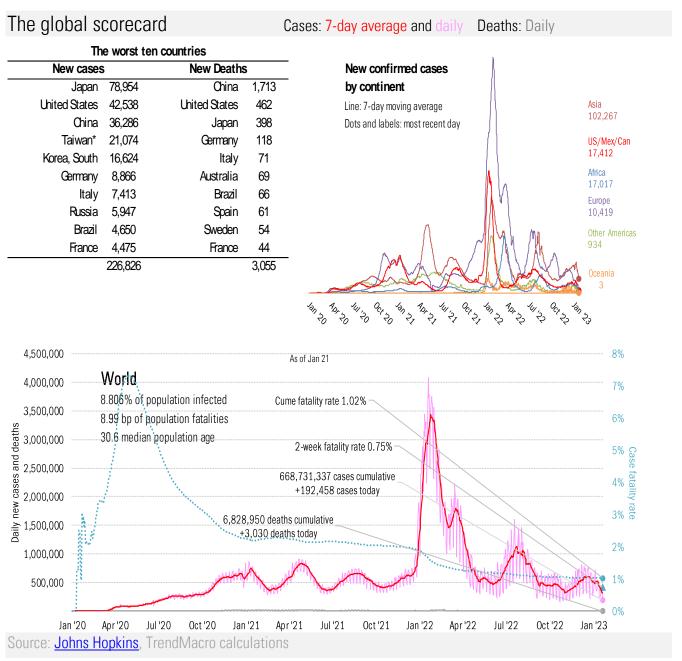


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

## Data Insights: Covid-2019 Monitor

Sunday, January 22, 2023



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# The US scorecard

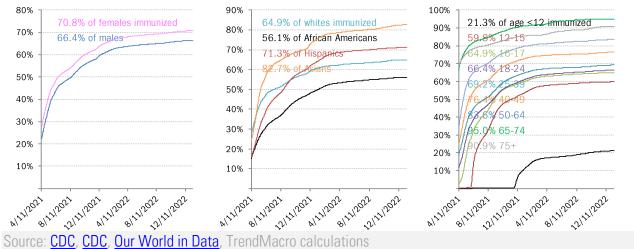
## Cases: 7-day average and daily Deaths: Daily

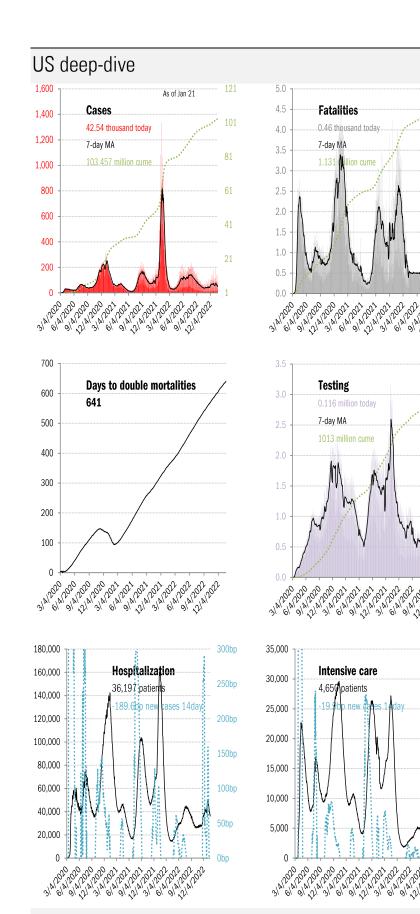
						The te	n worst US	states								
New cases		New deaths		New in hospital		Qume cases		Quime deaths		Oume in hospital		Hospital use		IC	ICU use	
R.	7,177	ω	51	OK	78		11,957,408	CA	99,685	TX	578,560		91%		90%	
CA	4,725	TΝ	33	IN m	93		8,329,536	TX	92,367	CA	553,926	DE			89%	
NJ	2,614	MI	26 21	00	57 29		7,443,954	FL NV	84,927 75.045	FL.	522,955 244,994	MA			86% 96%	
NC TX	2,249 1,947	NY MA	21 21	IA NJ	38 218	NY IL		NY PA	75,945 49,397	NY	344,884 239,816	MC MN		R	86% 86%	
NY	1,947 1,781	VA	20	RL	400	n∟ PA	4,000,044 3,458,136	GA	49,397 41,772	CH GA	239,010	MD			85%	
VA	1,508	IL	20 19	PA	195		3,398,161	сл СН	41,249	PA	200,072	DC			84%	
PA	1,470	PA	19	Н	25	CH	3,339,612	M	41,185	L	208,469	NH			84%	
MI	1,376	AZ	18	MD	103	GA	3,020,166	IL	40,980	MI	177,710	NC		GA		
MA	1,200	TX	18	KY	56	MI	3,017,948	NJ	35,725	NJ	158,018	SC	83%	MA	83%	
	26,047		247		1,263		54,647,771		603,232		3,247,053					
AU	10 500		(00			<b>A</b> 11 <i>i i</i>	100 157				= 000 040	AU	700 (		<b>0</b> 70 (	
All states	42,538		462		4,501	All states	103,457,5	248	1,130,513		5,889,016	All states			67%	
Topten	61%		54%		28%	Topten	54%		55%	ma etatae i	55%	Median	18%		77%	
Some states not reporting																
Fewer daily cases         Fewer new deaths         Fewer new hospitalizations																
NY	-296				MD	-9			-	-94						
AR	-203				NH	-3			CA	-89						
ME	-30				СТ	-2			MA	-37						
AK	0				MO	-2			CT	-32						
AL	0				TX	-2			R	-21						
1,600,000															12%	
	As of J	an 21														
1,400,000																
												10%				
1,200,000	31,76% of population infected Cume fatality rate 1.09%															
	34/1 bp of population fatalities										· · · · · · · · · · · · · · · · · · ·					
aths 1,000,000		nedian pop	-												8%	
and deaths 1,000,000		6 Omicron v									2-week fatali	ty rate 0.73% –				ĉ
	69.1%	6 total popu	niariou imi	nunizea											0.00	Case fa
Daily new cases 000,000 600,000		10	N.							/k	400 457 04	<b>.</b>	. \		6%	fatality rate
New												8 cases cumulat 8 cases today	ive			/ rate
.ie 600,000											,	- ····,				
			$\sim \lambda_{\rm c}$								1,130,513	B deaths cumulat	ive		4%	
400,000			1						ľ			deaths today		$\mathbb{N}$		
				1999. 1997.	S. h					1					000	
200,000					mA			n			ab	. alla			2%	
_00,000					MIN	<b>\</b>	1	The.		·					è	
			$\sim$	Margare and Margare		water and		MIII	HANN!	'IN+			AAAAAAA	h	<b>0</b> 00	
Jan '	'20 Ar	or '20	Jul '20	Oct '20	Jan '21	Apr '21	Jul '21	Oct '2	1 Jan '2	22 A	pr '22 J	ul '22 Oct	'22	Jan '2	• 0% 3	
	· ·r															

