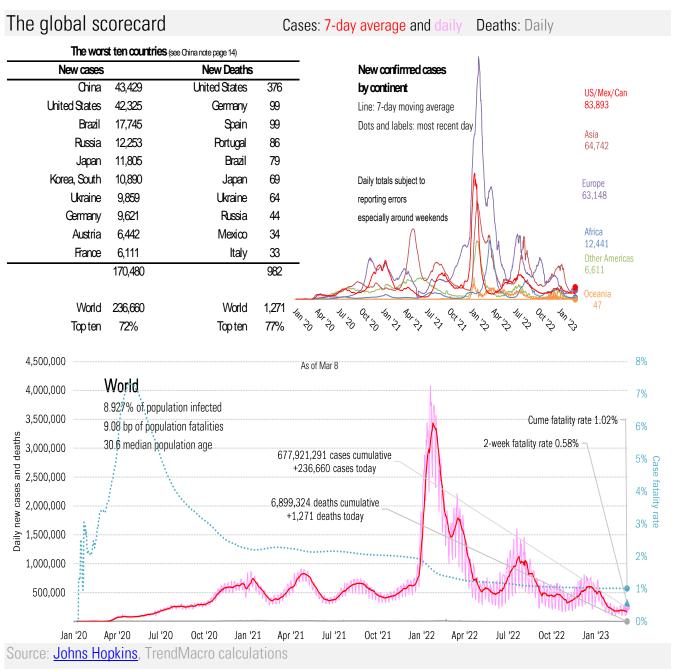


Trend Macrolytics, LLC Donald Luskin, Chief Investment Officer Thomas Demas, Managing Director Michael Warren, Energy Strategist

Data Insights: Covid-2019 Monitor

Thursday, March 9, 2023



For more information contact us: Donald Luskin: 214 550 2020 <u>don@trendmacro.com</u> Thomas Demas: 704 552 3625 tdemas@trendmacro.com

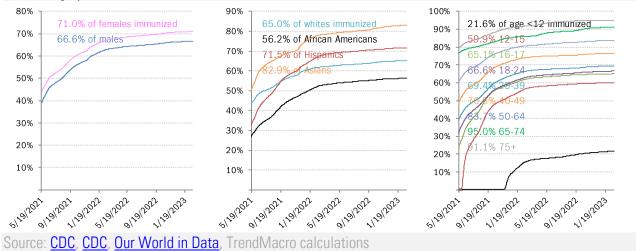
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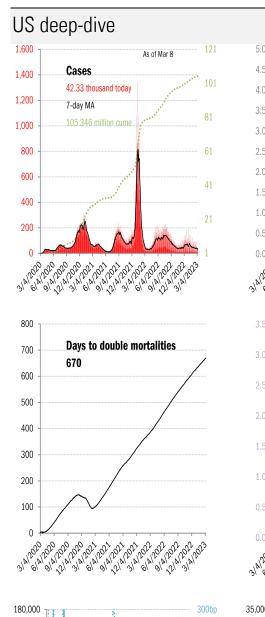
The US scorecard

