AGE 35 TO 54
TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)

"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?"

Date of Survey		Under $10k	$10k to $24k	$25k to $49k	$50k to $99k	$100k to $199k	$200k to $499k	$500k and up	DK, NA	Total	Median 1000's	Percentiles 25th	Percentiles 75th	Percentiles Rng	Cases
March	1990	34	19	12	11	5	2	0	18	100	14	5	44	39	414
April	1990	28	19	11	14	7	2	0	19	100	18	6	55	49	417
September	1997	11	12	15	18	14	9	4	16	100	53	21	120	98	283
February	1998	12	14	15	10	15	11	4	20	100	52	18	135	117	295
November	1998	12	11	13	17	11	11	5	20	100	58	19	138	119	334
December	1998	9	11	15	17	12	12	4	19	100	56	22	133	111	362
January	1999	10	11	16	19	13	12	5	14	100	58	24	133	110	376
February	1999	12	10	19	15	13	13	5	13	100	54	22	134	113	366
March	1999	12	9	16	18	13	11	5	17	100	55	23	131	108	337
April	1999	11	10	14	16	15	11	5	19	100	56	23	144	121	326
May	1999	10	10	13	16	16	9	6	20	100	57	26	156	131	341
June	1999	10	11	13	15	15	11	7	17	100	57	24	168	145	361
July	1999	11	11	13	16	14	11	8	15	100	58	24	162	138	384
August	1999	11	12	15	15	13	13	6	15	100	54	22	152	130	374
September	1999	9	13	15	16	12	14	6	15	100	57	24	163	139	360
October	1999	7	12	13	17	12	16	6	16	100	64	29	184	156	343
November	1999	8	11	12	18	13	17	7	14	100	73	29	212	183	331
December	1999	9	8	15	15	15	14	8	15	100	77	31	211	181	329
January	2000	10	9	16	13	13	15	7	17	100	70	26	214	188	337
February	2000	8	10	16	13	12	14	6	20	100	65	25	187	162	357
March	2000	6	12	13	16	13	15	5	20	100	68	29	182	153	364
April	2000	7	10	12	15	15	15	6	20	100	84	32	197	165	359
May	2000	6	8	12	14	16	15	7	23	100	86	35	203	168	361
June	2000	9	8	10	14	14	16	6	23	100	83	28	209	181	369
July	2000	8	8	11	14	15	14	6	23	100	77	29	180	151	356
August	2000	10	8	11	14	17	15	7	19	100	86	30	187	157	348
September	2000	9	10	11	15	18	12	7	18	100	85	30	169	139	346
October	2000	10	11	9	15	18	12	8	17	100	81	25	168	142	355
November	2000	10	13	9	15	17	11	5	19	100	74	21	155	134	376
December	2000	9	13	10	13	17	12	7	19	100	74	22	169	147	363
January	2001	7	11	10	16	16	13	7	22	100	75	28	176	148	364
February	2001	7	10	9	15	16	12	10	21	100	84	32	206	174	348
March	2001	8	8	11	14	17	12	8	22	100	82	32	193	161	400
April	2001	10	10	11	13	15	12	7	21	100	77	26	183	157	428
May	2001	9	11	13	12	14	12	5	24	100	66	22	159	137	462
June	2001	8	12	12	13	14	12	6	24	100	70	22	172	151	429
July	2001	7	12	11	13	13	12	6	25	100	71	22	182	160	400
August	2001	7	13	11	17	11	12	7	23	100	70	22	175	153	375
September	2001	7	10	11	19	9	11	5	27	100	61	25	157	131	400
October	2001	8	9	11	18	11	11	5	27	100	63	26	157	131	413
November	2001	9	9	8	16	13	12	5	29	100	67	25	169	144	425
December	2001	9	9	9	17	13	12	4	27	100	72	24	168	144	394

AGE 35 TO 54
TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)

