

AGE 55 AND UP

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 | | | Cases |
|----------------|------|-------------|----------------|----------------|----------------|------------------|------------------|---------------|--------|-------|---------------|-------------|------|-----|-------|
| | | | | | | | | | | | | 25th | 75th | Rng | |
| March | 1990 | 17 | 17 | 12 | 13 | 11 | 6 | 2 | 20 | 100 | 33 | 14 | 96 | 82 | 285 |
| April | 1990 | 15 | 12 | 13 | 12 | 14 | 6 | 3 | 24 | 100 | 40 | 14 | 113 | 99 | 304 |
| September | 1997 | 2 | 6 | 9 | 21 | 21 | 11 | 10 | 20 | 100 | 94 | 52 | 208 | 156 | 153 |
| February | 1998 | 4 | 8 | 12 | 13 | 17 | 10 | 8 | 30 | 100 | 90 | 34 | 180 | 146 | 181 |
| November | 1998 | 4 | 5 | 8 | 10 | 23 | 16 | 9 | 26 | 100 | 121 | 65 | 256 | 191 | 188 |
| December | 1998 | 6 | 8 | 8 | 12 | 21 | 16 | 7 | 22 | 100 | 108 | 50 | 229 | 179 | 191 |
| January | 1999 | 5 | 8 | 9 | 11 | 18 | 17 | 7 | 25 | 100 | 107 | 48 | 255 | 207 | 182 |
| February | 1999 | 4 | 9 | 8 | 11 | 17 | 14 | 7 | 30 | 100 | 107 | 41 | 244 | 202 | 175 |
| March | 1999 | 3 | 6 | 7 | 12 | 17 | 12 | 7 | 37 | 100 | 111 | 47 | 233 | 187 | 169 |
| April | 1999 | 3 | 5 | 7 | 13 | 17 | 11 | 6 | 38 | 100 | 100 | 48 | 212 | 164 | 175 |
| May | 1999 | 3 | 3 | 9 | 16 | 17 | 12 | 8 | 32 | 100 | 100 | 48 | 215 | 167 | 177 |
| June | 1999 | 5 | 3 | 7 | 17 | 17 | 10 | 12 | 28 | 100 | 103 | 51 | 266 | 215 | 174 |
| July | 1999 | 7 | 4 | 6 | 16 | 15 | 13 | 16 | 23 | 100 | 129 | 49 | 329 | 280 | 166 |
| August | 1999 | 8 | 6 | 5 | 11 | 17 | 14 | 14 | 26 | 100 | 137 | 44 | 319 | 275 | 166 |
| September | 1999 | 6 | 7 | 7 | 11 | 15 | 18 | 12 | 25 | 100 | 144 | 46 | 314 | 267 | 169 |
| October | 1999 | 5 | 6 | 7 | 11 | 19 | 15 | 9 | 28 | 100 | 115 | 45 | 236 | 191 | 180 |
| November | 1999 | 5 | 6 | 6 | 11 | 18 | 13 | 14 | 27 | 100 | 118 | 55 | 329 | 274 | 184 |
| December | 1999 | 6 | 5 | 4 | 9 | 21 | 11 | 14 | 31 | 100 | 122 | 61 | 350 | 288 | 192 |
| January | 2000 | 4 | 5 | 7 | 6 | 18 | 15 | 15 | 31 | 100 | 140 | 59 | 411 | 351 | 197 |
| February | 2000 | 2 | 6 | 9 | 6 | 16 | 17 | 14 | 30 | 100 | 143 | 51 | 384 | 333 | 194 |
| March | 2000 | 2 | 5 | 11 | 8 | 15 | 19 | 15 | 24 | 100 | 138 | 50 | 374 | 324 | 192 |
| April | 2000 | 6 | 5 | 8 | 9 | 14 | 18 | 15 | 25 | 100 | 139 | 49 | 352 | 303 | 191 |
| May | 2000 | 8 | 4 | 7 | 8 | 13 | 17 | 16 | 28 | 100 | 155 | 49 | 392 | 342 | 194 |
| June | 2000 | 9 | 3 | 7 | 6 | 10 | 18 | 14 | 33 | 100 | 162 | 38 | 396 | 358 | 196 |
| July | 2000 | 5 | 4 | 7 | 6 | 11 | 18 | 11 | 38 | 100 | 164 | 50 | 371 | 321 | 194 |
| August | 2000 | 3 | 4 | 8 | 7 | 13 | 21 | 11 | 34 | 100 | 174 | 63 | 349 | 286 | 196 |
| September | 2000 | 1 | 7 | 8 | 8 | 14 | 21 | 12 | 30 | 100 | 178 | 64 | 349 | 284 | 205 |
| October | 2000 | 5 | 9 | 7 | 7 | 12 | 20 | 14 | 27 | 100 | 158 | 44 | 370 | 325 | 203 |
| November | 2000 | 6 | 8 | 6 | 8 | 12 | 19 | 11 | 31 | 100 | 142 | 42 | 339 | 297 | 189 |
| December | 2000 | 5 | 9 | 7 | 8 | 9 | 19 | 11 | 33 | 100 | 129 | 41 | 362 | 321 | 166 |
| January | 2001 | 3 | 8 | 9 | 9 | 10 | 20 | 11 | 30 | 100 | 134 | 49 | 339 | 290 | 170 |
| February | 2001 | 3 | 9 | 12 | 8 | 10 | 20 | 10 | 27 | 100 | 125 | 37 | 311 | 274 | 193 |
| March | 2001 | 6 | 7 | 10 | 8 | 16 | 19 | 9 | 25 | 100 | 139 | 40 | 248 | 209 | 207 |
| April | 2001 | 5 | 7 | 9 | 10 | 16 | 17 | 11 | 25 | 100 | 142 | 41 | 282 | 241 | 215 |
| May | 2001 | 5 | 5 | 7 | 12 | 13 | 14 | 12 | 30 | 100 | 122 | 44 | 290 | 246 | 207 |
| June | 2001 | 4 | 6 | 8 | 11 | 10 | 14 | 13 | 35 | 100 | 121 | 42 | 338 | 296 | 209 |
| July | 2001 | 3 | 3 | 9 | 10 | 12 | 15 | 12 | 36 | 100 | 131 | 56 | 315 | 259 | 210 |
| August | 2001 | 4 | 3 | 8 | 8 | 14 | 17 | 10 | 35 | 100 | 143 | 56 | 304 | 248 | 210 |
| September | 2001 | 4 | 4 | 8 | 8 | 14 | 17 | 11 | 34 | 100 | 140 | 57 | 278 | 221 | 222 |
| October | 2001 | 4 | 4 | 7 | 10 | 12 | 18 | 9 | 36 | 100 | 132 | 46 | 283 | 237 | 219 |
| November | 2001 | 3 | 4 | 5 | 10 | 12 | 18 | 11 | 37 | 100 | 150 | 56 | 323 | 266 | 218 |
| December | 2001 | 3 | 4 | 4 | 12 | 14 | 17 | 11 | 35 | 100 | 155 | 63 | 321 | 257 | 212 |

