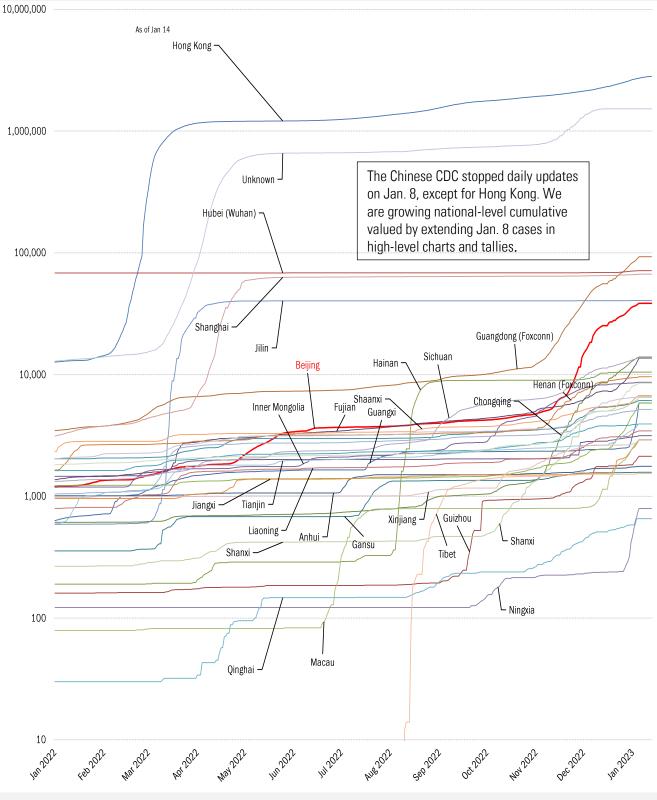
## The US scorecard

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

The ten worst US states																
New cases		New deaths		New in hospital		Qume cases		Quine deaths		Curre in hospital		Hospital use		IC	ICU use	
Æ	7,887	NY	52	VA	204		11,929,677	CA	99,319	TX	575,938		89%		90%	
NC	3,232	IL	45	CA	587		8,302,540	TX	92,097	CA	550,830	MA			87%	
NJ	3,169	PA	33	CT	119		7,393,712	R.	84,176	Æ	520,225	WA			87%	
KY	3,042	NC	30	NJ	268	NY	6,648,422	NY	75,751	NY	342,224		87%		87%	
VA	2,561	AZ	27	AL	92		3,981,275	PA	49,263	Ю	238,807	NH			87%	
PA	1,973	TX	27	NE	27	PA	3,447,091	GA	41,648	GA	237,170	MD			86%	
NY SC	1,910 1,881	MI MA	24 23	MO OK	114 67	CH	3,382,420 3,331,651	CH MI	41,139 41,001	PA IL	223,450 207,274	MO DC			85% 85%	
GA	1,836	R.	23 23	AZ	73	GA	3,011,842	IVII IL	40,747	MI	207,274 177,077	AK			84%	
TX	1,716	SC	23 22	W	82	M	3,008,317	NJ	35,670	NJ	156,642		84%		83%	
	29,207		306	•••	1,633	IVII	54,436,947	110	600,811	INU	3,229,637		07/0	5	0070	
	20,201		000		1,000		04,400,047		000,011		0,220,001					
All states	48,614		543		5,328	All states	103,094,	062	1,127,461		5,858,237	All states	70%		67%	
Topten	60%		56%		31%	Topten	54%		55%		55%	Median			79%	
•						•				me states i	not reporting					
Five most improved US states																
Fewer daily cases Fewer new deaths Fewer new hospitalizations																
NY	-3,307				CA	-167			PA	-60						
AR	-79				CT	-4			NY	-41						
AK	0				ω	-2			FL.	-27						
AL	0				WY	-1			DE	-26						
AZ	0				MT	-1			IA	-25						
1,600,000															12%	
	As of J	Jan 14														
1,400,000																
	Uni	United States Cume fatality rate 1.09%										10%				
1,200,000	31,65% of population infected															
1,200,000	34.61 bp of population fatalities															
sh	38 median population age								2-week fatality r				rate 0.78% - 8%			
death death	99.8%	% Omicron v	micron variant share													
	69,1%	% total popu	ulation im	nunized						NI -					Case	
g 800,000		particular second	N.							1 10	0.004.000				6%	
S D D		4	$\mathcal{N}$							10.	3,094,062 ca +48,614 ca	ses cumulative _ ses today	$\langle \rangle$		6% Ideality Idea	
800,000 Mail 600,000												,			16	
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400,000				and the second second					- 1	1	127,461 dea; +543 dea	ths cumulative _		$\langle    $		
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200,000		•			MAX.				·····	· ' <u>\</u>		La La Maldella				
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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

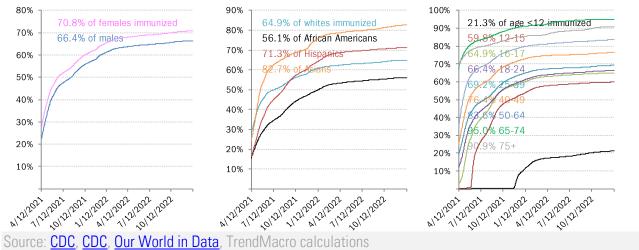
**China provincial** coronavirus <u>case</u> accelerometer... tracking the "zero Covid" curves *Cumulative reported cases this year, log scale: flat line indicates "zero Covid"* 