Date of Survey		Under $10k	$10k to $24k	$25k to $49k	$50k to $99k	$100k to $199k	$200k to $499k	$500k and up	DK, NA	Total	Median 1000's	Percentiles 25th	Percentiles 75th	Rng	Cases
January	2002	10	10	10	16	12	11	5	26	100	66	22	161	139	387
February	2002	7	10	13	16	12	12	5	24	100	66	26	163	137	387
March	2002	8	12	14	13	12	12	6	22	100	61	24	156	132	399
April	2002	7	10	14	12	14	15	6	21	100	75	27	177	151	402
May	2002	8	10	14	13	15	15	5	19	100	74	26	166	140	388
June	2002	7	11	14	14	15	15	5	19	100	75	27	166	138	402
July	2002	9	13	11	17	14	13	4	19	100	62	24	145	121	402
August	2002	9	13	13	16	13	12	3	21	100	57	22	140	118	420
September	2002	12	10	12	17	14	11	3	21	100	56	22	143	120	418
October	2002	11	9	14	17	13	12	3	21	100	56	24	144	120	418
November	2002	11	12	12	17	14	12	4	19	100	53	20	143	122	395
December	2002	9	13	13	16	13	13	4	19	100	55	22	155	133	396
January	2003	11	15	12	15	16	12	4	17	100	53	19	142	123	388
February	2003	12	12	14	15	15	11	3	17	100	51	20	125	105	408
March	2003	14	12	13	15	15	12	3	15	100	51	17	124	107	395
April	2003	12	12	15	14	14	11	4	18	100	48	19	126	106	413
August	2003	13	17	15	17	11	10	3	15	100	42	15	104	89	441
September	2003	11	16	13	17	11	11	3	18	100	48	17	117	100	449
October	2003	9	18	12	16	10	13	3	19	100	51	18	131	114	439
November	2003	10	16	12	16	12	11	4	19	100	52	18	129	111	451
December	2003	11	16	13	16	13	10	3	18	100	47	18	126	109	460
January	2004	12	13	15	17	13	9	4	17	100	47	19	115	96	483
February	2004	12	12	14	16	13	11	4	17	100	49	20	138	118	468
March	2004	12	13	12	18	14	12	4	15	100	54	20	143	123	456
April	2004	13	15	11	17	15	12	3	14	100	54	18	143	126	444
May	2004	11	13	12	20	15	11	3	14	100	52	21	120	100	443
June	2004	10	13	14	18	15	12	4	14	100	54	22	135	114	466
July	2004	10	13	14	18	13	13	5	14	100	55	21	151	130	478
August	2004	11	16	13	17	12	13	6	13	100	55	18	155	137	490
September	2004	13	15	11	19	13	11	5	12	100	55	17	140	123	475
October	2004	13	13	12	21	14	11	5	12	100	57	19	135	116	471
November	2004	14	12	11	19	14	11	6	13	100	58	19	144	126	464
December	2004	12	11	14	16	13	14	5	15	100	57	21	168	148	461
January	2005	11	12	14	15	13	14	6	14	100	57	21	182	161	441
February	2005	11	12	13	16	15	14	6	13	100	60	21	183	161	456
March	2005	12	15	11	18	15	11	5	13	100	57	19	148	129	447
April	2005	13	12	11	17	16	12	4	15	100	61	18	144	125	475
May	2005	11	14	13	15	13	13	4	16	100	57	17	141	123	468
June	2005	12	11	12	14	16	14	6	15	100	64	18	161	143	475
July	2005	12	13	12	13	15	14	7	15	100	58	19	169	150	461
August	2005	14	11	11	13	15	14	8	15	100	60	19	186	167	455
September	2005	13	12	12	14	15	14	7	13	100	58	19	179	159	462
October	2005	14	11	11	15	16	13	7	13	100	65	17	164	147	472
November	2005	14	12	11	17	17	12	5	12	100	64	18	135	116	460
December	2005	14	12	9	17	18	11	4	14	100	64	17	133	116	461
January	2006	12	12	10	20	17	12	3	14	100	59	21	129	109	454
February	2006	12	11	9	17	17	13	6	15	100	71	23	163	140	474
March	2006	10	10	10	19	15	15	8	13	100	73	30	189	160	467
April	2006	9	12	15	15	16	14	8	11	100	66	29	185	157	452

AGE 35 TO 54
TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)