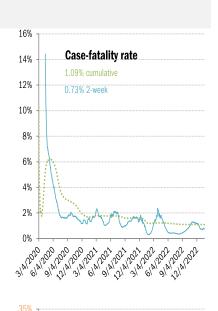
Source: Johns Hopkins, Dept. of Health and Human Services, CDC, TrendMacro calculations

Rolling out the vaccines in the US and the world <u>Updates weekly on Friday</u>												
Administered Cumulative							Today		Immunity	Full	Partial	
Doses		68	684,488,377				+0.192 million		million	US	69.1%	80.9%
							h boosters: +0.157 r			UK	75.2%	79.7%
		One	dose			nune		New imm	une toda <sup>,</sup>	y France	78.4%	80.6%
	Total population		277,177,672		23	6,331,846	71%			Spain	85.6%	86.9%
-	Age 12 to 17		18,436,781			15,783,816		62% +0.001 milli		Germany	76.2%	77.8%
Age 18 to 64		18	4,313,168	91%	15	156,693,936		<ul> <li>+0.012 million</li> <li>+0.004 million</li> </ul>		ltaly	81.3%	86.2%
Age 65 and over		60,998,716		100%	5	53,444,575		+0.004 million		Australia	82.7%	84.9%
Other										Israel	65.2%	71.1%
3%						_				Canada	82.6%	90.3%
Moderna 38%		Ste	ate	Best							83.3%	84.4%
		510	ale	Dest						Africa	28.0%	33.9%
30%	Pfizer	At least partial immunity		Midd						India	67.1%	72.5%
59%		as % po	pulation	IVIIUU	е						81.4%	87.8%
	0010	Full im	munity	10/						China	89.5%	91.9%
AK		as % po	pulation	Wors	ST					Global data diff	ers due to sou	rces, timing
72.9%		"Immunity" = two doses				WI		As of Jan 20			ME	
65.0%						75.0%					95.0%	
						68.1%					83.2%	
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	85.1%	63.8%	68.2%	69.2%	78.6%	79.0%	69.3%		94.3%	95.0%	88.0%	
	75.9%	56.4%	59.1%	58.5%	72.0%	71.1%	62.2%		80.6%	85.5%	71.8%	
	OR	NV	WY	SD	IA	IN	OH	PA	NJ	MA		_
	81.4%	77.5%	60.8%	83.6%	70.5%	64.3%	65.6%	90.4%	94.5%	95.0%		
	72.2%	63.6%	53.0%	66.1%	64.3%	57.7%	60.4%	73.2%	79.0%	84.1%		_
	CA	UT	CO	NE	M0	KY	WV	VA	MD	CT	RI	
	84.6%	75.1%	83.5%	73.3%	69.2%	68.7%	67.4%	90.8%	91.5%	95.0%	95.0%	
	74.5%	66.6%	73.3%	66.1%	58.9%	59.5%	59.6%	76.5%	79.6%	82.9%	87.5%	
-		AZ	NM	KS	AR	TN	NC	SC	DC	DE		-
		77.3%	94.2%	76.0%	69.8%	64.3%	91.9%	70.9%	95.0%	88.0%		
		65.9%	75.0%	65.2%	56.8%	56.2%	67.0%	59.8%	90.1%	73.2%		
				OK	LA	MS	AL	GA				
				74.5%	62.7%	61.5%	64.9%	68.3%				
HI				60.4%	55.0%	53.6%	53.1%	57.2%				
91.3%				ТΧ					FL	] [	PR	1
81.4%				76.2%					82.3%		90.8%	
				63.1%					69.3%		83.9%	
												-

