

TABLE 21

## CURRENT VALUE OF STOCK MARKET INVESTMENTS

"Do you (or any member of your family living there) have any investments in the stock market, including any publicly traded stock that is directly owned, stocks in mutual funds, stocks in any of your retirement accounts, including 401(K)s, IRAs, or Keogh accounts?"

"Considering all of your (family's) investments in the stock market, overall about how much would your investments be worth today?"

| Year | Under | \$10k    | \$25k    | \$50k    | \$100k    | \$200k    | \$500k | DK, NA | Total | Median | Percentiles |      |     | Cases |
|------|-------|----------|----------|----------|-----------|-----------|--------|--------|-------|--------|-------------|------|-----|-------|
|      | \$10k | to \$24k | to \$49k | to \$99k | to \$199k | to \$499k | and up |        |       | 1000's | 25th        | 75th | Rng |       |
| 1990 | 34    | 18       | 12       | 9        | 6         | 3         | 1      | 17     | 100   | 14     | 5           | 42   | 37  | 1409  |
| 1997 | 13    | 15       | 12       | 16       | 14        | 8         | 5      | 17     | 100   | 50     | 17          | 124  | 107 | 781   |
| 1998 | 14    | 13       | 13       | 14       | 12        | 10        | 5      | 19     | 100   | 49     | 15          | 143  | 128 | 1345  |
| 1999 | 12    | 12       | 12       | 14       | 13        | 11        | 7      | 19     | 100   | 51     | 18          | 151  | 132 | 2779  |
| 2000 | 11    | 12       | 11       | 12       | 12        | 13        | 7      | 22     | 100   | 61     | 19          | 196  | 177 | 2891  |
| 2001 | 10    | 12       | 11       | 13       | 11        | 11        | 6      | 26     | 100   | 60     | 20          | 155  | 135 | 3116  |
| 2002 | 11    | 13       | 13       | 12       | 12        | 11        | 6      | 22     | 100   | 51     | 18          | 151  | 133 | 3303  |
| 2003 | 15    | 15       | 13       | 13       | 11        | 10        | 5      | 18     | 100   | 40     | 13          | 124  | 111 | 3278  |
| 2004 | 14    | 13       | 12       | 15       | 12        | 12        | 6      | 16     | 100   | 50     | 15          | 151  | 136 | 3945  |
| 2005 | 14    | 13       | 12       | 14       | 13        | 12        | 6      | 16     | 100   | 50     | 15          | 151  | 136 | 3973  |
| 2006 | 11    | 12       | 12       | 14       | 13        | 13        | 8      | 17     | 100   | 60     | 20          | 198  | 178 | 3832  |
| 2007 | 11    | 12       | 12       | 13       | 14        | 14        | 9      | 15     | 100   | 70     | 20          | 200  | 180 | 3999  |
| 2008 | 11    | 11       | 11       | 14       | 13        | 14        | 9      | 17     | 100   | 64     | 20          | 200  | 180 | 3972  |
| 2009 | 12    | 11       | 12       | 14       | 13        | 13        | 9      | 16     | 100   | 65     | 20          | 198  | 178 | 4039  |
| 2010 | 9     | 11       | 11       | 14       | 14        | 15        | 10     | 16     | 100   | 79     | 25          | 200  | 175 | 3953  |
| 2011 | 8     | 10       | 10       | 14       | 14        | 16        | 11     | 17     | 100   | 91     | 30          | 247  | 217 | 3869  |
| 2012 | 7     | 9        | 9        | 15       | 14        | 17        | 12     | 17     | 100   | 99     | 35          | 252  | 217 | 3822  |
| 2013 | 8     | 9        | 8        | 14       | 14        | 16        | 14     | 17     | 100   | 101    | 35          | 300  | 265 | 3779  |
| 2014 | 10    | 9        | 8        | 12       | 13        | 17        | 15     | 16     | 100   | 101    | 30          | 301  | 271 | 4006  |
| 2015 | 9     | 10       | 9        | 12       | 13        | 17        | 16     | 14     | 100   | 102    | 30          | 305  | 275 | 3922  |
| 2016 | 10    | 9        | 10       | 13       | 14        | 17        | 15     | 12     | 100   | 100    | 30          | 293  | 263 | 4268  |
| 2017 | 10    | 9        | 8        | 13       | 13        | 16        | 18     | 13     | 100   | 100    | 30          | 352  | 322 | 4877  |
| 2018 | 9     | 9        | 8        | 12       | 13        | 16        | 19     | 14     | 100   | 100    | 30          | 397  | 366 | 5028  |
| 2019 | 10    | 8        | 7        | 11       | 13        | 17        | 20     | 14     | 100   | 131    | 31          | 406  | 375 | 5079  |
| 2020 | 11    | 9        | 7        | 11       | 11        | 17        | 20     | 14     | 100   | 119    | 30          | 409  | 379 | 5371  |
| 2021 | 11    | 8        | 7        | 10       | 11        | 16        | 22     | 15     | 100   | 146    | 30          | 501  | 471 | 5110  |
| 2022 | 10    | 8        | 7        | 10       | 12        | 16        | 21     | 16     | 100   | 128    | 30          | 474  | 444 | 5096  |
| 2023 | 9     | 8        | 7        | 11       | 11        | 17        | 22     | 15     | 100   | 151    | 37          | 494  | 457 | 4963  |
| 2024 | 8     | 7        | 7        | 13       | 10        | 17        | 26     | 12     | 100   | 168    | 48          | 587  | 539 | 408   |