Date of Survey		Under $10k	$10k to $24k	$25k to $49k	$50k to $99k	$100k to $199k	$200k to $499k	$500k and up	DK, NA	Total	Median 1000's	Percentiles 25th	Percentiles 75th	Rng	Cases
May	2006	8	13	16	15	15	15	5	12	100	55	27	166	140	429
June	2006	8	14	16	15	16	16	4	11	100	58	25	156	131	417
July	2006	8	13	13	17	16	16	5	12	100	63	27	166	140	426
August	2006	8	12	11	18	17	15	8	11	100	77	28	183	155	440
September	2006	9	12	12	16	16	14	8	13	100	73	23	185	162	439
October	2006	9	12	11	15	16	15	8	14	100	76	22	197	175	423
November	2006	8	13	12	16	14	14	9	15	100	68	23	197	174	415
December	2006	6	11	14	17	14	13	9	16	100	69	30	190	160	418
January	2007	6	12	13	19	15	13	8	15	100	71	30	181	150	450
February	2007	8	12	12	19	15	13	7	13	100	68	27	165	138	460
March	2007	11	14	11	18	16	13	6	11	100	61	20	154	134	459
April	2007	12	14	11	15	17	14	7	11	100	68	19	166	147	443
May	2007	12	11	11	15	16	16	8	10	100	78	22	202	180	415
June	2007	9	11	11	17	17	16	9	11	100	84	27	204	177	428
July	2007	7	12	11	18	14	18	7	13	100	79	28	209	182	421
August	2007	7	15	10	16	15	17	6	14	100	71	25	193	168	425
September	2007	9	13	11	14	13	20	6	14	100	73	22	210	188	416
October	2007	9	13	12	12	14	17	9	14	100	78	23	216	193	427
November	2007	10	12	11	13	14	17	9	14	100	81	23	213	190	426
December	2007	9	13	12	13	14	16	9	13	100	74	23	202	179	414
January	2008	10	15	11	15	14	16	6	13	100	64	20	188	168	398
February	2008	10	13	13	15	12	18	6	13	100	65	23	203	180	415
March	2008	9	12	13	16	12	17	7	14	100	66	25	197	172	434
April	2008	10	10	15	15	12	18	7	13	100	63	26	202	176	443
May	2008	10	9	13	17	13	15	7	14	100	60	28	187	159	419
June	2008	13	9	12	17	13	17	6	12	100	63	25	189	164	414
July	2008	13	9	12	17	13	16	6	14	100	64	25	174	149	396
August	2008	13	9	13	16	14	17	6	12	100	72	26	181	155	434
September	2008	10	10	13	18	15	18	6	10	100	71	29	187	158	431
October	2008	10	10	12	19	16	18	6	9	100	77	32	186	154	453
November	2008	10	11	14	19	16	15	6	10	100	65	29	169	140	443
December	2008	12	13	13	16	15	13	5	13	100	60	24	157	133	458
January	2009	12	16	12	14	14	12	6	14	100	52	20	158	138	448
February	2009	15	15	12	14	13	12	6	14	100	50	15	153	138	457
March	2009	14	13	13	13	13	13	6	14	100	56	17	155	139	440
April	2009	13	11	14	14	15	12	6	15	100	63	18	153	135	439
May	2009	11	13	12	14	17	13	6	14	100	69	21	153	133	425
June	2009	13	12	12	16	17	12	7	12	100	65	21	149	128	435
July	2009	14	11	14	16	14	13	7	11	100	60	21	164	143	444
August	2009	14	11	16	18	13	10	6	12	100	52	20	145	125	450
September	2009	12	12	15	17	14	11	5	14	100	58	20	151	131	441
October	2009	11	14	12	15	17	12	5	14	100	73	20	156	136	420
November	2009	9	13	12	13	15	16	6	15	100	79	23	190	168	403
December	2009	9	12	11	15	15	17	7	14	100	82	25	202	176	386
January	2010	10	10	14	15	13	16	9	13	100	73	26	214	188	392
February	2010	10	12	15	16	13	14	8	12	100	66	24	183	159	379
March	2010	12	13	15	14	11	15	8	12	100	63	20	188	168	386
April	2010	10	15	13	16	13	15	6	12	100	65	20	170	150	384
May	2010	8	13	11	15	16	17	6	14	100	81	24	201	177	378
June	2010	7	11	13	15	18	15	6	14	100	79	28	177	149	378