#### The demographics of US vaccination







0.6

121412022

800

600

400

90bp

80bp

70bp

60bp

50bp

40bp

30bp

20bp

10bp

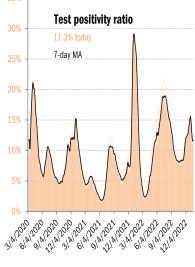
0bp

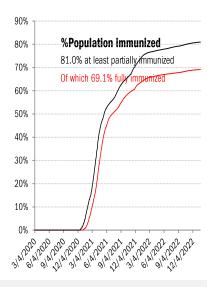
191A12022

1214/2022

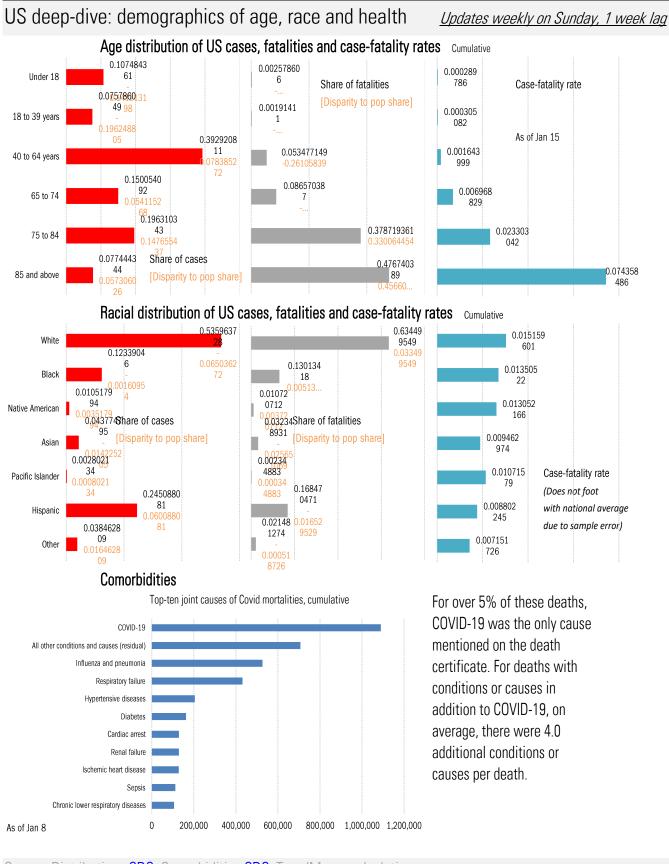
121412022

\*161412022 \*191A1202





Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



## Recommended reading

How These Dog Walkers Make Over \$100,000 a Year

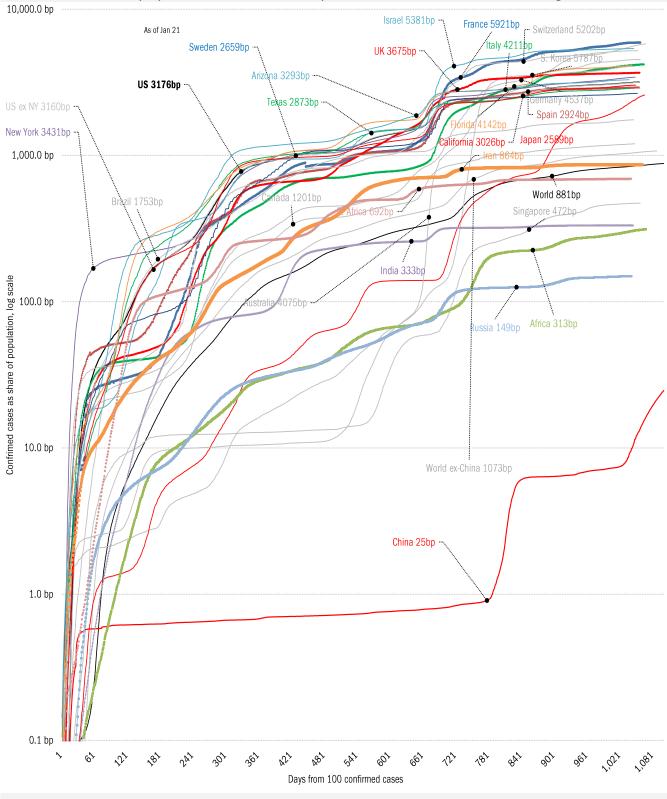
Alyson Krueger *New York Times* January 22, 2023

