

EDUCATION SOME COLLEGE

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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	38	16	15	6	5	3	0	17	100	11	2	38	36	272
April	1990	40	13	12	8	7	3	0	16	100	11	3	50	48	255
September	1997	20	14	11	19	15	5	4	12	100	44	12	101	89	145
February	1998	13	15	19	13	10	4	4	22	100	33	16	91	76	135
November	1998	19	15	11	16	9	8	4	19	100	34	9	92	84	167
December	1998	18	15	13	15	8	10	3	17	100	35	11	96	85	195
January	1999	19	17	13	15	10	9	3	15	100	32	12	96	84	200
February	1999	20	13	15	11	10	10	2	19	100	30	12	115	102	187
March	1999	22	13	14	11	10	9	2	20	100	30	9	110	101	155
April	1999	16	14	14	13	9	9	4	21	100	42	13	113	99	144
May	1999	12	13	14	17	12	8	5	19	100	56	22	120	98	148
June	1999	12	16	12	16	12	9	6	16	100	51	21	122	100	156
July	1999	13	14	10	16	14	10	7	16	100	58	19	140	120	155
August	1999	17	17	10	13	12	8	5	17	100	46	11	117	105	163
September	1999	15	13	10	16	11	11	4	20	100	53	13	140	127	158
October	1999	16	13	11	18	11	11	1	19	100	45	14	122	108	163
November	1999	17	12	9	19	10	10	5	19	100	48	13	128	116	152
December	1999	16	13	8	16	14	9	6	19	100	60	13	130	117	156
January	2000	17	14	11	11	10	12	6	20	100	50	11	130	120	161
February	2000	15	14	14	7	10	15	4	21	100	49	14	163	149	153
March	2000	13	17	13	9	7	17	5	20	100	49	15	169	154	146
April	2000	14	14	9	9	8	18	9	20	100	71	15	238	223	140
May	2000	13	15	7	12	9	16	8	20	100	72	14	202	188	158
June	2000	16	11	9	13	9	16	7	20	100	65	12	205	193	187
July	2000	16	14	8	14	14	12	2	20	100	50	12	146	134	191
August	2000	16	11	7	12	17	15	5	18	100	69	15	191	175	180
September	2000	15	11	8	11	18	13	7	17	100	74	18	184	167	163
October	2000	12	12	8	11	12	14	10	21	100	79	20	234	214	150
November	2000	11	14	8	13	11	10	7	25	100	64	17	192	175	158
December	2000	10	18	6	15	11	9	6	26	100	62	16	182	166	148
January	2001	8	16	9	16	15	7	4	25	100	65	19	127	108	169
February	2001	9	16	9	16	13	9	5	24	100	63	18	147	130	164
March	2001	13	12	11	15	12	9	4	23	100	54	15	136	120	185
April	2001	14	15	10	11	10	10	6	24	100	44	14	133	119	178
May	2001	14	14	10	8	12	9	5	29	100	42	12	112	100	184
June	2001	12	14	8	5	13	11	5	31	100	65	15	143	129	176
July	2001	12	12	8	9	13	11	4	31	100	69	15	140	126	177
August	2001	13	11	9	15	11	12	4	25	100	71	17	141	125	183
September	2001	12	11	11	18	8	7	3	30	100	47	14	100	86	190
October	2001	14	10	10	15	11	8	2	31	100	45	12	113	102	187
November	2001	12	12	8	11	11	8	2	36	100	51	12	128	116	185
December	2001	14	13	8	10	12	9	3	30	100	50	11	136	125	181