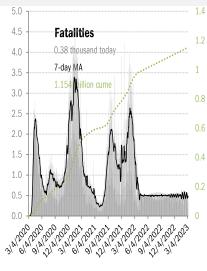
The ten worst US states															
New cas		New dea		Newinl	-	Qume o		Qume d			n hospital	Hospit			Uuse
TX	10,634	R.	79	NC	123		12,110,297	CA	100,954	TX	589,615		87%		88%
R.	8,241	CA	30	R.	233		8,465,925	TX	93,383	CA	569,113	DC			85%
IL	1,795	W	22	MA	105		7,574,590	R.	86,850	Æ	533,587	DE			85%
W	1,706	NY	17	NY	204	NY	6,793,370	NY	77,152	NY	355,154	R	85%		84%
CA	1,383	MA	17	CA	439	L	4,072,972	PA	50,398	CH	244,637	WV			83%
NY	1,340	PA	17	UT	26	PA	3,527,854	GA	42,489	GA	242,582	MN			82%
CH	1,332	MI	16	AR	26 40	NC		MI	42,205	PA	231,031	CT			81%
MI	986	⊫ SC	11 10	AL MO	49 83	CH Ch		CH "	41,749	IL M	214,185	AK			81% 81%
PA TN	982 855	ст СТ	10 9	MO TN	63 66	GA MI	3,068,208 3,064,125	IL NJ	41,443 36,010	MI NJ	180,937 163,467	WA	82% 82%		81%
	29,254	Ci	9 227	IIN	1,334	IVII	55,542,305	NU	612,633	NU	3,324,308		02/0	N	01/0
	23,204		221		1,304		30,042,300		012,000		0,024,000				
All states	42,325		376		2,985	All states	105,346,	170	1,153,757		6,022,328	All states	70%		67%
Topten	69%		60%		45%	Topten	54%		55%		55%	Median			74%
	0070		0070		1070	. op to: .	0170			ne states n	ot reporting				,.
Five most improved US states															
Fewer da	Fewer daily cases Fewer new deaths Fewer new hospitalizations														
MD	-548				NY	-16			TX	-51					
MO	-362				MD	-6			CA	-50					
AZ	-349				MO	-5			IL -	-49					
AR	-120				VA	-2			IN	-42					
W	-108				AR	-2			Ω ·	-34					
1,600,000															12%
	As of I	Mar 8													
1,400,000															
1,400,000	Uni	ted Stat	es												10%
	32 34	1% of popul	ation infec	cted					2-week f			ality rate 1.21%	7		
1,200,000	35 42	2 bp of popu	lation fata	alities											
<i>(</i>)	381 median population age									Cume fatality rate 1.10% \neg 8%					8%
fig 1,000,000	9919	% Omicron v	variant sha	are							Guille latality	Tate 1.10%			
1,000,000 geg geg	69 39	% total popu	ulation imr	munized											Case
		100													6% tata
800,000 Mai / Mai		12	N.						//		46,170 cases 42,325 cases			\	tatality rate
/ nev			A. I.								-2,020 00000	today			rate
.≦ 															4%
			$\sim \lambda_{\rm c}$								1.153.757 de	eaths cumulative	, \ '		4 70
400,000			1944. 1944	·····								eaths today			
					s h				- 1 'N					$\langle $	0.04
200,000	Ą	(MA						ایت بار	a.		$\langle \rangle \ $	2%
200,000					M I V			N							
		~~···			Ŋ	Mart Hitter			η ν ιι'' '	Kuu		IIITAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA			
- Jan	نې ۵۲	or '20 J	lul '20	Oct '20	Jan '21	Apr '21	Jul '21 ()ct '21	Jan '22	Apr '22	2 Jul '22	Oct '22	Jan '2		0%
IIbt															
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									day	Immunity	Full	Partial
Doses		68	8,874,547				+0.073 million			US UK	69.3%	81.2%
							n boosters:		+0.046 million		75.2%	79.7%
		One dose		% Pop		nune	% pop New imr			-	78.4%	80.6%
Total population		277,995,771		83%		236,920,363		71% +0.012		Spain	85.6%	86.9%
Age 12 to 17		18,489,485		73%		15,821,611		63% +0.001 77% +0.007		Germany	76.2%	77.8%
Age 18 to 64		184,796,583		91% 100%		157,013,258				ltaly	81.2%	86.2%
	Age 65 and over		61,113,123		5	53,528,865		+0.001 million		Australia	82.7%	85.0%
Othe										Israel Canada	65.2%	71.2%
3%		1									82.6%	90.4%
Modema 38% Pfizer 59%		Sta	ate	Best						Japan	83.4%	84.4%
				2000						Africa	29.3%	35.5%
		At least part		Midd	le					India	67.2%	72.5%
			pulation	- Territori						Brazil China	81.7%	88.0%
		Full im	,	Wors	.+						89.5%	91.9%
AK		as % po		vv or c						Global data diff		rces, timing
73.0%		"Immunity" = tv	vo doses			WI		As of Mar 3	s of Mar 3		ME	
65.1%						75.2%					95.0%	
						68.2%			-		83.4%	
	WA	ID	MT	ND	MN	IL	MI		NY	VT	NH	
	85.3%	64.0%	68.3%	69.4%	78.9%	79.2%	69.5%		94.5%	95.0%	88.2%	
	76.1%	56.5%	59.2%	58.7%	72.2%	71.4%	62.3%		80.8%	85.8%	72.0%	
	OR	NV	WY	SD	IA	IN	ОН	PA	NJ	MA		
	81.7%	77.7%	60.9%	84.0%	70.7%	64.4%	65.8%	90.7%	94.7%	95.0%		
	72.4%	63.7%	53.0%	66.3%	64.4%	57.8%	60.5%	73.4%	79.2%	84.3%		1
	CA	UT	CO	NE	M0	KY	WV	VA	MD	СТ	RI	
	84.8%	75.4%	83.7%	73.4%	69.4%	68.9%	67.5%	91.0%	91.8%	95.0%	95.0%	
	74.7%	66.8%	73.5%	66.3%	59.1%	59.6%	59.7%	76.6%	79.8%	83.1%	87.8%	
		AZ	NM	KS	AR	TN	NC	SC	DC	DE		
		77.9%	94.5%	76.3%	69.9%	64.4%	92.3%	71.0%	95.0%	88.3%		
		66.1%	75.2%	65.4%	56.9%	56.3%	67.2%	59.9%	90.5%	73.4%		
				OK	LA	MS	AL	GA				
· · · · ·	I			74.7%	62.8%	61.7%	65.0%	68.4%				
HI				60.5%	55.0%	53.7%	53.2%	57.3%		т г		1
91.5%				TX					FL		PR	
81.5%				76.5%					82.5%		90.9%	
				63.3%					69.4%	J I	84.1%	J