AGE 55 AND UP

**TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)**

| <u>Date of Survey</u> | | <u>Under</u> | <u>\$10k</u> | <u>\$25k</u> | <u>\$50k</u> | <u>\$100k</u> | <u>\$200k</u> | <u>\$500k</u> | | | <u>Median</u> | <u>Percentiles</u> | | | |
|-----------------------|------|--------------|-----------------|-----------------|-----------------|------------------|------------------|---------------|---------------|--------------|---------------|--------------------|-------------|------------|--------------|
| | | <u>\$10k</u> | <u>to \$24k</u> | <u>to \$49k</u> | <u>to \$99k</u> | <u>to \$199k</u> | <u>to \$499k</u> | <u>and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>1000's</u> | <u>25th</u> | <u>75th</u> | <u>Rng</u> | <u>Cases</u> |
| January | 2002 | 5 | 3 | 7 | 9 | 15 | 13 | 14 | 34 | 100 | 148 | 59 | 363 | 303 | 231 |
| February | 2002 | 5 | 3 | 11 | 8 | 15 | 13 | 14 | 31 | 100 | 131 | 48 | 318 | 270 | 235 |
| March | 2002 | 3 | 3 | 12 | 8 | 16 | 16 | 12 | 30 | 100 | 131 | 44 | 313 | 268 | 239 |
| April | 2002 | 3 | 6 | 7 | 10 | 18 | 18 | 9 | 30 | 100 | 130 | 50 | 259 | 209 | 247 |
| May | 2002 | 2 | 7 | 9 | 12 | 17 | 17 | 7 | 28 | 100 | 115 | 49 | 257 | 208 | 253 |
| June | 2002 | 3 | 8 | 7 | 12 | 14 | 16 | 11 | 29 | 100 | 120 | 47 | 313 | 266 | 248 |
| July | 2002 | 4 | 7 | 9 | 12 | 13 | 16 | 12 | 27 | 100 | 125 | 42 | 323 | 281 | 234 |
| August | 2002 | 8 | 8 | 6 | 11 | 14 | 16 | 13 | 25 | 100 | 130 | 37 | 326 | 290 | 224 |
| September | 2002 | 8 | 7 | 8 | 11 | 16 | 19 | 9 | 22 | 100 | 113 | 37 | 273 | 236 | 238 |
| October | 2002 | 6 | 6 | 9 | 13 | 14 | 20 | 9 | 23 | 100 | 104 | 45 | 274 | 229 | 244 |
| November | 2002 | 4 | 8 | 8 | 13 | 14 | 18 | 10 | 25 | 100 | 105 | 46 | 281 | 235 | 252 |
| December | 2002 | 5 | 10 | 8 | 11 | 12 | 12 | 11 | 30 | 100 | 93 | 36 | 256 | 220 | 251 |
| January | 2003 | 6 | 11 | 8 | 9 | 13 | 15 | 11 | 27 | 100 | 106 | 30 | 263 | 234 | 241 |
| February | 2003 | 7 | 7 | 9 | 9 | 12 | 15 | 11 | 30 | 100 | 103 | 34 | 271 | 237 | 233 |
| March | 2003 | 6 | 5 | 9 | 8 | 13 | 20 | 12 | 27 | 100 | 126 | 41 | 325 | 285 | 240 |
| April | 2003 | 7 | 8 | 10 | 9 | 13 | 15 | 13 | 26 | 100 | 100 | 33 | 283 | 250 | 256 |
| August | 2003 | 8 | 9 | 9 | 11 | 14 | 14 | 11 | 24 | 100 | 89 | 33 | 251 | 218 | 283 |
| September | 2003 | 9 | 7 | 9 | 10 | 15 | 15 | 13 | 22 | 100 | 106 | 34 | 310 | 276 | 282 |
| October | 2003 | 10 | 9 | 9 | 9 | 15 | 14 | 10 | 24 | 100 | 95 | 23 | 277 | 254 | 279 |
| November | 2003 | 7 | 9 | 8 | 10 | 15 | 17 | 13 | 21 | 100 | 126 | 31 | 332 | 302 | 297 |
| December | 2003 | 6 | 9 | 9 | 13 | 14 | 14 | 13 | 22 | 100 | 116 | 34 | 293 | 259 | 303 |
| January | 2004 | 5 | 11 | 10 | 12 | 11 | 15 | 16 | 21 | 100 | 115 | 35 | 326 | 292 | 315 |
| February | 2004 | 6 | 11 | 10 | 13 | 11 | 13 | 12 | 23 | 100 | 89 | 28 | 270 | 241 | 314 |
| March | 2004 | 7 | 11 | 7 | 12 | 10 | 17 | 12 | 23 | 100 | 97 | 25 | 283 | 258 | 314 |
| April | 2004 | 8 | 9 | 8 | 12 | 15 | 15 | 10 | 22 | 100 | 99 | 30 | 250 | 219 | 324 |
| May | 2004 | 7 | 6 | 7 | 11 | 16 | 17 | 14 | 21 | 100 | 125 | 46 | 292 | 246 | 324 |
| June | 2004 | 4 | 5 | 9 | 10 | 19 | 16 | 14 | 23 | 100 | 129 | 52 | 298 | 246 | 337 |
| July | 2004 | 5 | 6 | 9 | 10 | 17 | 16 | 12 | 25 | 100 | 125 | 46 | 283 | 237 | 350 |
| August | 2004 | 7 | 7 | 10 | 12 | 15 | 14 | 10 | 24 | 100 | 99 | 33 | 254 | 222 | 361 |
| September | 2004 | 9 | 8 | 9 | 12 | 12 | 16 | 10 | 25 | 100 | 107 | 27 | 263 | 236 | 356 |
| October | 2004 | 7 | 7 | 8 | 14 | 13 | 15 | 11 | 24 | 100 | 112 | 35 | 269 | 234 | 357 |
| November | 2004 | 6 | 5 | 9 | 11 | 13 | 19 | 10 | 26 | 100 | 132 | 38 | 285 | 247 | 344 |
| December | 2004 | 6 | 5 | 9 | 12 | 15 | 18 | 10 | 24 | 100 | 129 | 42 | 253 | 210 | 357 |
| January | 2005 | 6 | 7 | 10 | 10 | 14 | 17 | 10 | 25 | 100 | 122 | 34 | 248 | 214 | 359 |
| February | 2005 | 7 | 8 | 9 | 12 | 13 | 14 | 11 | 26 | 100 | 101 | 31 | 235 | 204 | 368 |
| March | 2005 | 7 | 9 | 8 | 13 | 11 | 15 | 9 | 28 | 100 | 87 | 30 | 246 | 216 | 377 |
| April | 2005 | 6 | 7 | 9 | 14 | 11 | 17 | 9 | 27 | 100 | 95 | 36 | 265 | 230 | 362 |
| May | 2005 | 4 | 9 | 12 | 12 | 14 | 18 | 8 | 25 | 100 | 99 | 35 | 247 | 212 | 355 |
| June | 2005 | 4 | 8 | 13 | 11 | 16 | 17 | 9 | 21 | 100 | 102 | 36 | 253 | 218 | 335 |
| July | 2005 | 6 | 7 | 13 | 11 | 17 | 15 | 9 | 21 | 100 | 99 | 33 | 238 | 205 | 343 |
| August | 2005 | 8 | 5 | 12 | 11 | 16 | 17 | 11 | 21 | 100 | 109 | 36 | 269 | 233 | 360 |
| September | 2005 | 8 | 7 | 11 | 11 | 13 | 17 | 10 | 23 | 100 | 99 | 31 | 255 | 224 | 398 |
| October | 2005 | 8 | 8 | 11 | 12 | 11 | 19 | 11 | 20 | 100 | 96 | 32 | 269 | 237 | 398 |
| November | 2005 | 9 | 7 | 12 | 13 | 13 | 17 | 9 | 21 | 100 | 89 | 30 | 244 | 213 | 393 |
| December | 2005 | 8 | 7 | 11 | 12 | 16 | 16 | 11 | 19 | 100 | 99 | 34 | 255 | 221 | 371 |
| January | 2006 | 7 | 7 | 9 | 11 | 16 | 16 | 11 | 24 | 100 | 110 | 36 | 265 | 229 | 376 |
| February | 2006 | 6 | 8 | 9 | 11 | 12 | 18 | 12 | 24 | 100 | 106 | 36 | 306 | 271 | 363 |
| March | 2006 | 7 | 7 | 8 | 12 | 10 | 18 | 11 | 26 | 100 | 109 | 36 | 293 | 258 | 353 |
| April | 2006 | 8 | 8 | 8 | 11 | 12 | 18 | 11 | 24 | 100 | 105 | 31 | 295 | 263 | 352 |