EDUCATION SOME COLLEGE

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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>\$10k</u> <u>to \$24k</u>	<u>\$25k</u> <u>to \$49k</u>	<u>\$50k</u> <u>to \$99k</u>	<u>\$100k</u> <u>to \$199k</u>	<u>\$200k</u> <u>to \$499k</u>	<u>\$500k</u> <u>and up</u>	<u>DK, NA</u>	<u>Total</u>	<u>Median</u> <u>1000's</u>	<u>Percentiles</u>			<u>Cases</u>
												<u>25th</u>	<u>75th</u>	<u>Rng</u>	
January	2002	14	13	12	11	10	10	4	25	100	49	14	129	115	205
February	2002	12	13	18	10	11	10	4	22	100	41	16	120	104	211
March	2002	11	9	17	9	17	14	3	21	100	61	23	142	119	206
April	2002	13	10	13	8	18	14	2	22	100	61	20	158	138	192
May	2002	14	9	10	9	18	14	2	24	100	69	18	158	139	193
June	2002	15	14	11	9	12	10	5	23	100	48	12	144	131	201
July	2002	15	16	10	12	14	8	4	21	100	48	13	122	108	209
August	2002	15	17	13	11	13	8	4	18	100	36	11	109	98	199
September	2002	13	15	14	13	13	9	2	20	100	40	12	112	99	192
October	2002	13	12	14	13	10	11	3	24	100	44	11	127	116	179
November	2002	14	12	10	16	9	10	4	26	100	47	10	125	114	178
December	2002	15	13	11	13	8	10	4	25	100	43	11	119	108	195
January	2003	12	16	10	15	9	12	4	22	100	47	14	131	116	186
February	2003	15	15	13	13	7	12	3	23	100	41	13	120	106	180
March	2003	14	14	10	15	11	13	4	20	100	53	15	140	125	164
April	2003	15	15	13	10	13	9	4	22	100	42	13	120	107	174
August	2003	22	16	17	11	8	8	2	15	100	31	8	72	64	206
September	2003	22	13	18	12	10	7	2	15	100	32	8	85	77	190
October	2003	19	17	16	12	8	7	3	17	100	32	10	84	75	191
November	2003	17	19	13	11	10	8	4	17	100	35	10	109	99	197
December	2003	14	17	11	13	11	10	6	19	100	45	12	135	123	205
January	2004	12	18	13	11	11	11	6	18	100	43	12	146	134	232
February	2004	13	17	14	12	11	11	5	16	100	44	13	142	130	269
March	2004	14	18	15	15	11	11	4	13	100	42	14	124	110	278
April	2004	18	16	13	16	12	9	4	13	100	41	12	113	101	290
May	2004	19	16	12	16	12	8	3	14	100	39	11	104	93	271
June	2004	18	16	13	12	12	10	5	14	100	40	11	132	121	296
July	2004	18	14	12	11	11	12	5	16	100	42	10	146	135	316
August	2004	17	14	13	14	11	11	6	15	100	45	11	135	124	340
September	2004	20	11	10	18	12	9	5	14	100	54	10	124	114	323
October	2004	18	15	10	18	11	8	4	15	100	51	10	102	92	311
November	2004	20	13	10	16	13	8	3	17	100	48	9	105	96	273
December	2004	19	14	13	13	9	8	3	20	100	36	9	110	101	291
January	2005	20	13	13	12	9	9	4	19	100	35	8	119	110	291
February	2005	19	15	14	12	8	9	6	17	100	36	11	114	103	321
March	2005	20	17	13	12	10	9	4	16	100	35	11	95	84	306
April	2005	19	15	14	13	11	7	3	17	100	36	11	90	78	307
May	2005	16	14	16	13	11	8	2	19	100	37	12	94	82	284
June	2005	17	12	16	13	13	9	3	17	100	40	14	109	95	300
July	2005	16	12	17	12	14	10	2	17	100	38	15	118	104	280
August	2005	20	12	15	10	14	10	4	15	100	36	12	127	115	284
September	2005	19	13	15	10	13	10	4	16	100	35	10	130	120	287
October	2005	20	13	14	11	12	11	4	14	100	36	10	130	121	303
November	2005	21	13	15	13	10	11	4	13	100	36	9	115	106	298
December	2005	21	12	15	15	11	9	4	14	100	38	11	105	94	299
January	2006	19	12	16	14	11	9	4	16	100	38	12	101	90	295
February	2006	16	13	14	12	12	8	4	20	100	39	13	111	98	299
March	2006	18	13	12	12	10	9	5	21	100	38	10	110	100	285
April	2006	19	13	13	10	12	8	5	20	100	38	10	118	108	280

