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 25th	Percentiles 75th	Rng	Cases
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)

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	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

AGE 55 AND UP
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	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

AGE 55 AND UP
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
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

AGE 55 AND UP
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
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)

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
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)

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	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
January	2024	3	4	4	8	11	18	34	18	100	307	98	797	698	641
February	2024	4	4	5	8	10	18	34	17	100	328	99	824	724	650
March	2024	4	4	5	8	9	19	32	18	100	307	94	750	656	651
April	2024	5	4	5	6	11	18	32	18	100	329	95	788	693	724
May	2024	5	4	4	6	11	18	34	18	100	320	103	900	797	887
June	2024	6	3	3	6	10	17	38	16	100	364	104	996	891	1054
July	2024	6	4	3	8	9	18	39	13	100	371	97	1,000	903	1175
August	2024	6	6	4	7	9	17	40	11	100	382	91	991	900	1301
September	2024	5	6	4	8	9	16	39	12	100	381	86	994	909	1326
October	2024	4	6	5	7	10	16	40	12	100	385	93	1,005	912	1319
November	2024	4	5	4	7	10	17	40	13	100	411	104	1,001	898	1185
December	2024	4	4	4	7	9	16	42	15	100	472	133	1,112	979	1162
January	2025	4	4	3	7	9	16	43	14	100	502	136	1,119	983	1236
February	2025	4	3	4	6	10	15	43	14	100	468	131	1,128	998	1302
March	2025	5	4	6	6	10	15	43	11	100	407	101	1,027	926	1578
April	2025	5	4	5	6	10	15	43	12	100	407	117	1,020	903	1603
May	2025	4	4	4	6	9	16	44	12	100	452	122	1,018	896	1685
June	2025	4	4	4	6	9	18	45	11	100	473	137	1,024	886	1528
July	2025	4	4	3	6	10	18	45	10	100	474	136	1,054	917	1621
August	2025	3	4	4	6	10	18	46	9	100	482	134	1,107	973	1586
September	2025	4	4	4	6	11	17	45	9	100	460	118	1,106	988	1667
October	2025	5	5	4	7	10	16	44	10	100	459	109	1,074	964	1627
November	2025	5	4	4	6	10	16	45	9	100	464	123	1,114	991	1689
December	2025	3	5	3	6	9	17	47	9	100	494	149	1,103	954	1581
January	2026	3	5	3	6	9	18	48	10	100	495	150	1,199	1,048	1609
February	2026	4	5	3	6	9	17	48	10	100	493	141	1,100	959	1691
March	2026	5	4	3	6	9	16	48	9	100	503	118	1,162	1,044	1912
April	2026	5	4	4	6	9	16	48	8	100	499	111	1,083	972	1921
May	2026	5	4	4	6	8	15	49	8	100	506	119	1,087	968	1841
June	2026	5	4	4	6	8	16	48	9	100	499	118	1,045	927	1775
July	2026	6	3	5	6	8	16	47	10	100	500	125	1,091	967	1780