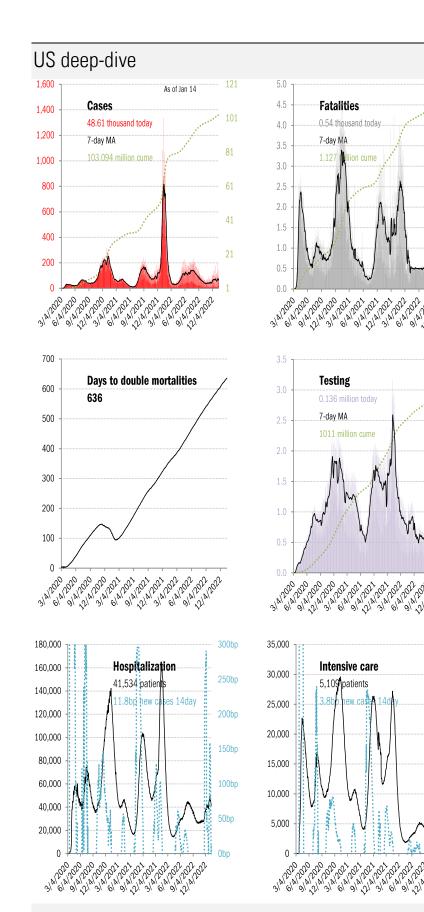


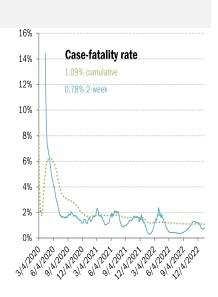
Source: Johns Hopkins, TrendMacro calculations

Rolling out the vaccines in the US and the world <u>Updates weekly on Friday</u>												
Administered Cumulative							day	Immunity	Full	Partial		
Doses		683,142,150				+0.210 millior		million	US	69.1%	80.9%	
							h boosters: +0.197 million			UK	75.2%	79.7%
		One dose				nune		New imm		<u> </u>	78.4%	80.6%
Total population		276,962,615		83% 73%		236,176,717		71% +0.016		Spain	85.5%	86.9%
-	Age 12 to 17		18,423,808			15,775,755		62% +0.001		Germany	76.2%	77.8%
Age 18 to 64		184,183,382		91% 100%		156,609,051		77% +0.009 m 97% +0.001 m		ltaly	81.3%	86.2%
•	Age 65 and over		60,964,171		5	53,416,192		+0.001 million		Australia	82.7%	84.9%
Other										Israel Canada	65.2%	71.1%
3%					_						82.6%	90.2%
Modema 38% Pfizer 59%		Sta	ate	Best						Japan	83.2%	84.4%
				5030						Africa	27.6%	33.6%
			tial immunity	Midd	le					India	67.1%	72.5%
		as % po		Wildle						Brazil	81.4%	87.7%
		Full im	'	Wors							89.4%	91.7%
AK		as % po		VV013	51	<u> </u>					ers due to sou	rces, timing
72.8% 65.0%		"Immunity" = tv	vo doses			WI		As of Jan 13			ME	
					75.0%						95.0%	
					-	68.0%		-			83.1%	
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	85.0%	63.8%	68.1%	69.2%	78.6%	79.0%	69.3%		94.2%	95.0%	87.5%	
	75.8%	56.3%	59.0%	58.5%	72.0%	71.1%	62.2%		80.6%	85.4%	71.5%	
	OR	NV	WY	SD	IA	IN	ОН	PA	NJ	MA		
	81.4%	77.4%	60.8%	83.5%	70.5%	64.2%	65.6%	90.3%	94.4%	95.0%		
	72.2%	63.6%	53.0%	66.0%	64.2%	57.6%	60.3%	73.1%	78.9%	84.0%		-
	CA	UT	CO	NE	MO	KY	WV	VA	MD	СТ	RI	
	84.4%	75.0%	83.4%	73.2%	69.2%	68.7%	67.4%	90.7%	91.5%	95.0%	95.0%	
ļ	74.5%	66.5%	73.3%	66.1%	58.9%	59.5%	59.6%	76.4%	79.5%	82.9%	87.5%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		
		77.2%	94.1%	76.0%	69.7%	64.3%	91.8%	70.8%	95.0%	88.0%		
		65.9%	75.0%	65.1%	56.8%	56.2%	66.9%	59.8%	89.9%	73.1%		
				OK	LA	MS	AL	GA				
<u> </u>	l			74.4%	62.7%	61.5%	64.9%	68.2%				
HI				60.3%	54.9%	53.6%	53.1%	57.1%		, ,		-
91.2%				TX					FL		PR	
81.4%				76.2%					82.3%		90.8%	
				63.1%					69.3%	J	83.9%	