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**TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)**

| <u>Date of Survey</u> | | <u>Under</u> | <u>\$10k</u> | <u>\$25k</u> | <u>\$50k</u> | <u>\$100k</u> | <u>\$200k</u> | <u>\$500k</u> | | | <u>Median</u> | <u>Percentiles</u> | | | <u>Cases</u> |
|-----------------------|------|--------------|-----------------|-----------------|-----------------|------------------|------------------|---------------|---------------|--------------|---------------|--------------------|-------------|------------|--------------|
| | | <u>\$10k</u> | <u>to \$24k</u> | <u>to \$49k</u> | <u>to \$99k</u> | <u>to \$199k</u> | <u>to \$499k</u> | <u>and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>1000's</u> | <u>25th</u> | <u>75th</u> | <u>Rng</u> | |
| May | 2006 | 8 | 8 | 7 | 13 | 14 | 15 | 12 | 24 | 100 | 107 | 34 | 271 | 238 | 378 |
| June | 2006 | 10 | 7 | 7 | 12 | 15 | 15 | 12 | 22 | 100 | 104 | 34 | 280 | 246 | 384 |
| July | 2006 | 8 | 6 | 6 | 16 | 13 | 13 | 13 | 25 | 100 | 103 | 42 | 298 | 256 | 386 |
| August | 2006 | 7 | 7 | 7 | 15 | 13 | 14 | 12 | 25 | 100 | 102 | 39 | 290 | 251 | 376 |
| September | 2006 | 6 | 7 | 6 | 15 | 12 | 14 | 13 | 27 | 100 | 106 | 40 | 304 | 264 | 398 |
| October | 2006 | 10 | 7 | 7 | 11 | 14 | 15 | 13 | 23 | 100 | 112 | 30 | 287 | 257 | 420 |
| November | 2006 | 8 | 6 | 8 | 10 | 15 | 16 | 14 | 23 | 100 | 122 | 35 | 306 | 271 | 421 |
| December | 2006 | 8 | 5 | 10 | 9 | 14 | 18 | 13 | 23 | 100 | 128 | 34 | 300 | 267 | 413 |
| January | 2007 | 4 | 6 | 10 | 11 | 14 | 17 | 14 | 24 | 100 | 133 | 46 | 332 | 286 | 398 |
| February | 2007 | 5 | 8 | 10 | 13 | 12 | 15 | 14 | 24 | 100 | 116 | 41 | 313 | 272 | 419 |
| March | 2007 | 4 | 8 | 9 | 15 | 13 | 14 | 16 | 21 | 100 | 119 | 46 | 345 | 299 | 430 |
| April | 2007 | 5 | 7 | 11 | 13 | 14 | 14 | 15 | 21 | 100 | 116 | 42 | 321 | 280 | 439 |
| May | 2007 | 7 | 4 | 10 | 11 | 16 | 19 | 16 | 18 | 100 | 141 | 47 | 342 | 297 | 434 |
| June | 2007 | 7 | 5 | 9 | 11 | 16 | 18 | 16 | 18 | 100 | 138 | 47 | 326 | 279 | 429 |
| July | 2007 | 6 | 6 | 8 | 11 | 14 | 18 | 16 | 20 | 100 | 134 | 46 | 361 | 315 | 429 |
| August | 2007 | 4 | 8 | 10 | 9 | 13 | 15 | 15 | 25 | 100 | 117 | 41 | 357 | 316 | 429 |
| September | 2007 | 4 | 8 | 12 | 9 | 13 | 16 | 14 | 24 | 100 | 105 | 37 | 354 | 318 | 435 |
| October | 2007 | 6 | 8 | 12 | 10 | 13 | 17 | 13 | 21 | 100 | 99 | 32 | 299 | 268 | 435 |
| November | 2007 | 8 | 6 | 10 | 11 | 16 | 15 | 14 | 20 | 100 | 103 | 36 | 322 | 286 | 443 |
| December | 2007 | 9 | 5 | 8 | 10 | 17 | 15 | 14 | 21 | 100 | 118 | 46 | 332 | 286 | 443 |
| January | 2008 | 7 | 4 | 6 | 10 | 18 | 14 | 15 | 27 | 100 | 133 | 53 | 387 | 334 | 440 |