# Meme of the Day

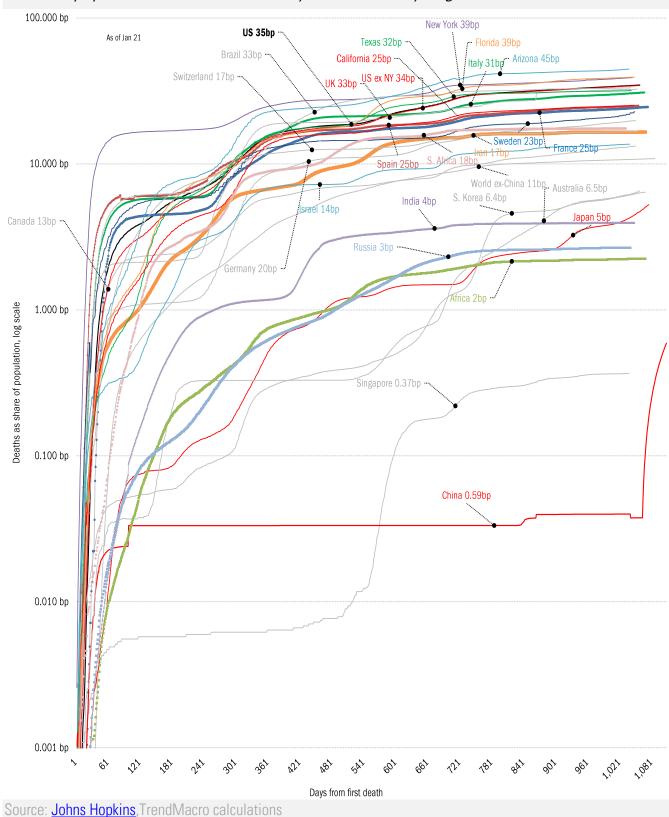


Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

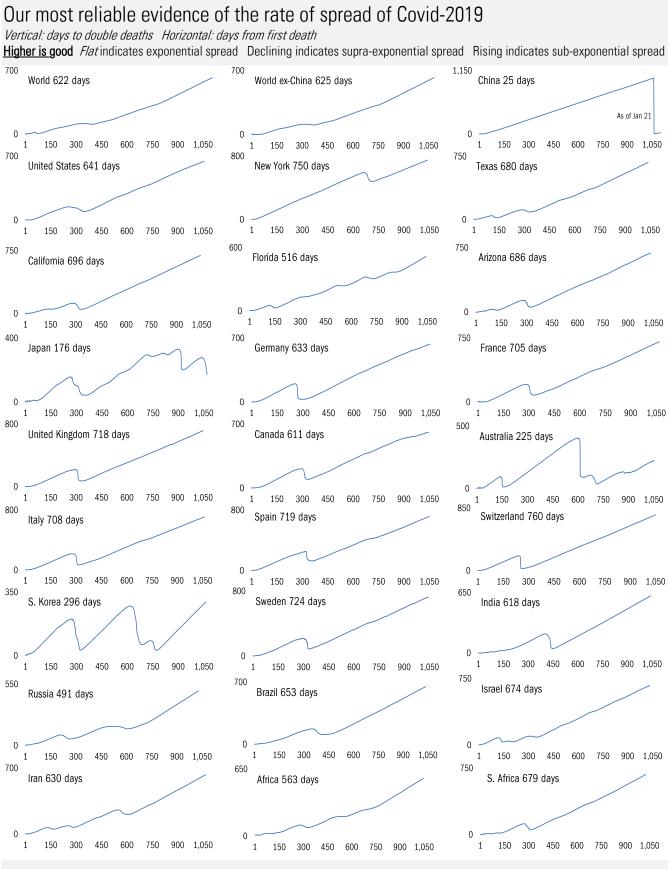
# The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves Share of infected population from first day with 100 confirmed cases, log scale



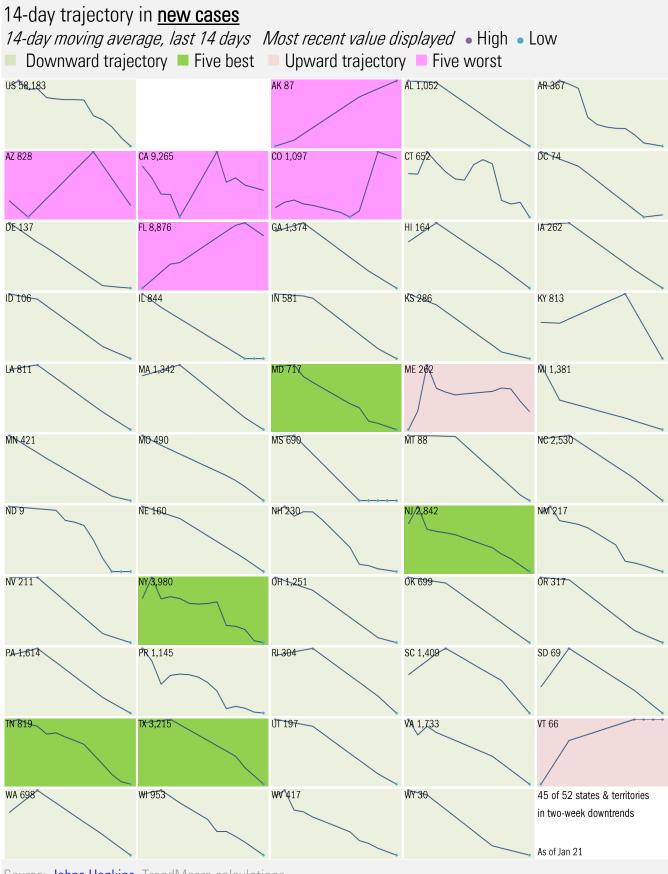
Source: Johns Hopkins, TrendMacro calculations