#### The demographics of US vaccination







0.4

800

600

400

100bp

90bp

80bp

70bp

60bp

50bp

40bp

30bp

20bp

0hp

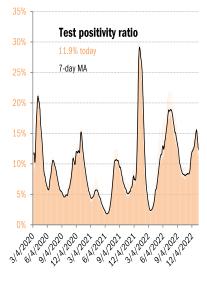
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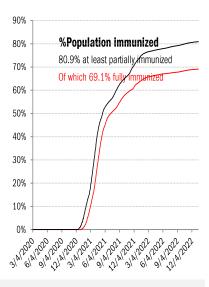
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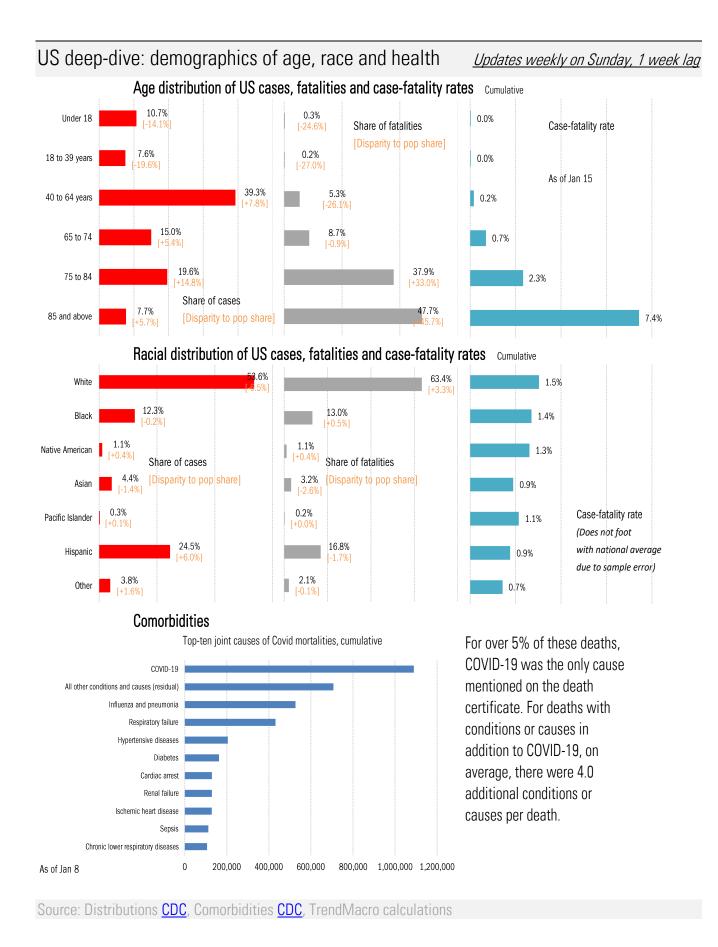
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Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



## Recommended reading

#### <u>Children's Health Defense et al. versus Washington</u> <u>Post et al.</u>

Ryan P. Brown and John W. Howard United States District Court, Northern District of Texas, Amarillo Division January 10, 2023

#### Breaking: Landmark Lawsuit Slaps Legacy Media With Antitrust, First Amendment Claims for Censoring COVID-Related Content

Michael Nevradakis, Ph.D. *The Defender* January 10, 2023

#### The Lancet has become a laughing stock Norman Fenton and Martin Neil *Where Are the Numbers?* January 14, 2023

## XBB.1.5 shows we're thinking about covid variants

<u>all wrong. Here's a better way.</u> Jonathan Lambert *Grid* January 11, 2023

<u>A post-pandemic drop in kindergarten vaccinations is</u> <u>making public health officials very nervous</u> Dan Vergano *Grid* January 12, 2023

## Meme of the Day

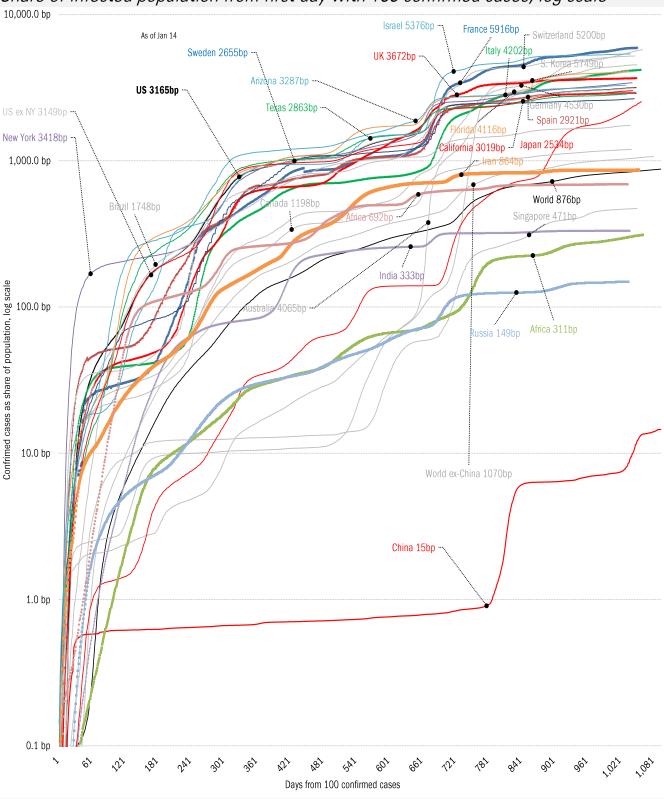
## German Gov't Claims Investigating Covid Vaccines Would Be 'Dangerous For Democracy'