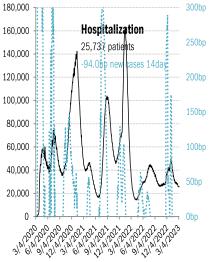
The demographics of US vaccination

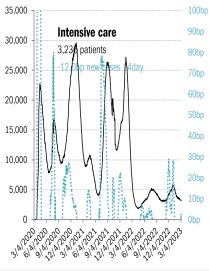


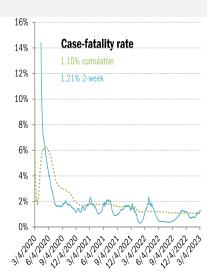


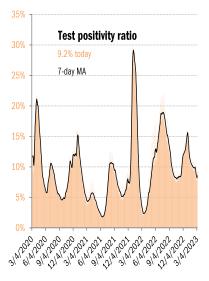


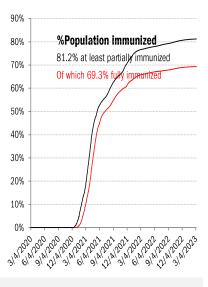




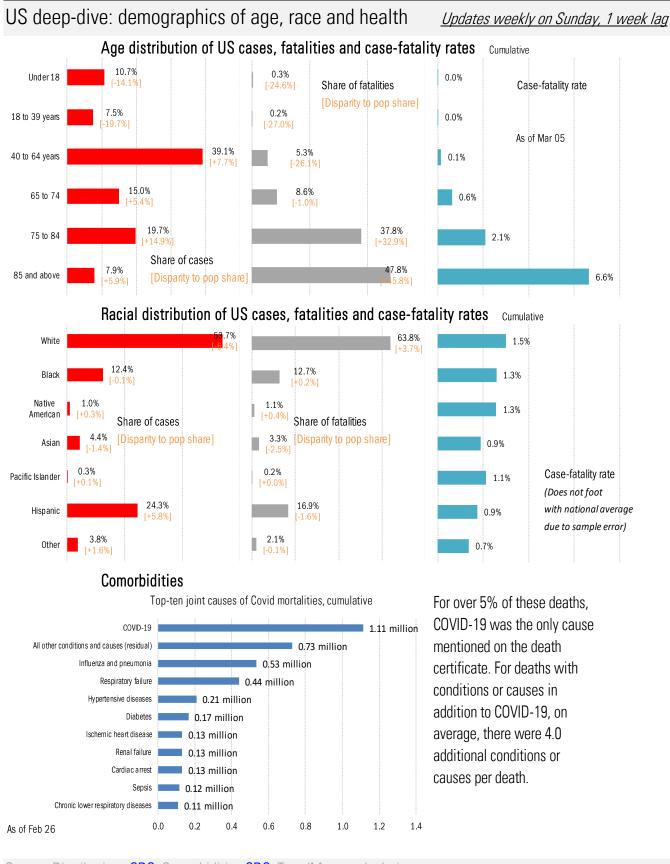








Source: Johns Hopkins, Covid Act Now, TrendMacro calculations



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

Recommended reading

<u>Trump's CDC director says Fauci shut down debate on</u> <u>Covid's origin</u>

Carmen Paun *Politico* March 8, 2023

TONY IN TROUBLE: COVID Origins Committee Focuses on Fauci's Efforts to Disprove Lab Leak

Sean Hannity March 8, 2023

The China syndrome

Alex Berenson *Unreported Truths* March 8, 2023

Meme of the Day

Mayor Adams to New York City Shoppers: Drop That Mask Liam Stack *New York Times* March 6, 2023

Covid Lab Leak Fight Obscures the Global Rise of High-Security Biolabs

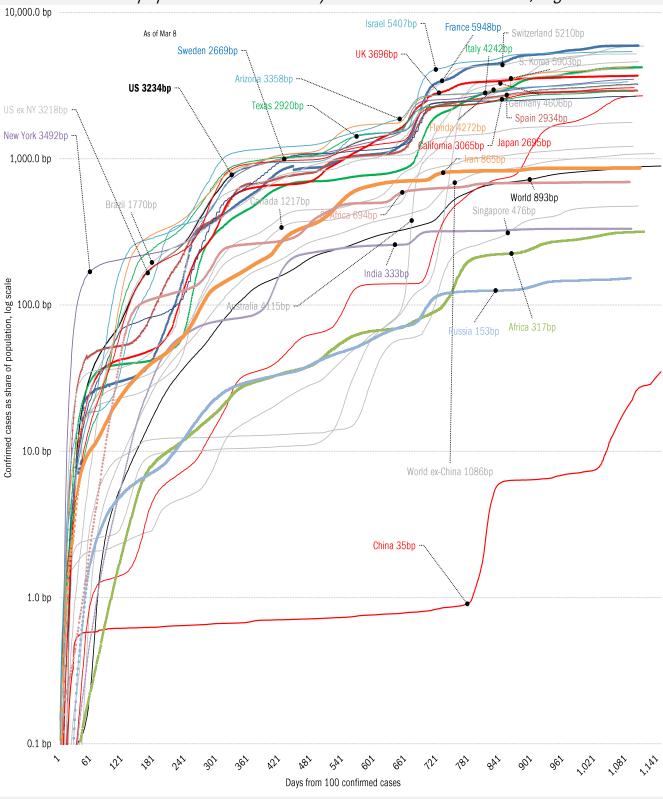
Riley Griffin and Madison Muller *Bloomberg* March 7, 2023