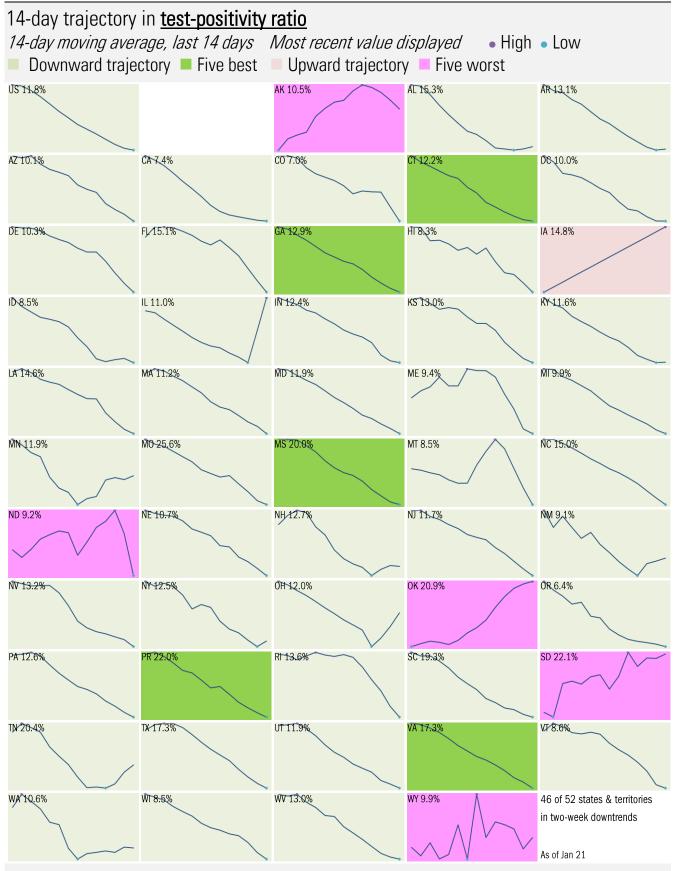
# The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of population deceased from day of first fatality, log scale*



Source: Johns Hopkins, TrendMacro calculations



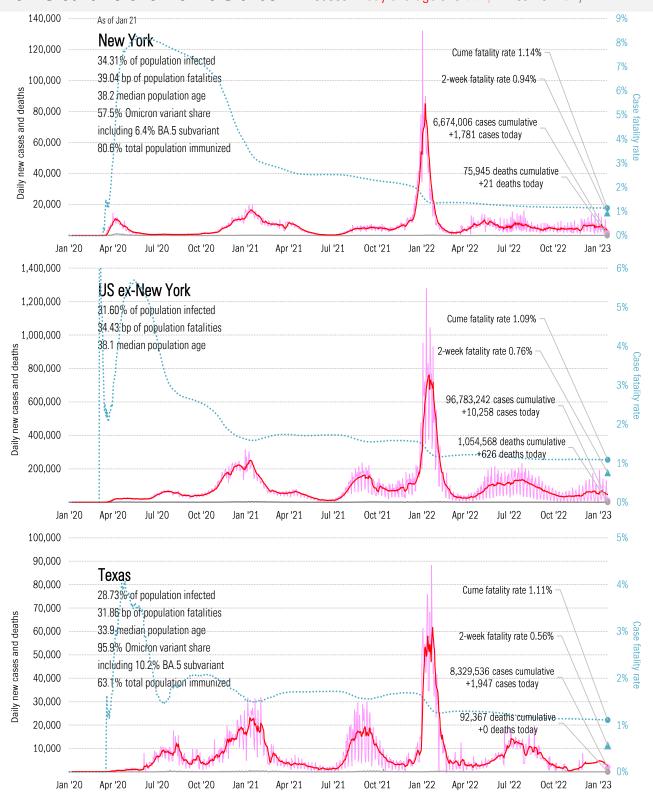
Source: <u>Johns Hopkins</u>, TrendMacro calculations