| February | 2008 | 5 | 5 | 9 | 10 | 15 | 15 | 15 | 26 | 100 | 128 | 52 | 374 | 322 | 427 |
| March | 2008 | 6 | 7 | 10 | 10 | 13 | 15 | 14 | 25 | 100 | 112 | 40 | 360 | 320 | 419 |
| April | 2008 | 6 | 8 | 12 | 10 | 13 | 17 | 12 | 22 | 100 | 99 | 36 | 308 | 271 | 420 |
| May | 2008 | 7 | 8 | 9 | 10 | 15 | 17 | 13 | 22 | 100 | 108 | 37 | 326 | 289 | 437 |
| June | 2008 | 6 | 8 | 9 | 10 | 15 | 16 | 14 | 23 | 100 | 111 | 39 | 319 | 280 | 434 |
| July | 2008 | 6 | 7 | 8 | 10 | 16 | 15 | 14 | 24 | 100 | 126 | 42 | 327 | 285 | 438 |
| August | 2008 | 5 | 7 | 7 | 11 | 14 | 17 | 14 | 25 | 100 | 136 | 45 | 323 | 278 | 438 |
| September | 2008 | 5 | 5 | 8 | 13 | 14 | 16 | 16 | 24 | 100 | 142 | 49 | 387 | 338 | 444 |
| October | 2008 | 5 | 5 | 8 | 13 | 14 | 15 | 16 | 23 | 100 | 130 | 48 | 365 | 317 | 442 |
| November | 2008 | 5 | 6 | 9 | 12 | 17 | 13 | 15 | 22 | 100 | 116 | 46 | 344 | 298 | 439 |
| December | 2008 | 5 | 8 | 8 | 13 | 18 | 12 | 14 | 23 | 100 | 109 | 42 | 284 | 242 | 442 |
| January | 2009 | 5 | 7 | 8 | 14 | 15 | 14 | 11 | 25 | 100 | 99 | 40 | 276 | 236 | 445 |
| February | 2009 | 6 | 8 | 8 | 14 | 13 | 16 | 11 | 23 | 100 | 98 | 37 | 273 | 237 | 441 |
| March | 2009 | 7 | 8 | 9 | 13 | 14 | 18 | 9 | 23 | 100 | 97 | 36 | 261 | 225 | 461 |
| April | 2009 | 6 | 9 | 9 | 13 | 14 | 18 | 11 | 19 | 100 | 96 | 37 | 285 | 248 | 472 |
| May | 2009 | 7 | 8 | 10 | 14 | 14 | 15 | 12 | 19 | 100 | 93 | 36 | 272 | 236 | 482 |
| June | 2009 | 5 | 8 | 12 | 14 | 12 | 15 | 14 | 20 | 100 | 102 | 36 | 323 | 287 | 485 |
| July | 2009 | 5 | 8 | 12 | 10 | 13 | 16 | 13 | 22 | 100 | 111 | 34 | 330 | 296 | 459 |
| August | 2009 | 3 | 8 | 13 | 9 | 12 | 16 | 15 | 23 | 100 | 122 | 37 | 379 | 343 | 463 |
| September | 2009 | 5 | 8 | 11 | 9 | 13 | 18 | 13 | 23 | 100 | 117 | 37 | 348 | 311 | 458 |
| October | 2009 | 6 | 7 | 9 | 12 | 12 | 15 | 16 | 23 | 100 | 113 | 39 | 363 | 324 | 509 |
| November | 2009 | 7 | 8 | 9 | 11 | 12 | 15 | 15 | 23 | 100 | 103 | 34 | 352 | 317 | 508 |
| December | 2009 | 7 | 8 | 9 | 12 | 11 | 15 | 15 | 22 | 100 | 109 | 34 | 333 | 299 | 519 |
| January | 2010 | 6 | 9 | 9 | 11 | 12 | 17 | 13 | 22 | 100 | 108 | 33 | 313 | 280 | 492 |
| February | 2010 | 5 | 9 | 9 | 11 | 13 | 18 | 13 | 21 | 100 | 109 | 37 | 286 | 249 | 494 |
| March | 2010 | 5 | 8 | 8 | 13 | 13 | 18 | 13 | 21 | 100 | 114 | 44 | 292 | 248 | 486 |
| April | 2010 | 4 | 6 | 8 | 13 | 13 | 18 | 16 | 22 | 100 | 138 | 49 | 363 | 314 | 503 |
| May | 2010 | 5 | 6 | 9 | 15 | 13 | 17 | 14 | 21 | 100 | 131 | 48 | 339 | 292 | 507 |
| June | 2010 | 3 | 8 | 10 | 13 | 14 | 17 | 15 | 21 | 100 | 129 | 43 | 352 | 309 | 506 |

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TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)