Matt Hancock and the politics of fear

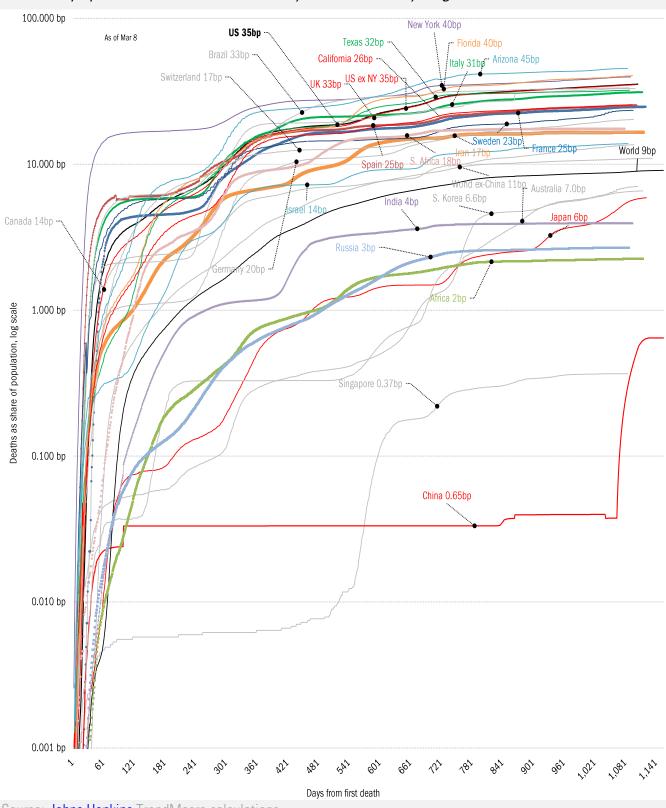
Fraser Nelson *The Spectator* March 5, 2023



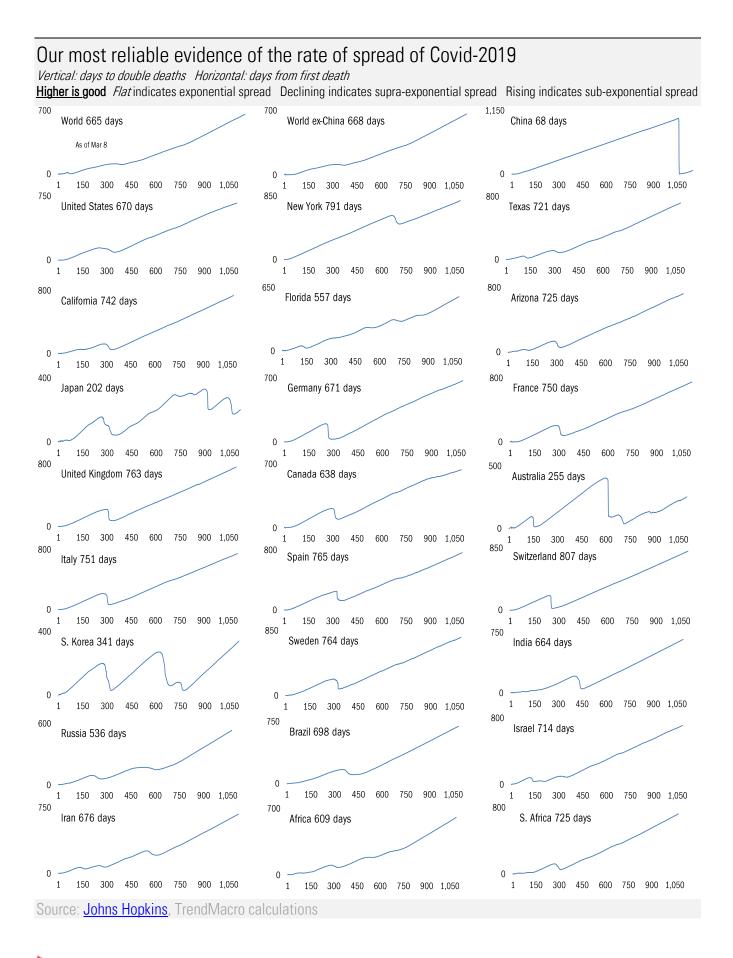
Source: Our beloved clients, Power Line blog "The Week in Pictures" and CTUP