AGE 35 TO 54
TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)

Date of Survey		Under $10k	$10k to $24k	$25k to $49k	$50k to $99k	$100k to $199k	$200k to $499k	$500k and up	DK, NA	Total	Median 1000's	Percentiles 25th	Percentiles 75th	Percentiles Rng	Cases
July	2010	9	11	13	13	16	13	7	17	100	69	25	173	148	373
August	2010	12	12	12	13	15	13	7	15	100	57	21	172	151	380
September	2010	13	14	10	13	13	16	6	15	100	55	18	190	172	371
October	2010	10	14	9	16	15	17	6	13	100	67	23	199	176	392
November	2010	8	12	9	16	17	16	8	14	100	82	30	203	173	400
December	2010	5	12	12	16	18	15	9	14	100	79	33	192	159	402
January	2011	5	10	16	15	18	14	8	15	100	77	33	194	160	370
February	2011	6	10	15	17	16	15	7	14	100	73	31	196	165	357
March	2011	8	10	12	17	16	17	7	14	100	83	30	214	184	350
April	2011	10	11	8	18	14	18	8	13	100	82	27	231	204	376
May	2011	9	12	8	16	15	18	9	13	100	83	24	227	204	376
June	2011	9	12	10	16	14	17	8	14	100	76	23	230	206	379
July	2011	8	12	12	14	16	15	10	14	100	82	25	223	197	342
August	2011	7	13	11	13	16	17	9	14	100	86	29	227	197	334
September	2011	5	12	9	15	15	18	11	14	100	93	33	235	202	327
October	2011	6	12	8	16	16	18	9	15	100	84	33	220	187	359
November	2011	6	12	11	16	17	16	9	14	100	80	32	202	170	362
December	2011	8	9	14	15	19	14	7	14	100	80	31	182	151	350
January	2012	6	11	15	16	17	15	7	14	100	77	32	179	147	330
February	2012	7	9	15	17	13	14	9	16	100	71	31	190	159	329
March	2012	9	10	15	17	12	13	10	13	100	68	29	187	159	342
April	2012	11	8	15	19	14	13	9	11	100	75	29	181	151	351
May	2012	10	8	13	17	16	17	9	10	100	90	33	216	183	358
June	2012	10	8	11	16	17	17	9	13	100	93	32	222	190	350
July	2012	7	10	11	14	18	18	9	15	100	100	32	232	200	346
August	2012	6	9	11	16	18	17	8	16	100	94	35	216	181	336
September	2012	4	9	10	16	19	18	8	16	100	101	40	220	180	326
October	2012	5	9	10	18	17	16	10	14	100	94	40	221	181	332
November	2012	7	9	11	19	15	15	9	15	100	81	34	196	163	334
December	2012	6	9	12	19	13	19	9	14	100	93	34	231	197	323
January	2013	6	9	13	18	13	20	7	15	100	89	36	228	192	313
February	2013	5	10	13	14	14	24	6	13	100	103	38	252	215	304
March	2013	6	10	13	14	15	20	6	15	100	89	35	220	185	333
April	2013	8	11	10	14	13	20	8	15	100	87	30	231	201	327
May	2013	9	10	9	18	13	16	11	14	100	80	32	249	217	333
June	2013	11	11	8	18	12	18	12	10	100	79	28	257	229	309
July	2013	10	9	9	19	15	18	11	10	100	85	32	248	216	325
August	2013	9	9	9	18	16	17	12	11	100	98	34	249	215	313
September	2013	6	9	9	19	16	16	12	14	100	103	41	274	233	316
October	2013	7	9	8	17	15	16	13	15	100	105	38	283	245	284
November	2013	8	10	8	18	11	17	14	15	100	92	37	300	263	286
December	2013	10	9	8	18	11	18	13	14	100	88	35	285	250	298
January	2014	10	8	7	18	12	17	16	12	100	98	38	335	297	303
February	2014	10	8	6	14	16	20	15	11	100	122	41	315	274	296
March	2014	9	9	6	13	18	17	16	12	100	123	39	296	257	289
April	2014	8	8	10	13	16	20	13	12	100	115	41	263	222	292
May	2014	7	9	12	13	15	19	13	12	100	110	37	251	214	294
June	2014	9	8	12	13	15	19	13	11	100	109	37	247	210	299
July	2014	12	7	10	13	18	18	12	10	100	110	33	250	217	291
August	2014	14	5	10	12	16	19	13	12	100	125	30	292	262	294