| Date of Survey | | Under | \$10k | \$25k | \$50k | \$100k | \$200k | \$500k | DK, NA | Total | Median 1000's | Percentiles | | | Cases |
|----------------|------|-------|----------|----------|----------|-----------|-----------|--------|--------|-------|------------------|-------------|------|-----|-------|
| | | \$10k | to \$24k | to \$49k | to \$99k | to \$199k | to \$499k | and up | | | | 25th | 75th | Rng | |
| July | 2010 | 5 | 8 | 10 | 12 | 15 | 17 | 13 | 19 | 100 | 109 | 39 | 291 | 252 | 506 |
| August | 2010 | 5 | 8 | 10 | 10 | 15 | 19 | 15 | 18 | 100 | 128 | 42 | 347 | 305 | 501 |
| September | 2010 | 7 | 8 | 7 | 12 | 14 | 18 | 16 | 19 | 100 | 121 | 44 | 333 | 289 | 509 |
| October | 2010 | 7 | 6 | 6 | 14 | 13 | 18 | 17 | 19 | 100 | 135 | 48 | 367 | 319 | 510 |
| November | 2010 | 7 | 7 | 6 | 14 | 13 | 17 | 15 | 21 | 100 | 121 | 46 | 327 | 281 | 524 |
| December | 2010 | 7 | 6 | 8 | 13 | 14 | 18 | 15 | 20 | 100 | 134 | 43 | 330 | 287 | 521 |
| January | 2011 | 7 | 7 | 9 | 11 | 14 | 18 | 14 | 20 | 100 | 126 | 40 | 316 | 276 | 538 |
| February | 2011 | 6 | 6 | 7 | 12 | 14 | 17 | 16 | 22 | 100 | 134 | 47 | 379 | 331 | 525 |
| March | 2011 | 6 | 6 | 8 | 11 | 15 | 17 | 15 | 22 | 100 | 121 | 47 | 379 | 332 | 529 |
| April | 2011 | 5 | 6 | 9 | 12 | 15 | 16 | 15 | 22 | 100 | 122 | 46 | 358 | 312 | 522 |
| May | 2011 | 5 | 7 | 11 | 10 | 14 | 17 | 13 | 22 | 100 | 122 | 39 | 307 | 268 | 533 |
| June | 2011 | 5 | 7 | 11 | 11 | 12 | 19 | 14 | 22 | 100 | 138 | 39 | 327 | 288 | 532 |
| July | 2011 | 5 | 6 | 11 | 11 | 12 | 19 | 14 | 21 | 100 | 141 | 39 | 359 | 319 | 521 |
| August | 2011 | 5 | 7 | 10 | 13 | 13 | 19 | 15 | 18 | 100 | 134 | 40 | 358 | 318 | 528 |
| September | 2011 | 4 | 7 | 10 | 13 | 14 | 16 | 15 | 20 | 100 | 129 | 43 | 341 | 298 | 530 |
| October | 2011 | 5 | 7 | 10 | 12 | 15 | 15 | 15 | 20 | 100 | 118 | 39 | 298 | 259 | 531 |
| November | 2011 | 6 | 7 | 8 | 12 | 15 | 15 | 15 | 23 | 100 | 129 | 43 | 298 | 256 | 534 |
| December | 2011 | 6 | 6 | 7 | 13 | 12 | 18 | 16 | 22 | 100 | 148 | 45 | 306 | 261 | 529 |
| January | 2012 | 5 | 5 | 7 | 14 | 11 | 20 | 15 | 24 | 100 | 162 | 48 | 313 | 265 | 548 |
| February | 2012 | 5 | 5 | 8 | 14 | 11 | 19 | 15 | 22 | 100 | 163 | 49 | 317 | 267 | 533 |
| March | 2012 | 6 | 5 | 8 | 13 | 14 | 19 | 13 | 22 | 100 | 146 | 46 | 301 | 255 | 534 |
| April | 2012 | 5 | 6 | 8 | 14 | 14 | 18 | 14 | 21 | 100 | 133 | 48 | 322 | 275 | 513 |
| May | 2012 | 5 | 7 | 10 | 13 | 14 | 18 | 14 | 19 | 100 | 126 | 42 | 324 | 282 | 521 |
| June | 2012 | 4 | 7 | 8 | 13 | 14 | 18 | 16 | 18 | 100 | 133 | 46 | 358 | 312 | 526 |
| July | 2012 | 4 | 5 | 7 | 12 | 16 | 20 | 17 | 19 | 100 | 154 | 57 | 371 | 313 | 549 |
| August | 2012 | 4 | 5 | 4 | 14 | 16 | 19 | 19 | 20 | 100 | 159 | 66 | 429 | 363 | 550 |
| September | 2012 | 4 | 5 | 3 | 14 | 14 | 19 | 20 | 20 | 100 | 170 | 70 | 454 | 384 | 563 |
| October | 2012 | 4 | 7 | 4 | 15 | 14 | 18 | 20 | 19 | 100 | 166 | 65 | 457 | 392 | 542 |
| November | 2012 | 4 | 6 | 5 | 15 | 13 | 19 | 19 | 19 | 100 | 170 | 65 | 425 | 361 | 530 |
| December | 2012 | 3 | 6 | 7 | 14 | 14 | 18 | 17 | 20 | 100 | 155 | 61 | 385 | 323 | 530 |
| January | 2013 | 4 | 6 | 7 | 12 | 15 | 18 | 18 | 20 | 100 | 154 | 58 | 403 | 345 | 537 |
| February | 2013 | 4 | 5 | 8 | 10 | 15 | 17 | 21 | 20 | 100 | 167 | 61 | 441 | 380 | 530 |
| March | 2013 | 4 | 5 | 7 | 11 | 13 | 17 | 23 | 20 | 100 | 181 | 61 | 493 | 432 | 491 |
| April | 2013 | 4 | 5 | 7 | 13 | 12 | 17 | 21 | 22 | 100 | 181 | 61 | 448 | 388 | 483 |
| May | 2013 | 4 | 7 | 5 | 11 | 12 | 19 | 19 | 22 | 100 | 182 | 54 | 450 | 397 | 489 |
| June | 2013 | 5 | 7 | 6 | 10 | 15 | 17 | 18 | 22 | 100 | 156 | 48 | 403 | 355 | 510 |
| July | 2013 | 5 | 7 | 7 | 10 | 16 | 17 | 19 | 21 | 100 | 156 | 48 | 423 | 375 | 514 |
| August | 2013 | 6 | 5 | 6 | 12 | 16 | 17 | 20 | 18 | 100 | 158 | 55 | 420 | 365 | 511 |
| September | 2013 | 5 | 5 | 5 | 13 | 13 | 20 | 21 | 18 | 100 | 180 | 62 | 460 | 398 | 514 |
| October | 2013 | 4 | 5 | 5 | 12 | 13 | 20 | 22 | 19 | 100 | 191 | 66 | 497 | 430 | 531 |
| November | 2013 | 3 | 5 | 8 | 11 | 13 | 19 | 19 | 22 | 100 | 184 | 64 | 468 | 404 | 548 |
| December | 2013 | 3 | 5 | 7 | 9 | 14 | 18 | 18 | 26 | 100 | 176 | 60 | 459 | 399 | 569 |
| January | 2014 | 3 | 5 | 7 | 8 | 15 | 18 | 18 | 25 | 100 | 165 | 56 | 431 | 375 | 580 |
| February | 2014 | 5 | 5 | 7 | 9 | 14 | 18 | 19 | 23 | 100 | 168 | 51 | 455 | 404 | 595 |
| March | 2014 | 4 | 5 | 7 | 12 | 14 | 19 | 19 | 21 | 100 | 166 | 53 | 423 | 370 | 598 |
| April | 2014 | 3 | 4 | 6 | 12 | 13 | 20 | 20 | 21 | 100 | 183 | 65 | 454 | 389 | 577 |
| May | 2014 | 2 | 6 | 6 | 11 | 14 | 21 | 18 | 22 | 100 | 178 | 65 | 416 | 351 | 588 |
| June | 2014 | 3 | 5 | 7 | 10 | 13 | 21 | 20 | 21 | 100 | 193 | 69 | 458 | 388 | 592 |
| July | 2014 | 4 | 6 | 6 | 10 | 12 | 21 | 20 | 21 | 100 | 189 | 61 | 456 | 394 | 624 |
| August | 2014 | 6 | 6 | 6 | 9 | 13 | 21 | 21 | 19 | 100 | 181 | 58 | 474 | 415 | 604 |