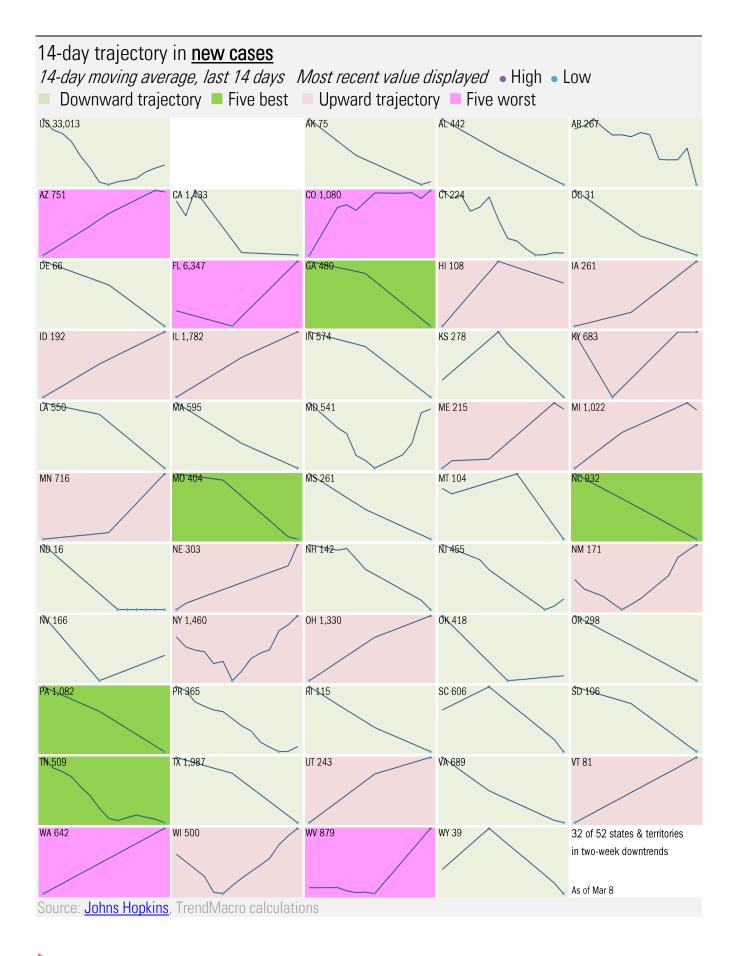


The global coronavirus <u>case</u> accelerometer... tracking the world's infection curves *Share of infected population from first day with 100 confirmed cases, log scale*

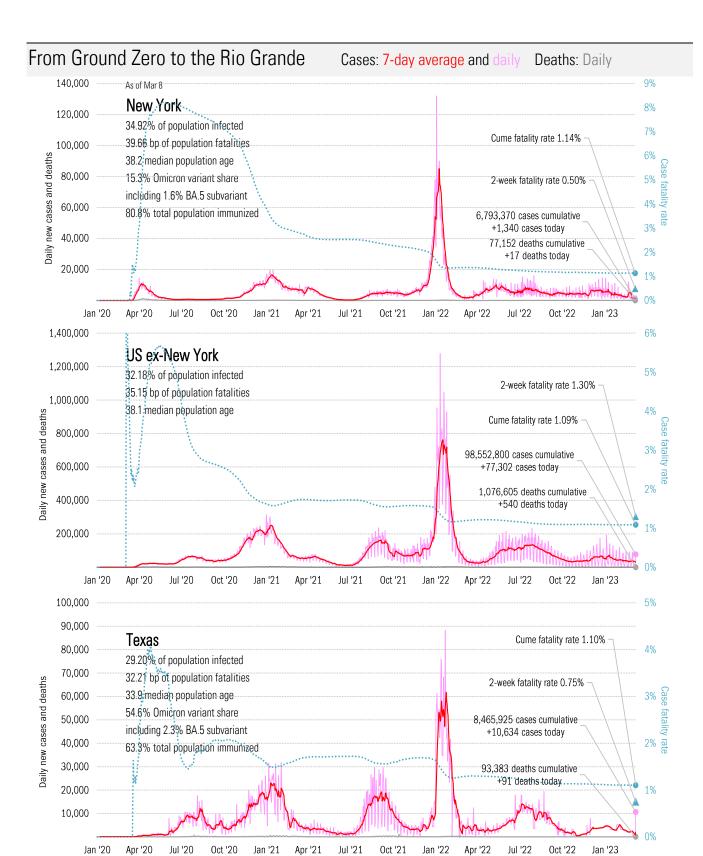


The global coronavirus <u>mortality</u> accelerometer ... tracking the world's fatality curves *Share of population deceased from day of first fatality, log scale*