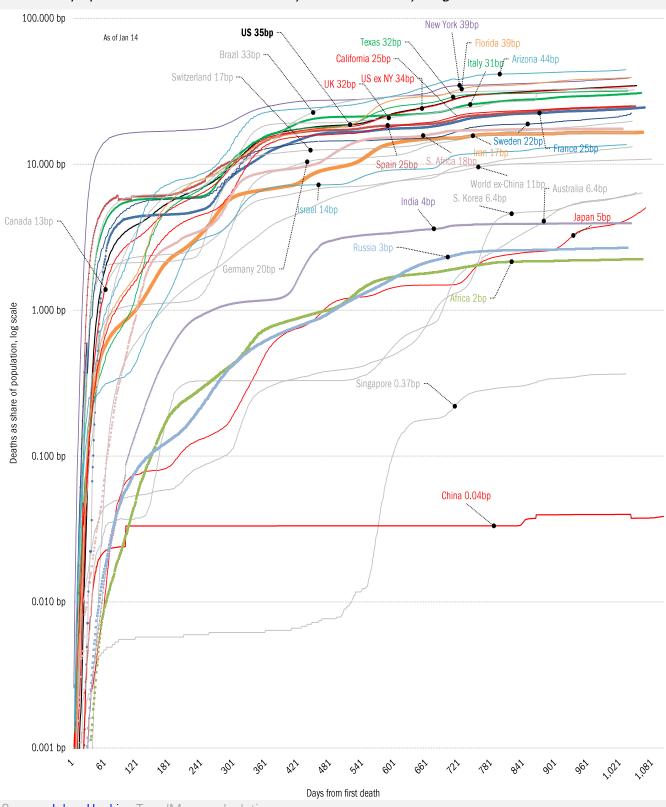




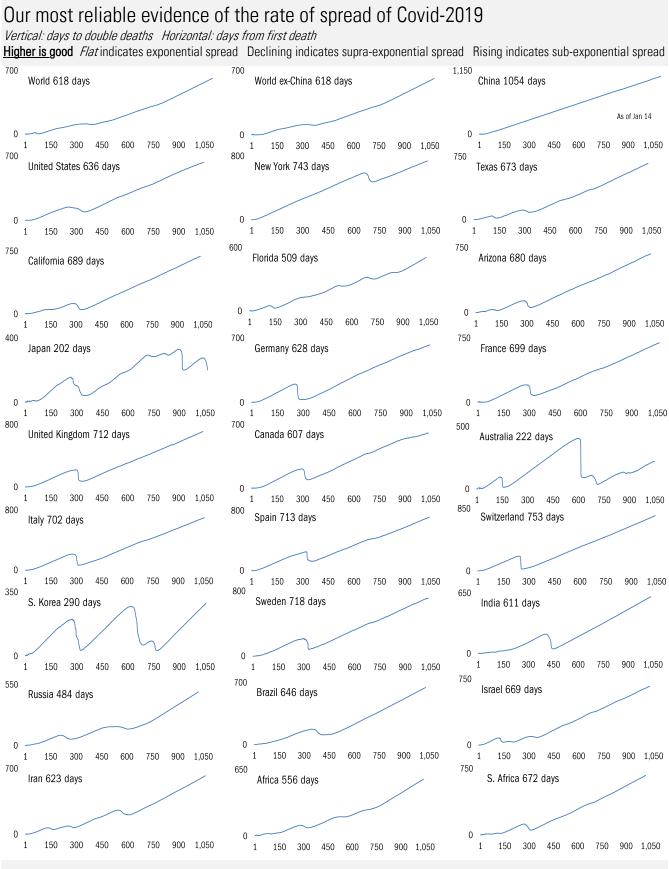
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

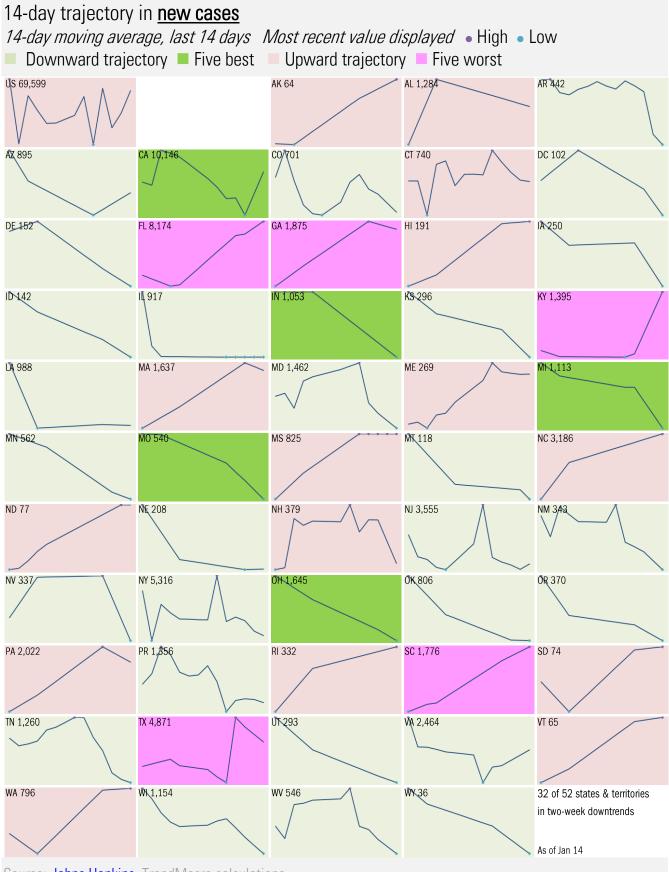


The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves Share of infected population from first day with 100 confirmed cases, log scale