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TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)

| Date of Survey | | 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 | |
| September | 2014 | 6 | 6 | 5 | 9 | 13 | 21 | 21 | 19 | 100 | 182 | 57 | 474 | 417 | 579 |
| October | 2014 | 6 | 5 | 6 | 9 | 14 | 22 | 21 | 17 | 100 | 186 | 61 | 476 | 415 | 529 |
| November | 2014 | 4 | 3 | 6 | 10 | 13 | 22 | 22 | 20 | 100 | 212 | 72 | 510 | 438 | 517 |
| December | 2014 | 4 | 3 | 6 | 10 | 13 | 21 | 22 | 20 | 100 | 209 | 74 | 509 | 435 | 534 |
| January | 2015 | 4 | 3 | 6 | 10 | 12 | 21 | 23 | 20 | 100 | 210 | 73 | 511 | 437 | 534 |
| February | 2015 | 4 | 4 | 5 | 9 | 13 | 20 | 25 | 20 | 100 | 214 | 73 | 505 | 432 | 532 |
| March | 2015 | 4 | 5 | 4 | 9 | 13 | 20 | 26 | 19 | 100 | 232 | 80 | 533 | 453 | 491 |
| April | 2015 | 3 | 6 | 4 | 7 | 13 | 23 | 25 | 19 | 100 | 244 | 90 | 529 | 439 | 476 |
| May | 2015 | 2 | 5 | 4 | 10 | 14 | 24 | 22 | 19 | 100 | 216 | 91 | 506 | 415 | 437 |
| June | 2015 | 2 | 4 | 4 | 11 | 14 | 24 | 22 | 19 | 100 | 212 | 91 | 487 | 395 | 444 |
| July | 2015 | 3 | 3 | 5 | 14 | 15 | 19 | 23 | 19 | 100 | 197 | 77 | 488 | 411 | 450 |
| August | 2015 | 3 | 2 | 5 | 12 | 15 | 20 | 25 | 17 | 100 | 210 | 78 | 502 | 424 | 500 |
| September | 2015 | 3 | 2 | 7 | 14 | 13 | 20 | 24 | 16 | 100 | 196 | 71 | 496 | 425 | 485 |
| October | 2015 | 5 | 2 | 6 | 11 | 12 | 24 | 23 | 17 | 100 | 216 | 87 | 502 | 415 | 484 |
| November | 2015 | 4 | 3 | 7 | 9 | 12 | 24 | 22 | 18 | 100 | 214 | 87 | 504 | 418 | 451 |
| December | 2015 | 5 | 4 | 7 | 6 | 12 | 23 | 23 | 20 | 100 | 233 | 86 | 556 | 470 | 439 |
| January | 2016 | 4 | 4 | 9 | 9 | 12 | 21 | 23 | 18 | 100 | 231 | 71 | 549 | 478 | 437 |
| February | 2016 | 5 | 4 | 8 | 10 | 11 | 22 | 22 | 18 | 100 | 231 | 63 | 523 | 460 | 425 |
| March | 2016 | 5 | 4 | 8 | 11 | 10 | 24 | 22 | 17 | 100 | 218 | 65 | 500 | 435 | 442 |
| April | 2016 | 5 | 4 | 5 | 10 | 13 | 24 | 21 | 17 | 100 | 204 | 70 | 473 | 403 | 463 |
| May | 2016 | 5 | 3 | 6 | 9 | 12 | 24 | 24 | 17 | 100 | 228 | 79 | 501 | 422 | 516 |
| June | 2016 | 5 | 3 | 6 | 8 | 13 | 22 | 25 | 18 | 100 | 225 | 80 | 521 | 441 | 524 |
| July | 2016 | 5 | 4 | 8 | 8 | 12 | 20 | 27 | 17 | 100 | 210 | 71 | 569 | 497 | 516 |
| August | 2016 | 4 | 4 | 7 | 11 | 16 | 18 | 25 | 15 | 100 | 171 | 68 | 533 | 465 | 484 |
| September | 2016 | 4 | 5 | 8 | 10 | 17 | 19 | 24 | 13 | 100 | 171 | 56 | 493 | 437 | 490 |
| October | 2016 | 4 | 4 | 7 | 10 | 17 | 20 | 25 | 14 | 100 | 202 | 68 | 521 | 453 | 502 |
| November | 2016 | 5 | 4 | 8 | 8 | 14 | 21 | 26 | 15 | 100 | 222 | 63 | 548 | 486 | 508 |
| December | 2016 | 3 | 4 | 6 | 11 | 14 | 19 | 26 | 16 | 100 | 222 | 75 | 581 | 506 | 522 |
| January | 2017 | 2 | 4 | 6 | 11 | 15 | 18 | 26 | 16 | 100 | 210 | 73 | 583 | 510 | 528 |
| February | 2017 | 4 | 6 | 4 | 12 | 15 | 17 | 27 | 14 | 100 | 189 | 70 | 590 | 520 | 547 |
| March | 2017 | 4 | 6 | 7 | 11 | 14 | 18 | 25 | 15 | 100 | 189 | 63 | 544 | 481 | 543 |
| April | 2017 | 4 | 6 | 7 | 10 | 13 | 18 | 26 | 16 | 100 | 209 | 66 | 534 | 469 | 552 |
| May | 2017 | 3 | 5 | 8 | 10 | 12 | 16 | 28 | 18 | 100 | 224 | 68 | 591 | 522 | 557 |
| June | 2017 | 4 | 6 | 6 | 9 | 12 | 14 | 30 | 20 | 100 | 239 | 69 | 674 | 604 | 550 |
| July | 2017 | 4 | 4 | 5 | 11 | 11 | 15 | 29 | 20 | 100 | 239 | 68 | 669 | 601 | 543 |
| August | 2017 | 4 | 3 | 5 | 8 | 12 | 17 | 28 | 21 | 100 | 247 | 79 | 620 | 541 | 540 |
| September | 2017 | 3 | 3 | 5 | 11 | 12 | 20 | 25 | 21 | 100 | 229 | 83 | 522 | 439 | 553 |
| October | 2017 | 3 | 3 | 6 | 9 | 12 | 20 | 25 | 21 | 100 | 231 | 84 | 554 | 471 | 572 |
| November | 2017 | 3 | 4 | 6 | 11 | 12 | 19 | 27 | 18 | 100 | 238 | 78 | 626 | 549 | 591 |
| December | 2017 | 4 | 6 | 6 | 8 | 12 | 18 | 30 | 16 | 100 | 245 | 80 | 738 | 658 | 602 |
| January | 2018 | 5 | 6 | 5 | 8 | 11 | 19 | 29 | 17 | 100 | 229 | 76 | 751 | 674 | 595 |
| February | 2018 | 4 | 6 | 5 | 8 | 10 | 19 | 28 | 20 | 100 | 245 | 76 | 739 | 663 | 590 |
| March | 2018 | 4 | 5 | 5 | 8 | 11 | 20 | 25 | 21 | 100 | 241 | 74 | 648 | 574 | 605 |
| April | 2018 | 3 | 7 | 5 | 9 | 12 | 19 | 25 | 20 | 100 | 232 | 68 | 632 | 564 | 616 |
| May | 2018 | 4 | 6 | 6 | 9 | 12 | 21 | 25 | 17 | 100 | 216 | 65 | 596 | 531 | 619 |
| June | 2018 | 4 | 6 | 6 | 10 | 13 | 19 | 27 | 15 | 100 | 213 | 68 | 626 | 559 | 604 |
| July | 2018 | 4 | 4 | 7 | 10 | 12 | 19 | 28 | 16 | 100 | 231 | 72 | 589 | 517 | 588 |
| August | 2018 | 4 | 3 | 6 | 9 | 14 | 17 | 30 | 18 | 100 | 249 | 83 | 653 | 570 | 581 |
| September | 2018 | 3 | 2 | 5 | 9 | 13 | 18 | 30 | 20 | 100 | 274 | 88 | 687 | 599 | 601 |
| October | 2018 | 3 | 4 | 4 | 9 | 14 | 17 | 31 | 18 | 100 | 259 | 85 | 736 | 651 | 617 |