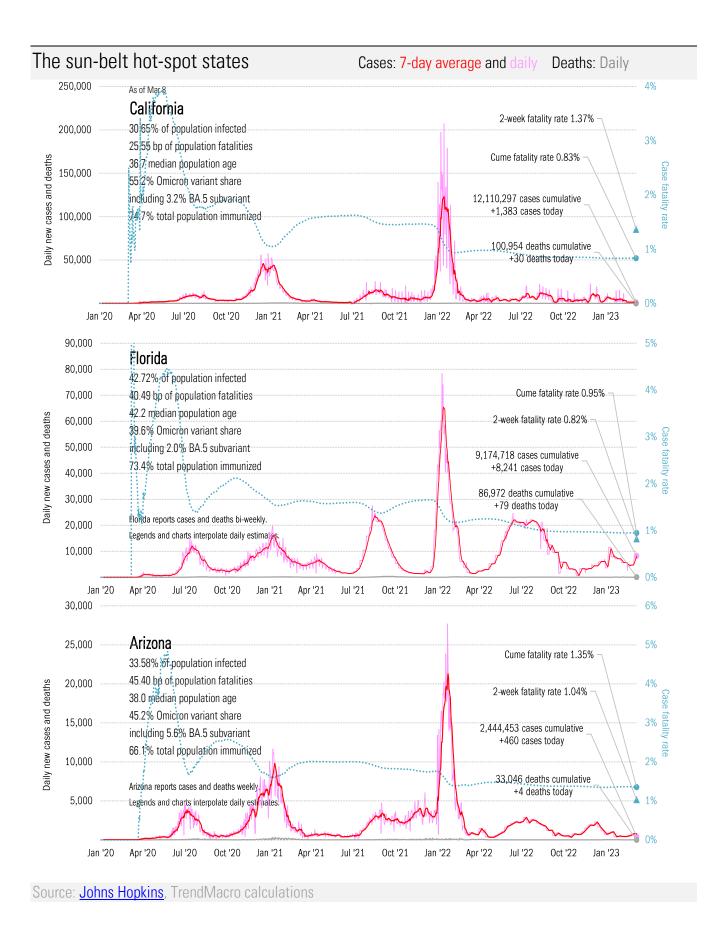


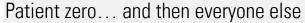


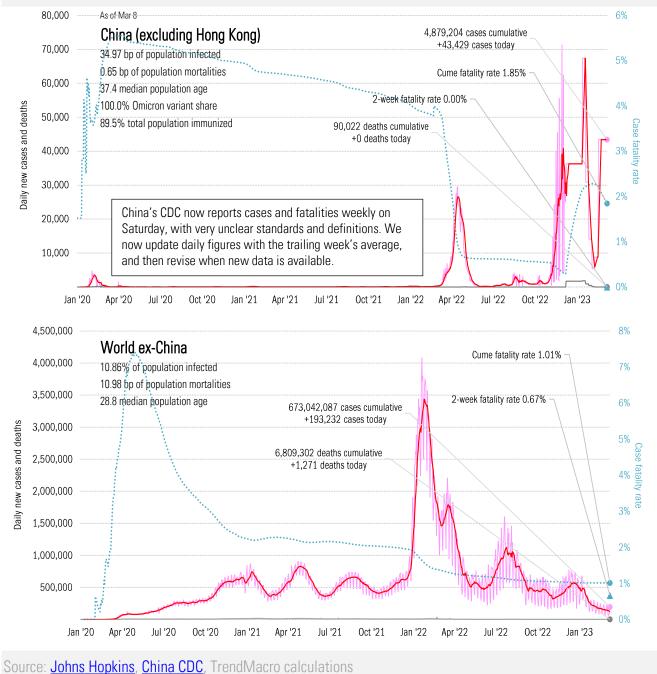


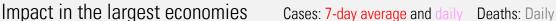


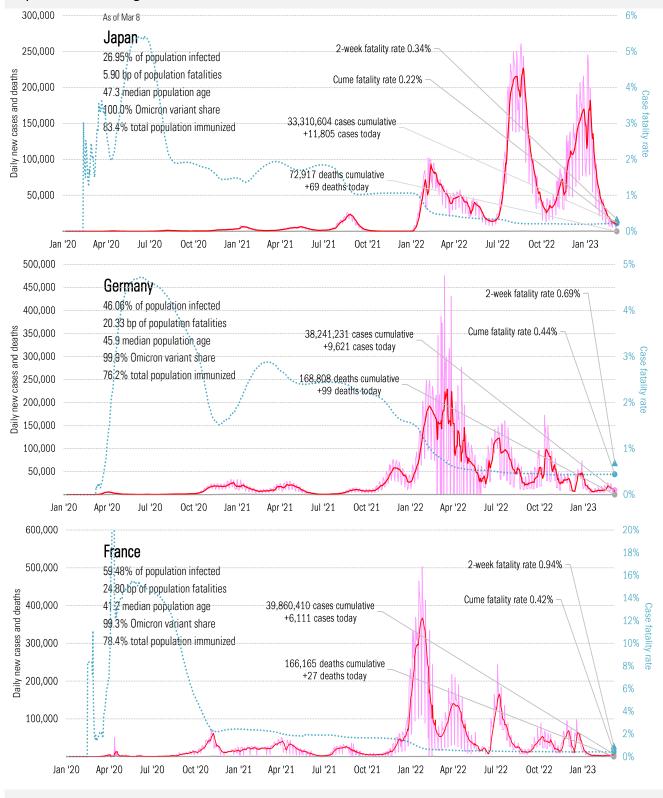
Source: Johns Hopkins, TrendMacro calculations