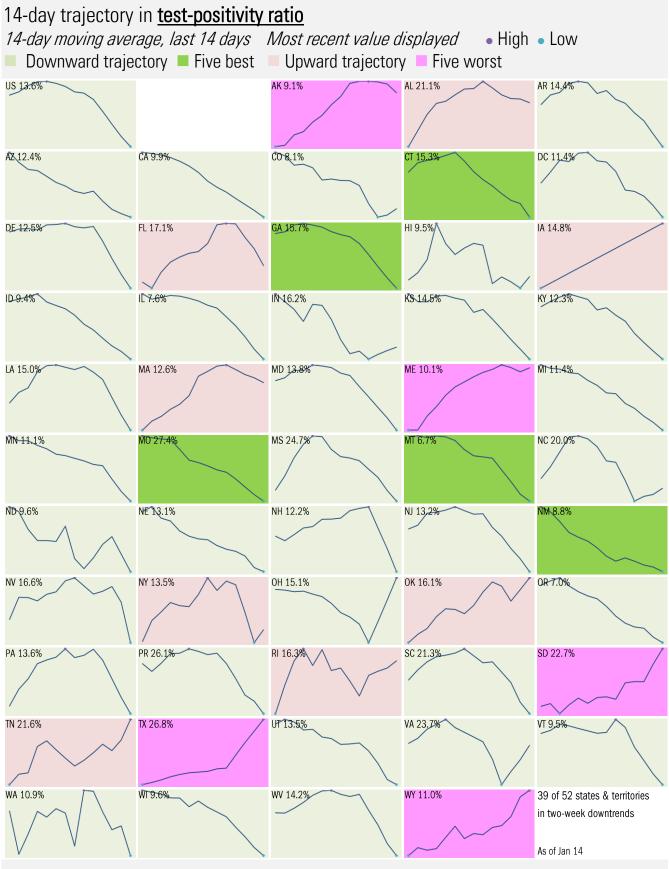


# The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of population deceased from day of first fatality, log scale*





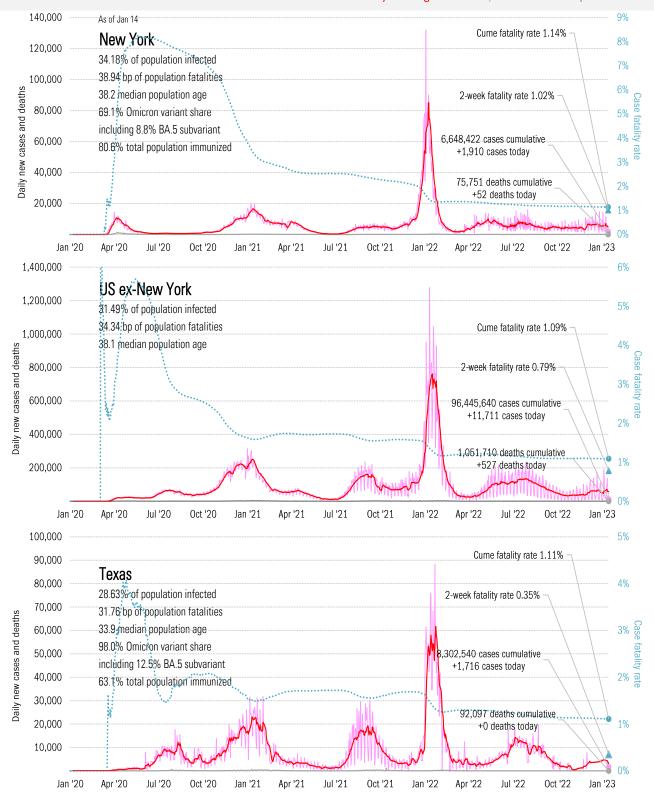
Source: Johns Hopkins, TrendMacro calculations