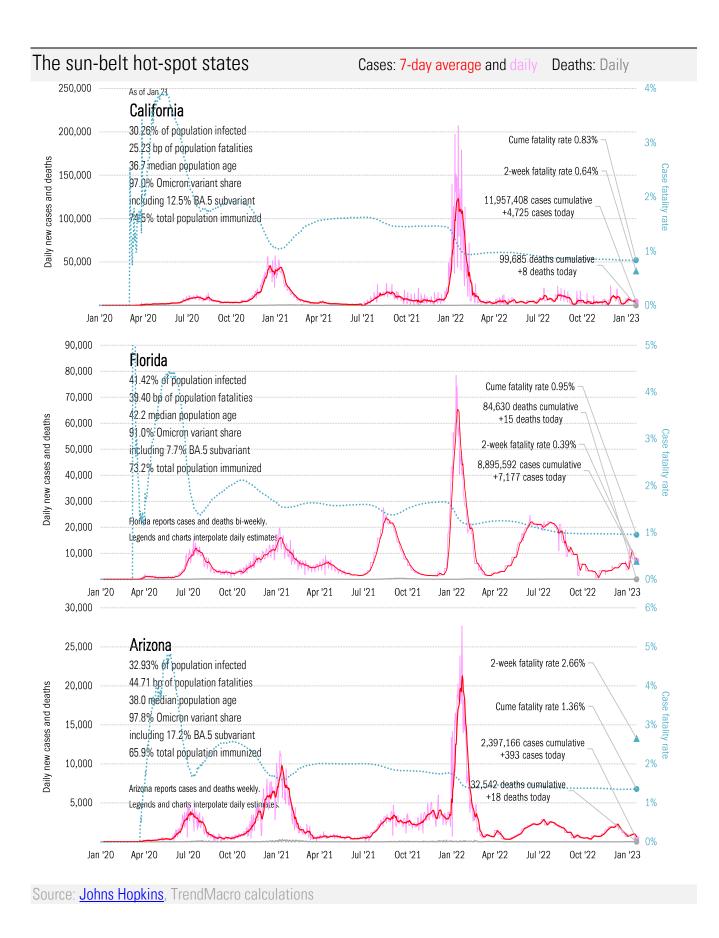
Source: Covid Act Now, TrendMacro calculations

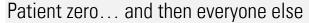
From Ground Zero to the Rio Grande Cases; 7

Cases: 7-day average and daily Deaths: Daily

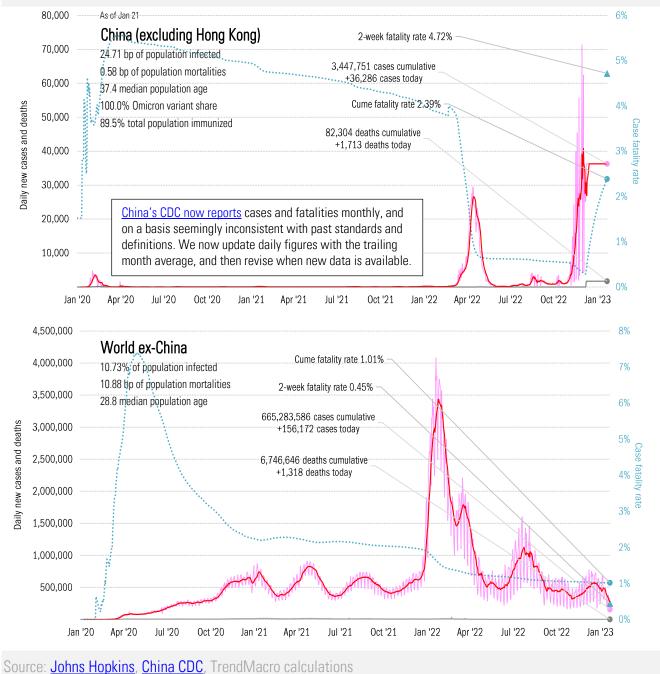


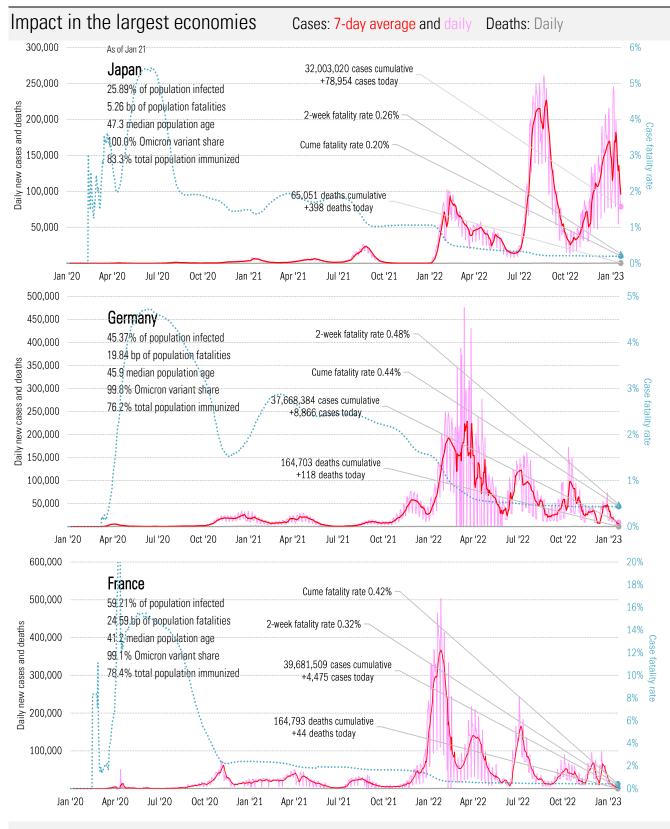
Source: Johns Hopkins, TrendMacro calculations