AGE 55 AND UP

**TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)**

| <u>Date of Survey</u> | | <u>Under \$10k</u> | <u>\$10k to \$24k</u> | <u>\$25k to \$49k</u> | <u>\$50k to \$99k</u> | <u>\$100k to \$199k</u> | <u>\$200k to \$499k</u> | <u>\$500k and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>Median 1000's</u> | <u>Percentiles</u> | | | <u>Cases</u> |
|-----------------------|--|--------------------|-----------------------|-----------------------|-----------------------|-------------------------|-------------------------|----------------------|---------------|--------------|----------------------|--------------------|-------------|------------|--------------|
| | | | | | | | | | | | | <u>25th</u> | <u>75th</u> | <u>Rng</u> | |
| November 2018 | | 4 | 5 | 5 | 9 | 14 | 18 | 30 | 16 | 100 | 229 | 77 | 709 | 631 | 637 |
| December 2018 | | 6 | 6 | 5 | 9 | 12 | 17 | 28 | 16 | 100 | 207 | 65 | 666 | 601 | 617 |
| January 2019 | | 5 | 5 | 5 | 9 | 11 | 19 | 27 | 18 | 100 | 233 | 75 | 620 | 545 | 613 |
| February 2019 | | 4 | 5 | 4 | 10 | 10 | 20 | 27 | 20 | 100 | 244 | 78 | 619 | 541 | 601 |
| March 2019 | | 3 | 4 | 3 | 8 | 11 | 21 | 29 | 20 | 100 | 288 | 93 | 685 | 592 | 594 |
| April 2019 | | 3 | 5 | 3 | 8 | 11 | 20 | 31 | 18 | 100 | 295 | 96 | 769 | 673 | 576 |
| May 2019 | | 4 | 4 | 4 | 8 | 12 | 21 | 32 | 15 | 100 | 285 | 93 | 850 | 757 | 564 |
| June 2019 | | 3 | 5 | 4 | 7 | 12 | 20 | 32 | 17 | 100 | 286 | 98 | 857 | 759 | 583 |
| July 2019 | | 3 | 5 | 3 | 8 | 13 | 20 | 30 | 17 | 100 | 280 | 92 | 842 | 750 | 589 |
| August 2019 | | 3 | 4 | 2 | 7 | 12 | 20 | 32 | 20 | 100 | 316 | 114 | 826 | 712 | 591 |
| September 2019 | | 3 | 3 | 3 | 9 | 11 | 19 | 33 | 19 | 100 | 311 | 112 | 838 | 726 | 593 |
| October 2019 | | 4 | 2 | 3 | 8 | 13 | 17 | 33 | 19 | 100 | 278 | 112 | 815 | 703 | 610 |
| November 2019 | | 4 | 4 | 5 | 8 | 12 | 18 | 32 | 18 | 100 | 260 | 94 | 817 | 724 | 662 |
| December 2019 | | 5 | 5 | 5 | 6 | 12 | 19 | 31 | 17 | 100 | 260 | 87 | 788 | 701 | 684 |
| January 2020 | | 3 | 4 | 5 | 6 | 11 | 21 | 33 | 15 | 100 | 295 | 95 | 790 | 695 | 699 |
| February 2020 | | 4 | 3 | 4 | 8 | 12 | 21 | 34 | 14 | 100 | 305 | 99 | 764 | 664 | 677 |
| March 2020 | | 3 | 2 | 4 | 8 | 11 | 22 | 33 | 16 | 100 | 303 | 115 | 759 | 643 | 693 |
| April 2020 | | 4 | 3 | 4 | 9 | 9 | 21 | 32 | 18 | 100 | 299 | 107 | 787 | 679 | 684 |
| May 2020 | | 4 | 4 | 5 | 8 | 9 | 20 | 28 | 21 | 100 | 284 | 93 | 699 | 606 | 678 |
| June 2020 | | 4 | 4 | 6 | 9 | 10 | 19 | 29 | 19 | 100 | 265 | 72 | 694 | 622 | 650 |
| July 2020 | | 5 | 4 | 5 | 9 | 13 | 19 | 28 | 18 | 100 | 250 | 74 | 614 | 540 | 648 |
| August 2020 | | 4 | 5 | 4 | 9 | 12 | 18 | 31 | 16 | 100 | 254 | 78 | 655 | 576 | 642 |
| September 2020 | | 4 | 4 | 4 | 9 | 12 | 18 | 31 | 18 | 100 | 268 | 83 | 665 | 582 | 639 |
| October 2020 | | 3 | 5 | 5 | 8 | 11 | 18 | 33 | 18 | 100 | 283 | 87 | 766 | 679 | 647 |
| November 2020 | | 3 | 3 | 4 | 9 | 11 | 18 | 33 | 19 | 100 | 299 | 93 | 858 | 765 | 641 |
| December 2020 | | 4 | 3 | 3 | 10 | 11 | 18 | 34 | 17 | 100 | 303 | 92 | 933 | 840 | 632 |
| January 2021 | | 4 | 3 | 3 | 9 | 12 | 17 | 34 | 18 | 100 | 300 | 94 | 844 | 749 | 597 |
| February 2021 | | 3 | 3 | 4 | 8 | 13 | 17 | 33 | 18 | 100 | 298 | 92 | 798 | 705 | 588 |
| March 2021 | | 4 | 3 | 4 | 8 | 13 | 16 | 32 | 20 | 100 | 280 | 82 | 728 | 646 | 581 |
| April 2021 | | 4 | 3 | 5 | 9 | 9 | 16 | 34 | 19 | 100 | 321 | 81 | 853 | 773 | 596 |
| May 2021 | | 4 | 3 | 5 | 7 | 8 | 17 | 36 | 19 | 100 | 360 | 91 | 902 | 811 | 590 |
| June 2021 | | 3 | 4 | 5 | 6 | 8 | 17 | 38 | 18 | 100 | 386 | 98 | 977 | 879 | 598 |
| July 2021 | | 3 | 4 | 4 | 4 | 10 | 19 | 34 | 21 | 100 | 348 | 110 | 881 | 771 | 569 |
| August 2021 | | 2 | 4 | 4 | 6 | 11 | 18 | 30 | 25 | 100 | 305 | 105 | 889 | 784 | 563 |
| September 2021 | | 4 | 3 | 3 | 7 | 11 | 18 | 26 | 27 | 100 | 274 | 98 | 824 | 727 | 555 |
| October 2021 | | 4 | 4 | 3 | 9 | 11 | 16 | 30 | 23 | 100 | 288 | 98 | 919 | 822 | 558 |
| November 2021 | | 4 | 4 | 4 | 9 | 11 | 16 | 33 | 19 | 100 | 300 | 98 | 860 | 762 | 591 |
| December 2021 | | 2 | 4 | 3 | 9 | 11 | 19 | 35 | 18 | 100 | 322 | 112 | 876 | 764 | 614 |
| January 2022 | | 2 | 3 | 4 | 9 | 11 | 17 | 33 | 22 | 100 | 308 | 101 | 799 | 698 | 634 |
| February 2022 | | 2 | 3 | 3 | 8 | 13 | 18 | 30 | 23 | 100 | 285 | 102 | 788 | 686 | 612 |
| March 2022 | | 2 | 4 | 4 | 7 | 14 | 16 | 29 | 24 | 100 | 273 | 99 | 793 | 694 | 609 |
| April 2022 | | 3 | 5 | 3 | 7 | 13 | 16 | 30 | 23 | 100 | 279 | 95 | 837 | 743 | 613 |
| May 2022 | | 3 | 5 | 3 | 6 | 12 | 15 | 34 | 23 | 100 | 350 | 105 | 884 | 779 | 617 |
| June 2022 | | 3 | 4 | 2 | 6 | 12 | 17 | 35 | 21 | 100 | 363 | 108 | 875 | 767 | 621 |
| July 2022 | | 3 | 3 | 4 | 6 | 11 | 17 | 33 | 23 | 100 | 362 | 106 | 838 | 732 | 617 |
| August 2022 | | 2 | 3 | 4 | 7 | 11 | 17 | 30 | 25 | 100 | 310 | 96 | 813 | 716 | 638 |
| September 2022 | | 3 | 5 | 5 | 8 | 10 | 16 | 27 | 26 | 100 | 273 | 77 | 718 | 641 | 609 |
| October 2022 | | 4 | 6 | 5 | 7 | 11 | 17 | 27 | 23 | 100 | 255 | 77 | 694 | 617 | 605 |
| November 2022 | | 6 | 5 | 4 | 9 | 10 | 19 | 26 | 20 | 100 | 233 | 68 | 616 | 548 | 571 |
| December 2022 | | 5 | 4 | 4 | 8 | 12 | 18 | 30 | 20 | 100 | 271 | 86 | 698 | 612 | 602 |

