

# EDUCATION SOME COLLEGE

## 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   |

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**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> |              |
| 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          |

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

| <u>Date of Survey</u> |      | Under | \$10k    | \$25k    | \$50k    | \$100k    | \$200k    | \$500k |        |       | Median | Percentiles |      |     | Cases |
|-----------------------|------|-------|----------|----------|----------|-----------|-----------|--------|--------|-------|--------|-------------|------|-----|-------|
|                       |      | \$10k | to \$24k | to \$49k | to \$99k | to \$199k | to \$499k | and up | DK, NA | Total | 1000's | 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   |

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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> |              |
| 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

**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> |              |
| 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          |
| March                 | 2018 | 14                 | 12                    | 10                    | 12                    | 12                      | 15                      | 10                   | 15            | 100          | 74                   | 19                 | 218         | 199        | 336          |
| April                 | 2018 | 11                 | 14                    | 9                     | 14                    | 11                      | 17                      | 11                   | 13            | 100          | 79                   | 21                 | 253         | 232        | 358          |
| May                   | 2018 | 13                 | 15                    | 10                    | 15                    | 8                       | 17                      | 9                    | 13            | 100          | 60                   | 17                 | 233         | 216        | 349          |
| June                  | 2018 | 13                 | 16                    | 10                    | 16                    | 9                       | 16                      | 10                   | 10            | 100          | 56                   | 14                 | 211         | 198        | 318          |
| July                  | 2018 | 13                 | 13                    | 9                     | 16                    | 11                      | 13                      | 11                   | 13            | 100          | 61                   | 15                 | 210         | 195        | 294          |
| August                | 2018 | 11                 | 11                    | 9                     | 15                    | 16                      | 11                      | 14                   | 13            | 100          | 77                   | 19                 | 225         | 206        | 303          |
| September             | 2018 | 12                 | 9                     | 10                    | 14                    | 14                      | 13                      | 13                   | 15            | 100          | 79                   | 22                 | 245         | 223        | 332          |
| October               | 2018 | 13                 | 8                     | 14                    | 13                    | 14                      | 14                      | 13                   | 12            | 100          | 76                   | 24                 | 244         | 219        | 341          |