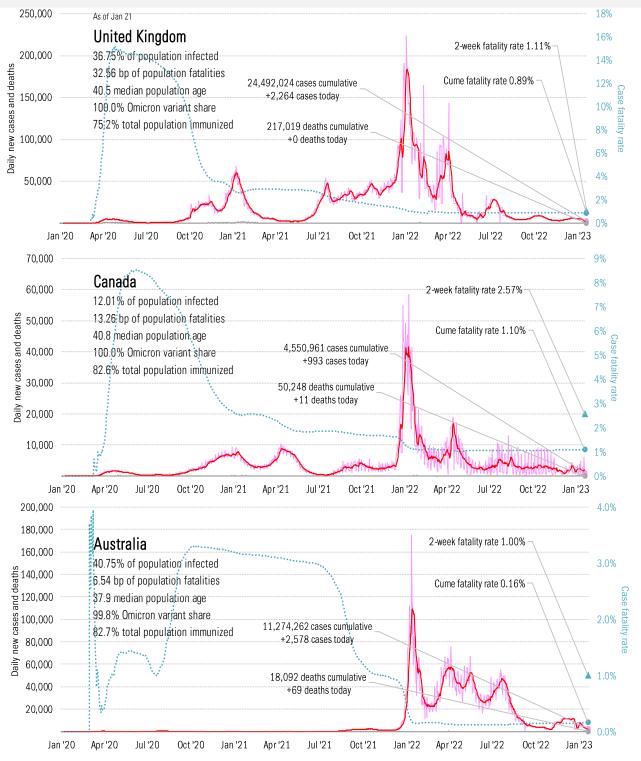
Cases: 7-day average and daily Deaths: Daily