EDUCATION SOME COLLEGE

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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			Cases
												25th	75th	Rng	
May	2006	17	15	12	13	13	9	4	17	100	41	11	117	106	270
June	2006	13	18	13	13	16	9	3	15	100	44	15	126	111	271
July	2006	12	18	10	19	14	9	4	15	100	50	16	118	102	282
August	2006	10	16	12	17	16	9	5	16	100	58	19	128	110	288
September	2006	15	11	11	16	14	10	5	18	100	56	14	125	112	284
October	2006	14	12	12	12	16	11	6	16	100	58	15	147	132	280
November	2006	15	9	15	14	15	11	6	15	100	54	16	136	121	287
December	2006	12	9	18	14	14	11	5	16	100	52	20	127	107	299
January	2007	12	11	17	16	15	9	5	15	100	51	19	120	101	302
February	2007	12	14	13	16	15	8	5	17	100	49	16	123	106	306
March	2007	14	16	11	16	17	9	5	14	100	51	16	126	110	319
April	2007	14	14	10	15	17	11	5	14	100	58	17	146	129	315
May	2007	14	12	11	16	16	15	6	11	100	66	20	177	157	312
June	2007	11	11	10	18	17	15	6	11	100	72	26	185	160	282
July	2007	10	12	13	18	15	13	5	13	100	62	25	156	131	275
August	2007	9	13	15	16	15	12	4	18	100	53	24	137	112	273
September	2007	11	15	15	12	11	13	4	19	100	45	18	135	117	291
October	2007	12	15	14	12	11	12	4	19	100	45	15	136	121	285
November	2007	16	14	12	11	13	11	5	17	100	46	12	135	123	303
December	2007	14	14	12	12	14	12	5	18	100	50	14	140	126	288
January	2008	14	14	12	11	14	12	5	18	100	48	14	143	130	280
February	2008	12	15	15	10	12	12	4	18	100	45	14	132	118	254
March	2008	14	15	16	11	10	11	5	18	100	40	13	120	107	254
April	2008	12	14	16	13	12	12	4	17	100	48	18	125	107	268
May	2008	14	12	12	15	11	11	4	19	100	50	17	124	107	276
June	2008	16	10	11	17	11	12	5	20	100	54	17	146	129	284
July	2008	18	11	11	15	10	10	5	20	100	45	12	132	120	285
August	2008	15	11	13	15	11	11	5	18	100	46	16	150	135	291
September	2008	12	12	15	16	13	10	6	16	100	47	20	137	117	286
October	2008	11	10	18	18	12	10	7	15	100	50	20	135	115	289
November	2008	12	10	19	17	13	8	6	15	100	46	20	119	99	287
December	2008	14	13	14	16	13	8	5	17	100	47	15	119	104	296
January	2009	14	15	12	16	11	9	5	18	100	46	15	118	102	310
February	2009	18	14	9	17	10	11	5	16	100	46	11	128	116	320
March	2009	20	13	12	16	10	11	4	14	100	41	11	112	100	313
April	2009	20	15	12	15	11	11	3	13	100	39	10	113	102	295
May	2009	19	15	12	15	17	9	3	10	100	45	12	105	94	289
June	2009	20	13	13	15	18	9	4	9	100	47	12	118	107	286
July	2009	20	11	13	14	15	10	5	13	100	47	11	127	116	301
August	2009	18	11	14	16	13	8	5	16	100	47	14	123	109	303
September	2009	16	13	13	15	12	8	5	19	100	45	15	124	109	298
October	2009	13	13	15	13	16	8	6	16	100	47	18	135	116	283
November	2009	13	13	15	11	16	10	6	15	100	46	18	149	131	261
December	2009	14	13	15	11	17	11	5	14	100	49	17	147	130	259
January	2010	15	14	13	13	15	11	5	14	100	45	14	129	115	254
February	2010	14	17	12	14	13	10	5	15	100	43	14	115	101	269
March	2010	13	17	13	15	11	11	6	14	100	43	16	126	110	266
April	2010	10	15	15	15	14	10	7	13	100	54	20	144	123	281
May	2010	10	14	14	16	15	11	7	13	100	56	21	157	136	270
June	2010	8	13	15	16	15	10	7	15	100	58	23	149	126	288