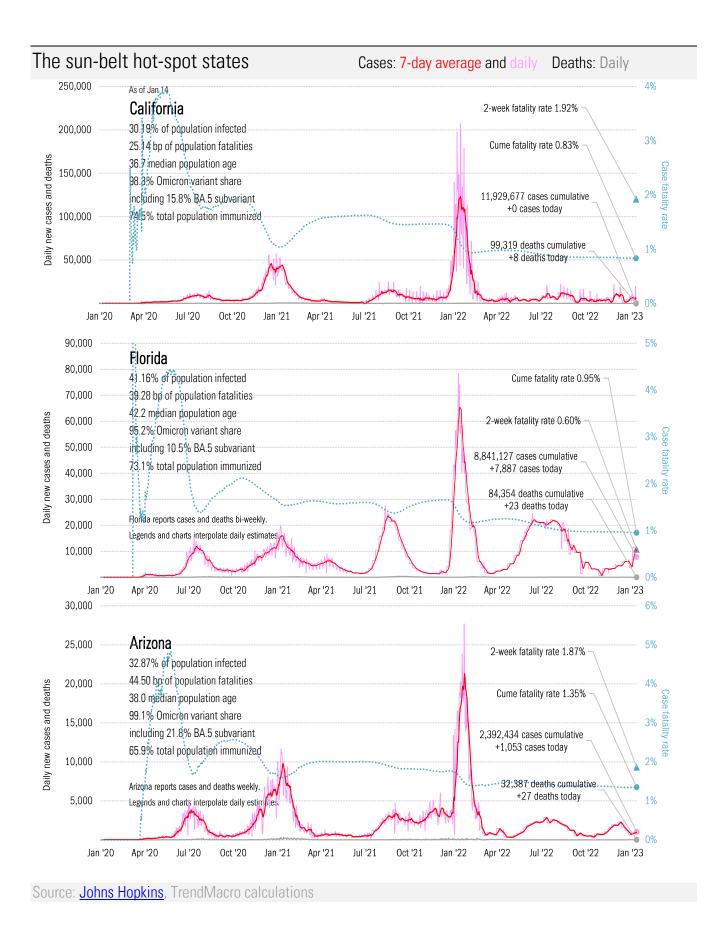
Source: Covid Act Now, TrendMacro calculations

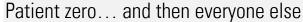
From Ground Zero to the Rio Grande

Cases: 7-day average and daily Deaths: Daily



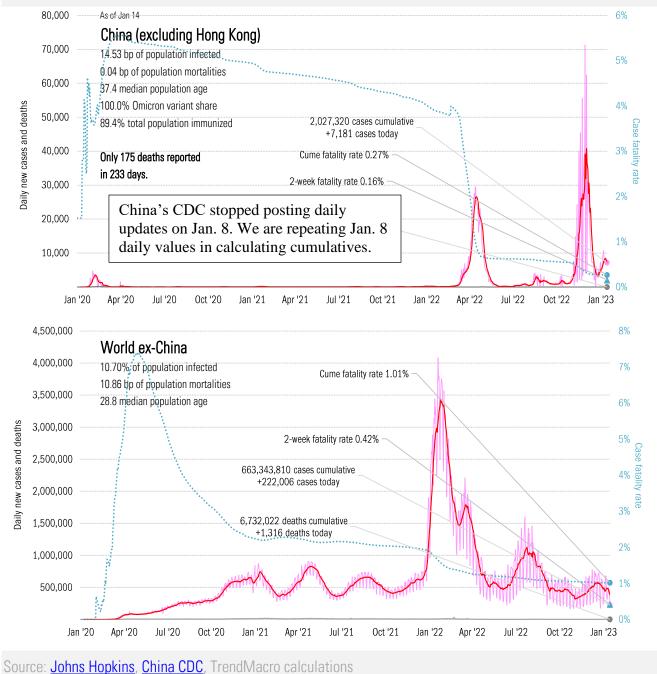
Source: Johns Hopkins, TrendMacro calculations