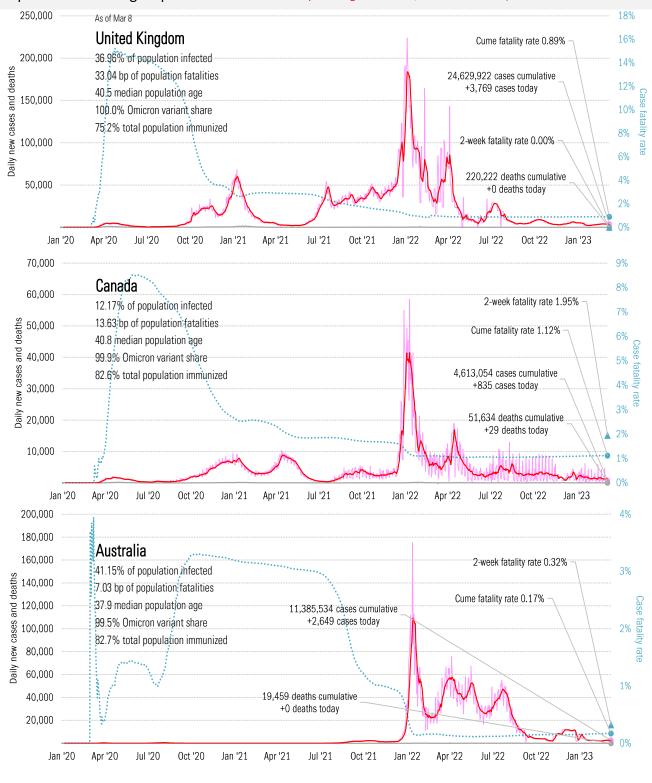


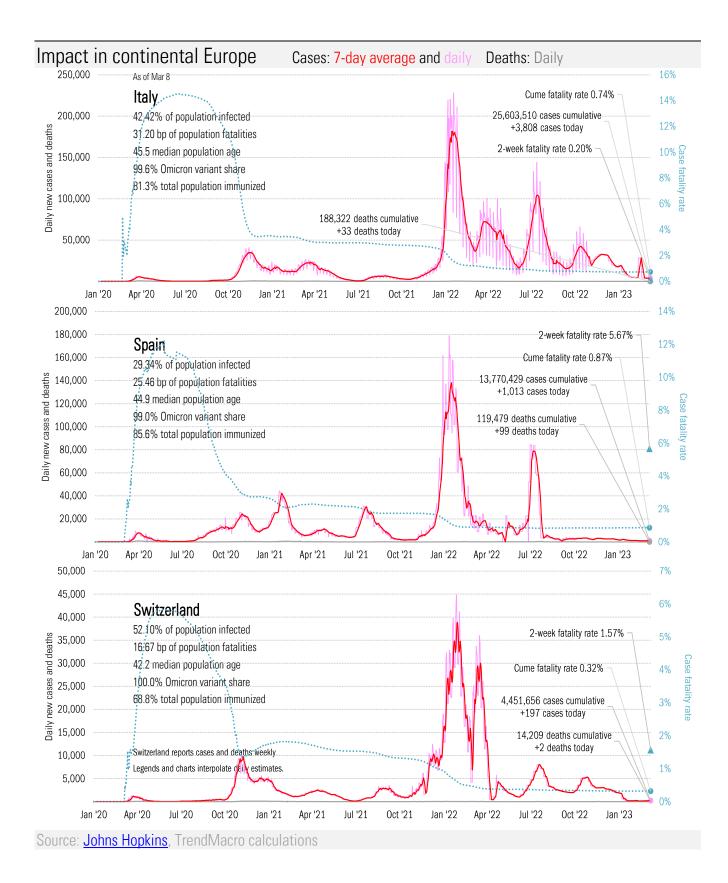


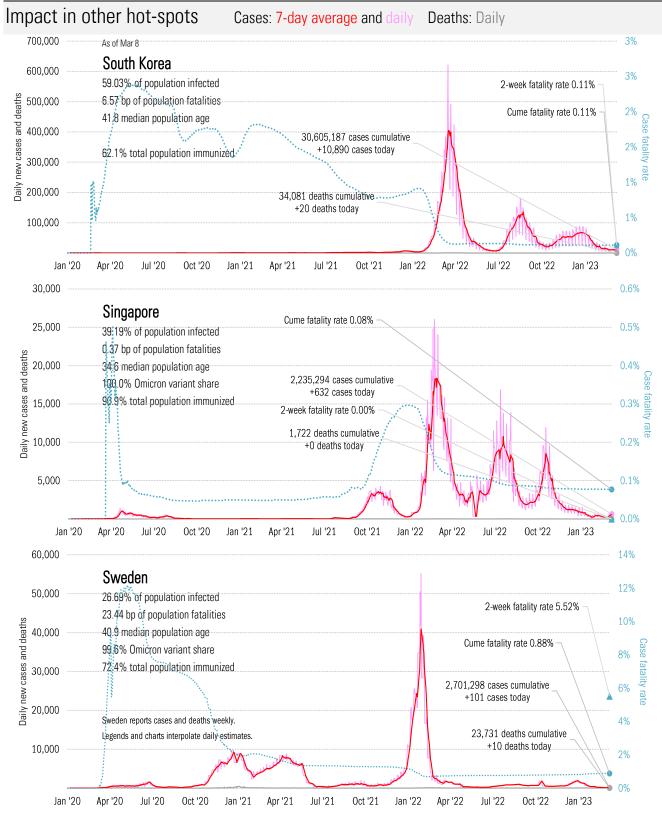


Source: Johns Hopkins, TrendMacro calculations

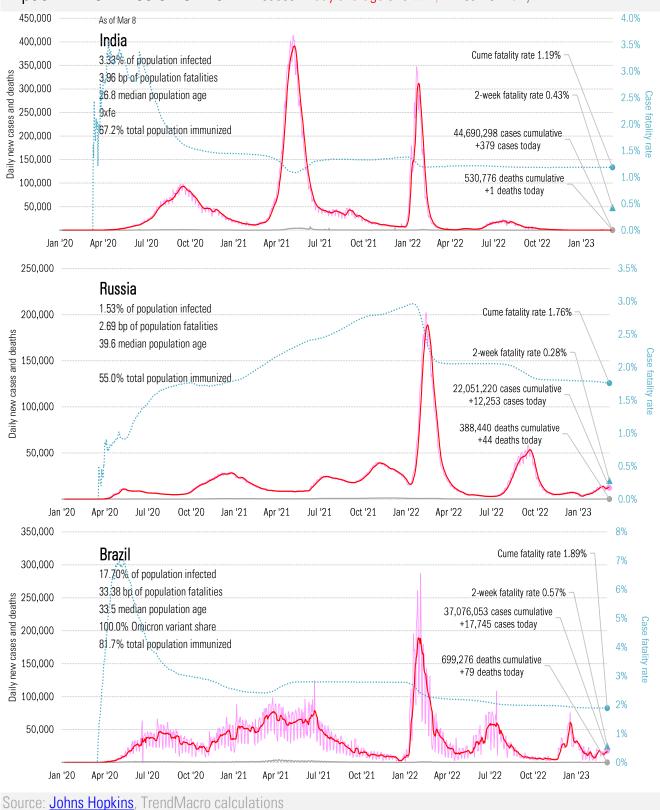
Impact in The Anglosphere Cases: 7-day average and daily Deaths: Daily