EDUCATION SOME COLLEGE

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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			Cases
												25th	75th	Rng	
July	2010	11	13	11	15	15	11	6	19	100	61	20	150	130	276
August	2010	11	14	11	15	14	14	6	16	100	64	20	178	158	295
September	2010	14	16	8	14	13	13	5	18	100	57	16	162	145	294
October	2010	12	17	8	16	13	12	6	16	100	57	17	161	144	308
November	2010	9	17	6	17	15	11	6	18	100	65	21	149	128	293
December	2010	7	16	8	18	18	13	7	13	100	70	24	173	149	288
January	2011	7	14	10	17	16	15	6	14	100	67	26	176	151	282
February	2011	10	13	10	15	14	14	7	17	100	66	20	200	181	287
March	2011	10	11	9	16	15	12	8	19	100	74	21	190	169	289
April	2011	11	10	7	15	16	14	8	18	100	88	22	204	182	283
May	2011	10	12	10	16	16	12	8	16	100	80	23	164	140	286
June	2011	9	11	10	14	15	17	7	16	100	82	26	193	167	289
July	2011	9	16	9	14	14	14	9	16	100	75	22	207	184	285
August	2011	9	12	8	13	14	17	9	18	100	89	27	250	223	275
September	2011	8	13	8	14	13	15	10	19	100	86	26	244	218	269
October	2011	8	12	9	14	12	18	8	20	100	80	25	231	206	273
November	2011	8	14	12	17	10	14	6	18	100	61	20	176	155	282
December	2011	9	12	11	17	12	15	6	18	100	65	25	175	150	283
January	2012	6	11	12	18	12	14	5	22	100	72	31	173	141	289
February	2012	8	10	10	16	12	14	8	23	100	75	29	203	174	273
March	2012	10	11	11	13	13	13	8	21	100	72	24	197	173	256
April	2012	17	11	8	15	13	11	9	18	100	65	15	175	160	239
May	2012	15	11	13	14	13	12	7	14	100	59	18	159	140	236
June	2012	15	11	14	13	14	11	6	16	100	51	17	149	132	234
July	2012	10	9	17	10	16	15	4	18	100	67	25	170	144	257
August	2012	7	9	12	14	17	15	6	19	100	82	31	199	167	273
September	2012	7	11	8	16	16	18	7	17	100	93	31	213	182	272
October	2012	10	13	5	18	16	15	9	14	100	83	26	201	175	258
November	2012	14	11	7	16	15	15	7	14	100	77	19	196	177	255
December	2012	11	13	8	16	14	14	7	17	100	76	20	193	172	250
January	2013	11	13	11	12	14	14	6	19	100	66	19	189	169	237
February	2013	10	14	10	12	14	13	8	19	100	65	21	191	170	227
March	2013	10	12	10	11	16	12	8	21	100	73	21	195	174	226
April	2013	8	13	8	16	14	15	6	19	100	80	22	204	182	223
May	2013	9	14	7	15	12	17	5	20	100	76	19	209	190	222
June	2013	11	16	7	15	12	16	8	14	100	61	18	222	204	234
July	2013	10	15	8	14	15	15	9	14	100	69	24	223	199	235
August	2013	10	14	8	15	20	13	10	11	100	77	29	203	175	235
September	2013	9	9	9	18	20	14	6	15	100	83	32	182	151	240
October	2013	9	10	10	19	18	12	6	17	100	69	28	161	133	252
November	2013	9	10	10	19	16	10	3	23	100	62	23	140	117	222
December	2013	9	11	9	19	14	10	6	22	100	60	24	175	152	226
January	2014	14	9	6	16	14	13	8	20	100	74	20	222	202	230
February	2014	13	8	6	15	15	17	9	16	100	88	28	259	231	262
March	2014	14	9	9	14	17	17	7	14	100	83	24	211	186	266
April	2014	11	8	13	13	16	18	6	15	100	84	30	216	186	267
May	2014	9	13	14	13	12	16	6	16	100	68	22	189	166	267
June	2014	10	14	12	12	13	15	8	16	100	75	22	210	188	248
July	2014	12	16	9	14	13	13	6	16	100	64	17	171	154	251
August	2014	16	12	10	11	14	15	8	14	100	64	16	204	188	246