AGE 55 AND UP

**TABLE 21
CURRENT VALUE OF STOCK MARKET INVESTMENTS
(Three Month Moving Averages)**

| <u>Date of Survey</u> | | <u>Under</u> | <u>\$10k</u> | <u>\$25k</u> | <u>\$50k</u> | <u>\$100k</u> | <u>\$200k</u> | <u>\$500k</u> | | | <u>Median</u> | <u>Percentiles</u> | | | |
|-----------------------|------|--------------|-----------------|-----------------|-----------------|------------------|------------------|---------------|---------------|--------------|---------------|--------------------|-------------|------------|--------------|
| | | <u>\$10k</u> | <u>to \$24k</u> | <u>to \$49k</u> | <u>to \$99k</u> | <u>to \$199k</u> | <u>to \$499k</u> | <u>and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>1000's</u> | <u>25th</u> | <u>75th</u> | <u>Rng</u> | <u>Cases</u> |
| January | 2023 | 3 | 3 | 5 | 8 | 13 | 19 | 30 | 19 | 100 | 280 | 101 | 714 | 613 | 616 |
| February | 2023 | 2 | 4 | 5 | 7 | 14 | 19 | 31 | 18 | 100 | 279 | 102 | 727 | 625 | 654 |
| March | 2023 | 3 | 4 | 5 | 7 | 12 | 20 | 30 | 19 | 100 | 277 | 95 | 752 | 657 | 613 |
| April | 2023 | 5 | 4 | 5 | 7 | 11 | 20 | 29 | 19 | 100 | 268 | 86 | 746 | 660 | 605 |
| May | 2023 | 4 | 4 | 4 | 8 | 10 | 20 | 29 | 21 | 100 | 285 | 91 | 736 | 645 | 589 |
| June | 2023 | 4 | 4 | 5 | 7 | 11 | 19 | 30 | 21 | 100 | 274 | 89 | 779 | 690 | 611 |
| July | 2023 | 3 | 3 | 4 | 8 | 9 | 19 | 33 | 21 | 100 | 321 | 90 | 865 | 774 | 630 |
| August | 2023 | 3 | 3 | 5 | 8 | 10 | 19 | 31 | 20 | 100 | 295 | 89 | 830 | 740 | 649 |
| September | 2023 | 3 | 4 | 5 | 8 | 9 | 20 | 30 | 21 | 100 | 296 | 83 | 743 | 660 | 651 |
| October | 2023 | 4 | 5 | 5 | 8 | 11 | 19 | 29 | 19 | 100 | 245 | 77 | 652 | 575 | 647 |
| November | 2023 | 4 | 5 | 5 | 9 | 10 | 18 | 30 | 19 | 100 | 264 | 74 | 683 | 609 | 623 |
| December | 2023 | 4 | 4 | 4 | 8 | 12 | 18 | 33 | 17 | 100 | 287 | 97 | 748 | 651 | 633 |