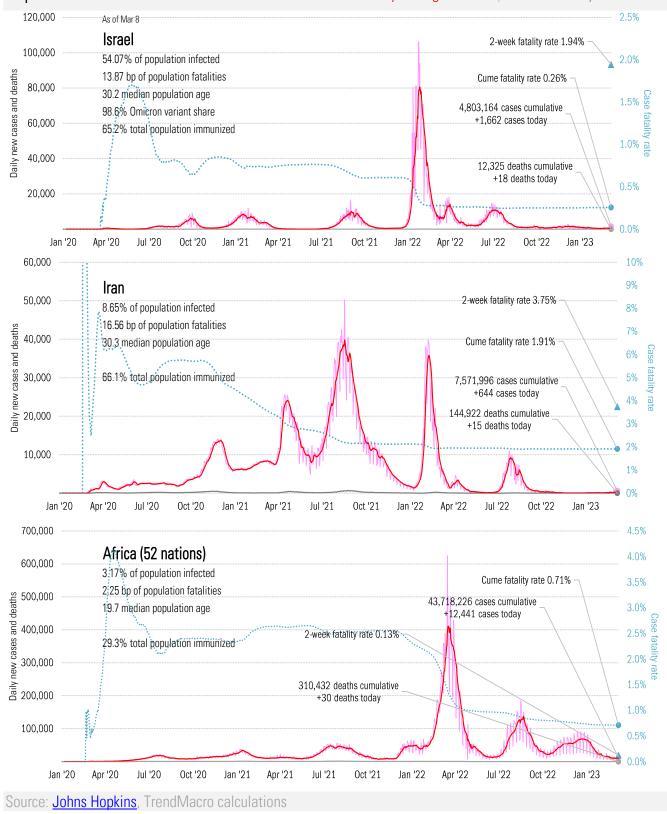




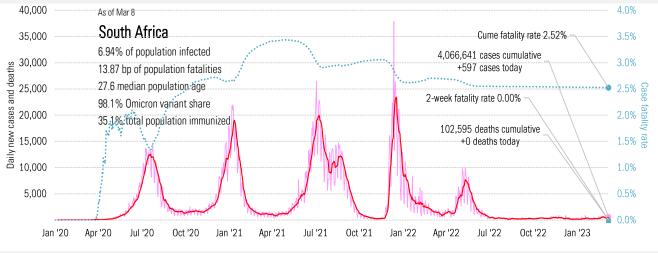
Impact in the BRICs ex-China c



Impact in the Middle East and Africa



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



Source: Johns Hopkins, Trend Macro calculations