EDUCATION SOME COLLEGE

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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>DK, NA</u>	<u>Total</u>	<u>Median</u> <u>1000's</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>25th</u>	<u>75th</u>	<u>Rng</u>	
September	2014	15	12	8	14	12	16	8	15	100	65	17	215	198	248
October	2014	13	11	8	15	13	17	9	14	100	71	19	234	215	243
November	2014	14	10	5	16	13	16	9	16	100	72	18	224	205	250
December	2014	14	9	7	15	14	14	9	18	100	75	22	208	186	246
January	2015	14	9	9	12	14	14	10	19	100	75	22	213	192	244
February	2015	12	9	10	13	16	13	8	19	100	79	23	191	168	240
March	2015	13	9	10	12	14	14	8	20	100	72	19	220	201	238
April	2015	13	10	9	11	16	14	7	20	100	76	18	210	192	228
May	2015	11	10	9	10	17	17	8	18	100	88	24	237	213	237
June	2015	10	12	9	13	18	16	8	14	100	88	26	214	188	246
July	2015	9	12	11	16	16	15	8	13	100	77	27	199	172	265
August	2015	11	12	14	15	14	14	8	13	100	66	24	187	163	262
September	2015	13	11	13	14	14	14	7	14	100	66	19	180	161	268
October	2015	15	11	11	12	13	17	8	15	100	70	15	201	186	259
November	2015	14	14	8	14	12	18	7	14	100	73	13	205	193	262
December	2015	14	16	10	11	11	15	9	15	100	63	12	200	188	261
January	2016	13	16	10	13	11	14	9	15	100	65	16	198	182	257
February	2016	17	13	13	11	10	12	9	16	100	50	14	184	170	245
March	2016	18	12	13	13	11	12	8	13	100	50	13	166	153	249
April	2016	18	14	11	12	11	13	8	14	100	48	11	174	163	270
May	2016	16	13	11	13	11	14	9	13	100	54	13	194	181	291
June	2016	14	14	10	11	14	15	10	11	100	60	16	213	197	274
July	2016	14	13	12	11	16	11	12	11	100	56	18	190	171	282
August	2016	12	13	11	14	19	10	11	9	100	64	22	170	149	270
September	2016	13	13	9	17	16	12	9	11	100	61	19	169	151	298
October	2016	13	14	7	18	15	13	8	12	100	67	18	179	161	289
November	2016	14	13	7	15	15	15	8	13	100	74	17	202	185	294
December	2016	10	15	8	13	19	12	10	12	100	86	22	195	174	273
January	2017	10	15	11	14	18	13	10	9	100	78	22	194	173	277
February	2017	14	16	9	16	16	11	10	7	100	66	17	161	144	282
March	2017	16	13	11	15	13	14	9	9	100	58	17	180	163	295
April	2017	17	15	10	13	12	13	9	11	100	56	14	183	168	297
May	2017	12	15	10	14	11	13	11	14	100	61	18	205	187	309
June	2017	12	17	9	13	11	11	13	14	100	59	14	210	195	311
July	2017	14	13	10	16	11	11	13	12	100	59	14	206	191	294
August	2017	16	10	9	15	10	14	12	14	100	61	15	237	222	280
September	2017	14	11	10	18	10	13	9	15	100	60	17	209	192	294
October	2017	14	11	10	16	11	14	8	16	100	63	17	209	192	317
November	2017	14	13	11	14	13	14	7	14	100	58	15	195	180	336
December	2017	17	13	10	12	13	12	9	13	100	58	13	195	182	316
January	2018	18	14	11	11	13	10	9	14	100	50	12	169	157	301
February	2018	17	13	10	12	13	11	10	13	100	64	14	178	163	302