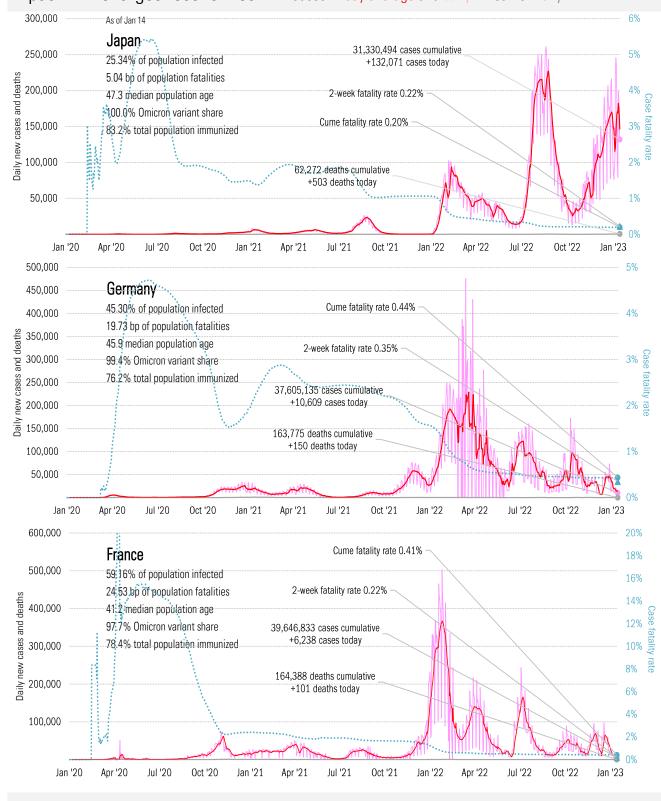


Cases: 7-day average and daily

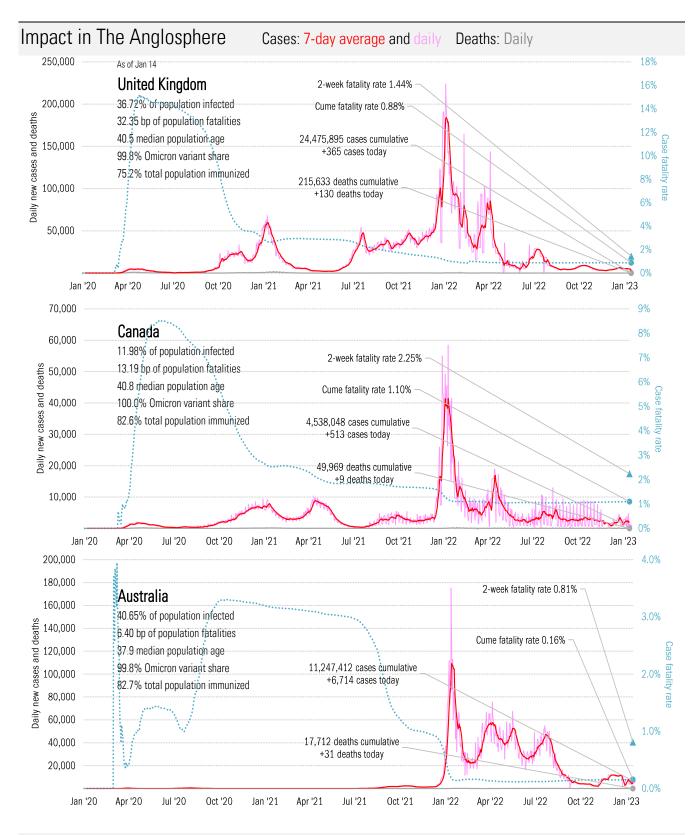


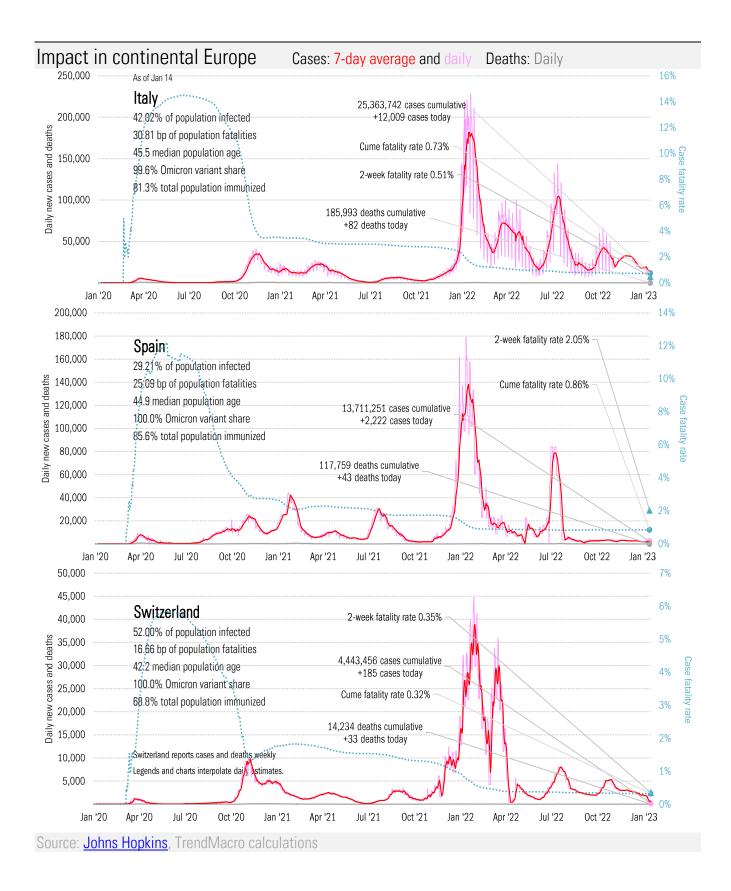


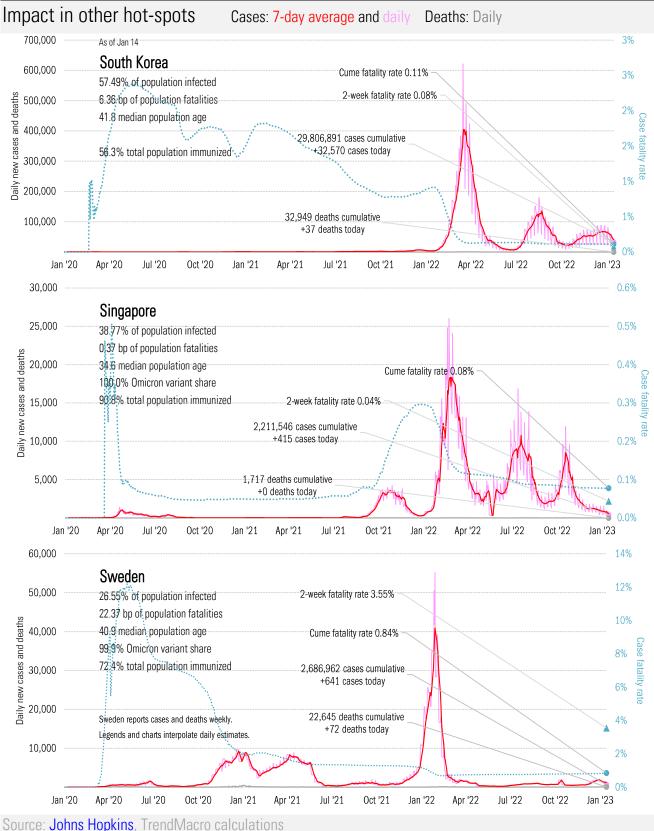
Impact in the largest economies Cases: 7-day average and daily Deaths: Daily