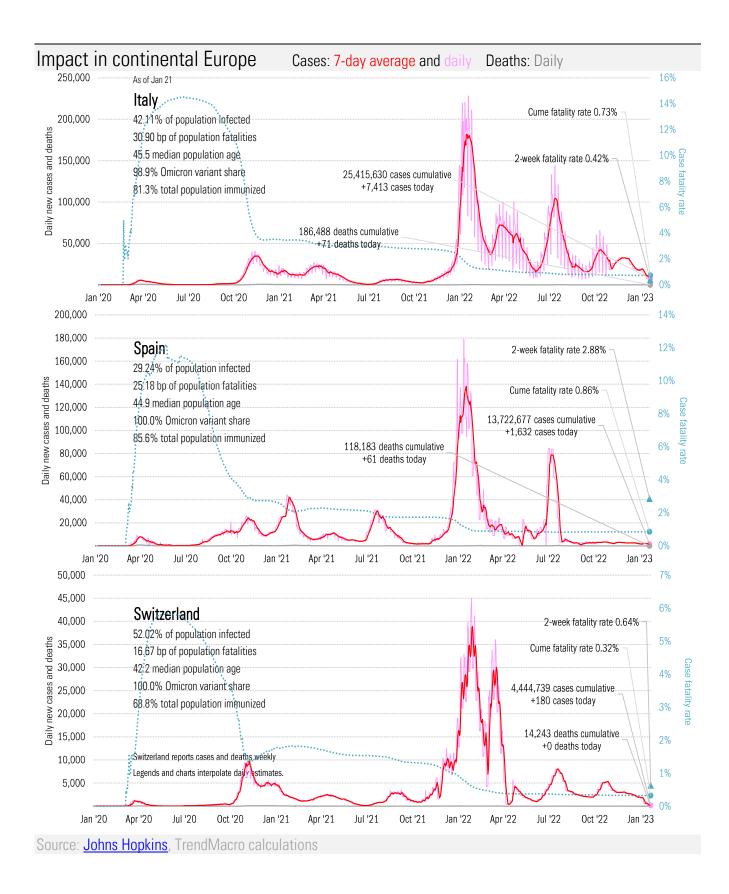


Source: Johns Hopkins, TrendMacro calculations

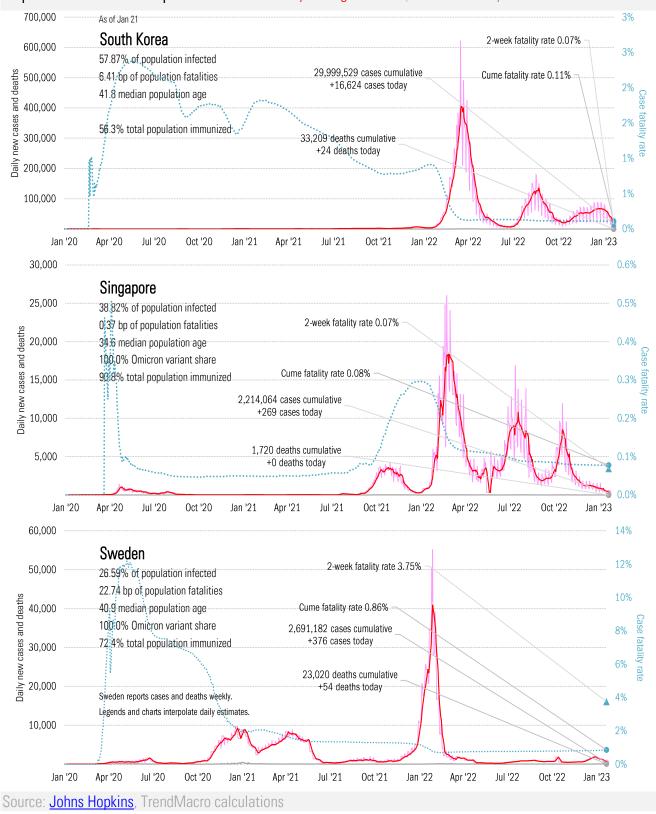




Source: Johns Hopkins, TrendMacro calculations

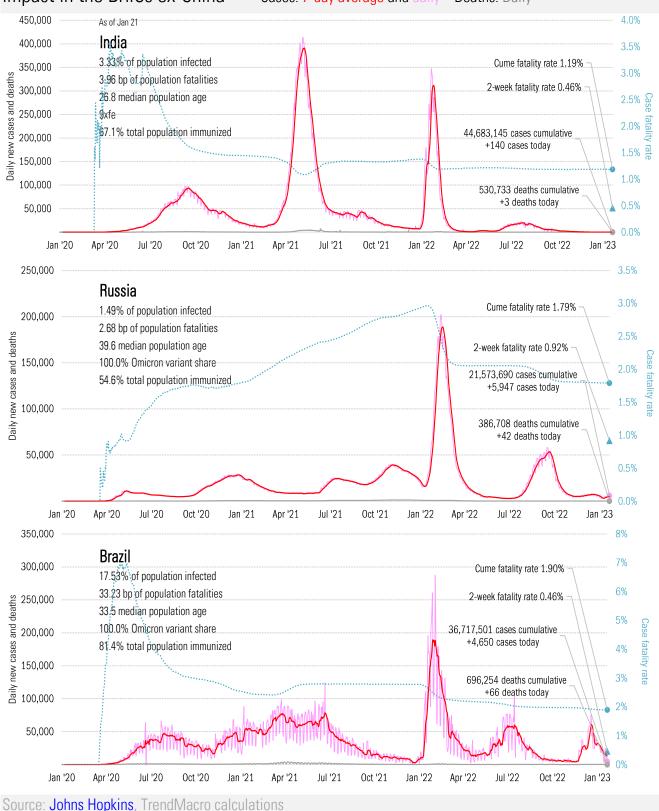


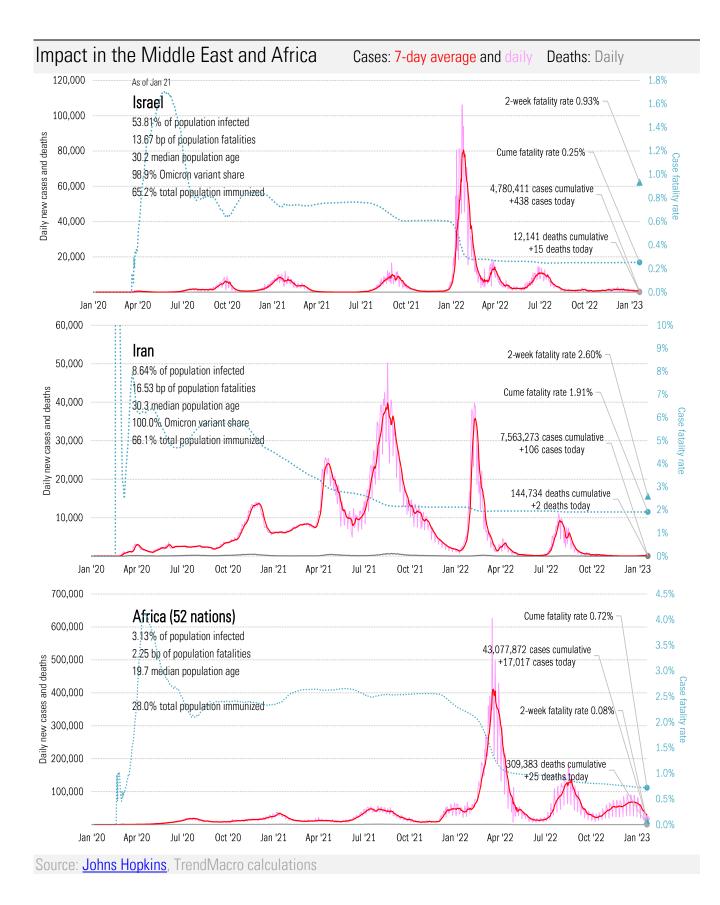
Impact in other hot-spots Cases: 7-day average and daily Deaths: Daily



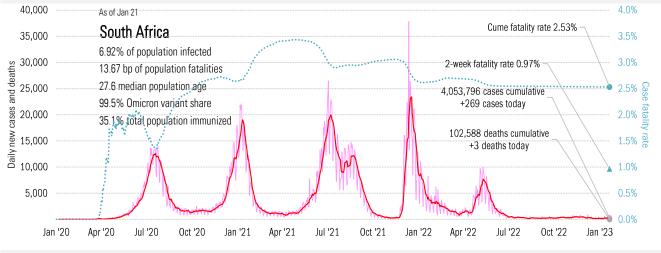
Impact in the BRICs ex-China Cases: 7-day

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