AGE 35 TO 54
TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)

Date of Survey		Under $10k	$10k to $24k	$25k to $49k	$50k to $99k	$100k to $199k	$200k to $499k	$500k and up	DK, NA	Total	Median 1000's	Percentiles 25th	Percentiles 75th	Percentiles Rng	Cases
September	2014	13	5	8	15	16	21	13	10	100	126	36	325	288	291
October	2014	10	6	9	15	15	20	13	12	100	119	36	310	274	301
November	2014	10	6	9	17	18	18	10	13	100	89	36	260	224	311
December	2014	8	9	11	14	16	17	9	17	100	89	30	260	230	302
January	2015	7	9	10	15	14	18	10	16	100	93	32	273	242	317
February	2015	7	10	11	15	14	16	13	13	100	90	33	276	244	312
March	2015	9	9	12	17	14	16	13	11	100	85	32	266	234	329
April	2015	9	9	10	14	18	16	12	13	100	103	38	266	228	327
May	2015	8	8	10	14	18	17	12	12	100	108	38	274	236	328
June	2015	6	8	10	15	19	20	12	10	100	113	43	280	237	316
July	2015	6	8	12	16	18	16	14	10	100	101	39	271	232	314
August	2015	5	9	11	13	18	16	16	12	100	107	38	314	275	323
September	2015	6	10	9	14	17	16	14	15	100	104	37	293	256	328
October	2015	6	12	9	11	14	20	14	14	100	112	35	323	288	337
November	2015	7	13	10	11	14	20	13	11	100	105	32	299	267	338
December	2015	7	13	11	11	14	19	16	10	100	110	31	322	290	360
January	2016	6	10	10	14	17	18	13	11	100	103	37	279	242	347
February	2016	7	8	13	15	16	18	13	11	100	95	40	271	231	340
March	2016	8	6	12	17	16	17	12	12	100	89	42	259	217	331
April	2016	8	8	10	16	15	20	12	11	100	102	42	284	242	334
May	2016	9	9	7	16	16	21	11	11	100	109	39	266	227	334
June	2016	7	11	8	15	18	21	10	10	100	108	34	259	225	335
July	2016	9	11	11	14	18	18	10	10	100	93	29	244	215	344
August	2016	8	9	12	17	17	17	12	9	100	88	35	247	212	377
September	2016	10	8	11	16	18	17	12	8	100	90	33	237	204	396
October	2016	9	9	8	17	18	18	12	10	100	93	34	253	219	397
November	2016	9	10	8	15	19	19	10	10	100	99	31	249	218	391
December	2016	7	9	9	14	19	21	10	11	100	101	36	260	224	395
January	2017	7	9	13	14	16	23	8	10	100	91	33	248	215	419
February	2017	7	9	12	15	17	22	10	9	100	98	39	273	234	423
March	2017	9	8	10	13	16	22	11	10	100	103	38	273	235	422
April	2017	9	9	7	16	18	18	13	10	100	105	38	269	232	404
May	2017	8	10	8	16	14	20	12	12	100	99	33	251	218	400
June	2017	7	9	8	17	14	21	15	9	100	112	38	292	254	408
July	2017	7	10	9	14	15	23	14	9	100	118	38	295	257	419
August	2017	7	8	8	14	16	22	16	9	100	125	44	327	283	413
September	2017	7	9	8	13	15	20	16	13	100	112	41	334	293	422
October	2017	7	7	7	16	13	19	19	13	100	109	44	381	338	424
November	2017	7	8	9	14	12	20	18	13	100	116	39	374	335	413
December	2017	8	7	10	15	14	18	19	8	100	117	41	371	330	412