Source: Johns Hopkins, TrendMacro calculations

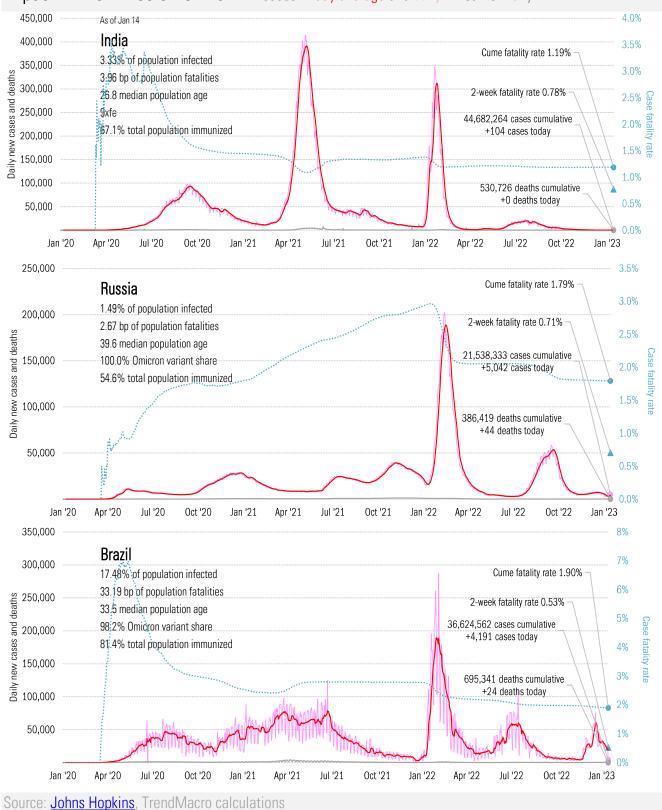


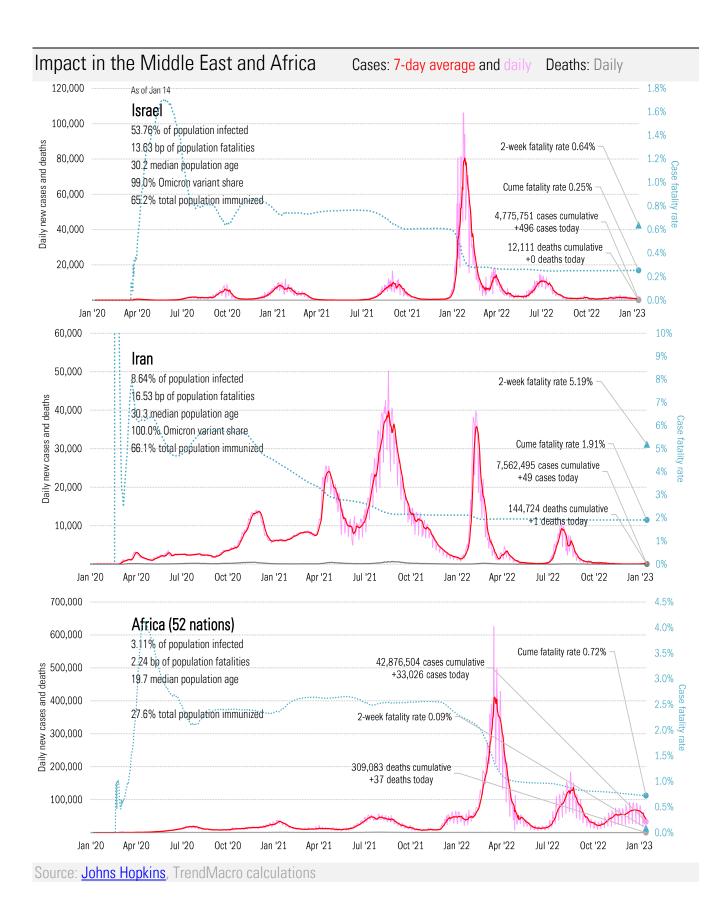




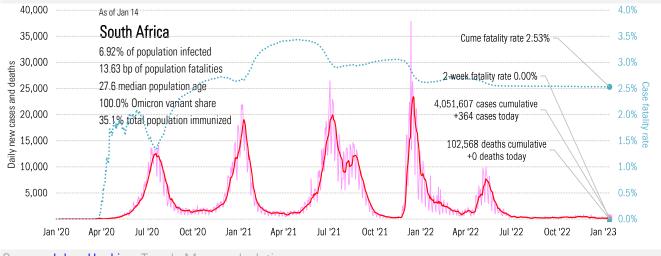
Impact in the BRICs ex-China Cases

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