**EDUCATION SOME COLLEGE**

**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> |              |
| November              | 2018 | 14           | 9               | 14              | 14              | 12               | 17               | 10            | 10            | 100          | 71            | 23                 | 226         | 203        | 355          |
| December              | 2018 | 16           | 10              | 12              | 15              | 12               | 16               | 10            | 9             | 100          | 68            | 18                 | 206         | 188        | 344          |
| January               | 2019 | 15           | 10              | 10              | 12              | 13               | 17               | 12            | 11            | 100          | 98            | 19                 | 244         | 225        | 339          |
| February              | 2019 | 14           | 10              | 7               | 12              | 14               | 16               | 13            | 12            | 100          | 101           | 19                 | 244         | 225        | 322          |
| March                 | 2019 | 12           | 10              | 10              | 12              | 15               | 15               | 13            | 14            | 100          | 101           | 22                 | 241         | 219        | 322          |
| April                 | 2019 | 14           | 10              | 8               | 13              | 16               | 14               | 12            | 12            | 100          | 86            | 17                 | 221         | 204        | 324          |
| May                   | 2019 | 13           | 9               | 11              | 14              | 16               | 16               | 11            | 12            | 100          | 83            | 21                 | 216         | 195        | 328          |
| June                  | 2019 | 13           | 10              | 8               | 13              | 17               | 17               | 12            | 11            | 100          | 92            | 19                 | 246         | 226        | 319          |
| July                  | 2019 | 12           | 11              | 7               | 14              | 16               | 18               | 11            | 11            | 100          | 88            | 21                 | 242         | 220        | 320          |
| August                | 2019 | 14           | 10              | 5               | 15              | 15               | 17               | 12            | 12            | 100          | 92            | 21                 | 267         | 245        | 299          |
| September             | 2019 | 16           | 8               | 6               | 15              | 13               | 15               | 12            | 15            | 100          | 84            | 23                 | 283         | 260        | 303          |
| October               | 2019 | 17           | 10              | 7               | 14              | 14               | 12               | 10            | 15            | 100          | 70            | 20                 | 244         | 224        | 311          |
| November              | 2019 | 16           | 11              | 9               | 12              | 13               | 12               | 11            | 16            | 100          | 67            | 18                 | 226         | 209        | 331          |
| December              | 2019 | 18           | 10              | 10              | 12              | 15               | 14               | 9             | 12            | 100          | 67            | 15                 | 209         | 194        | 339          |
| January               | 2020 | 15           | 9               | 9               | 13              | 15               | 16               | 12            | 12            | 100          | 81            | 17                 | 242         | 226        | 337          |
| February              | 2020 | 15           | 11              | 7               | 13              | 15               | 14               | 14            | 12            | 100          | 86            | 16                 | 266         | 250        | 335          |
| March                 | 2020 | 15           | 11              | 7               | 12              | 12               | 13               | 15            | 14            | 100          | 78            | 15                 | 252         | 238        | 336          |
| April                 | 2020 | 16           | 13              | 10              | 11              | 9                | 13               | 13            | 16            | 100          | 61            | 14                 | 241         | 227        | 319          |
| May                   | 2020 | 17           | 12              | 10              | 11              | 10               | 14               | 9             | 17            | 100          | 51            | 10                 | 200         | 190        | 319          |
| June                  | 2020 | 17           | 14              | 9               | 11              | 12               | 14               | 8             | 16            | 100          | 52            | 11                 | 190         | 179        | 319          |
| July                  | 2020 | 19           | 11              | 9               | 11              | 13               | 13               | 8             | 16            | 100          | 60            | 10                 | 188         | 178        | 335          |
| August                | 2020 | 20           | 11              | 10              | 11              | 12               | 12               | 12            | 13            | 100          | 59            | 10                 | 213         | 203        | 329          |
| September             | 2020 | 19           | 11              | 10              | 12              | 10               | 13               | 13            | 12            | 100          | 63            | 13                 | 213         | 201        | 313          |
| October               | 2020 | 19           | 11              | 10              | 10              | 11               | 14               | 14            | 12            | 100          | 66            | 13                 | 225         | 212        | 303          |
| November              | 2020 | 17           | 13              | 9               | 11              | 12               | 12               | 13            | 13            | 100          | 64            | 15                 | 189         | 174        | 304          |
| December              | 2020 | 16           | 12              | 9               | 11              | 13               | 14               | 12            | 14            | 100          | 71            | 15                 | 208         | 193        | 318          |
| January               | 2021 | 14           | 12              | 8               | 14              | 14               | 14               | 11            | 14            | 100          | 74            | 18                 | 201         | 183        | 311          |
| February              | 2021 | 13           | 13              | 7               | 15              | 13               | 15               | 10            | 13            | 100          | 75            | 19                 | 224         | 205        | 303          |
| March                 | 2021 | 15           | 13              | 8               | 15              | 12               | 13               | 10            | 14            | 100          | 64            | 16                 | 200         | 185        | 284          |
| April                 | 2021 | 15           | 13              | 10              | 12              | 11               | 12               | 13            | 13            | 100          | 65            | 15                 | 263         | 249        | 285          |
| May                   | 2021 | 18           | 11              | 12              | 8               | 9                | 12               | 16            | 14            | 100          | 59            | 12                 | 315         | 303        | 299          |
| June                  | 2021 | 19           | 12              | 12              | 6               | 9                | 12               | 17            | 14            | 100          | 54            | 12                 | 322         | 310        | 318          |
| July                  | 2021 | 19           | 12              | 9               | 9               | 10               | 13               | 13            | 15            | 100          | 55            | 12                 | 272         | 260        | 328          |
| August                | 2021 | 18           | 11              | 8               | 11              | 11               | 12               | 12            | 18            | 100          | 60            | 12                 | 225         | 213        | 329          |
| September             | 2021 | 17           | 10              | 8               | 13              | 11               | 13               | 12            | 16            | 100          | 69            | 13                 | 250         | 237        | 313          |
| October               | 2021 | 18           | 8               | 7               | 14              | 11               | 15               | 13            | 13            | 100          | 72            | 15                 | 272         | 257        | 310          |
| November              | 2021 | 18           | 10              | 8               | 15              | 11               | 17               | 13            | 9             | 100          | 73            | 16                 | 267         | 251        | 305          |
| December              | 2021 | 17           | 11              | 8               | 14              | 12               | 17               | 12            | 8             | 100          | 71            | 17                 | 255         | 238        | 322          |
| January               | 2022 | 16           | 12              | 10              | 11              | 11               | 15               | 13            | 11            | 100          | 62            | 17                 | 260         | 243        | 336          |
| February              | 2022 | 17           | 10              | 9               | 10              | 13               | 14               | 14            | 12            | 100          | 69            | 15                 | 268         | 253        | 337          |
| March                 | 2022 | 15           | 10              | 8               | 11              | 13               | 14               | 14            | 15            | 100          | 81            | 18                 | 289         | 271        | 317          |
| April                 | 2022 | 15           | 11              | 6               | 12              | 15               | 15               | 13            | 14            | 100          | 88            | 16                 | 257         | 241        | 290          |
| May                   | 2022 | 16           | 9               | 7               | 10              | 15               | 14               | 12            | 17            | 100          | 79            | 16                 | 250         | 234        | 287          |
| June                  | 2022 | 19           | 9               | 8               | 10              | 14               | 12               | 13            | 14            | 100          | 68            | 11                 | 226         | 216        | 306          |
| July                  | 2022 | 18           | 8               | 11              | 9               | 13               | 12               | 12            | 16            | 100          | 62            | 12                 | 249         | 237        | 321          |
| August                | 2022 | 15           | 9               | 10              | 10              | 13               | 13               | 11            | 19            | 100          | 74            | 16                 | 250         | 233        | 334          |
| September             | 2022 | 12           | 11              | 10              | 10              | 12               | 14               | 10            | 22            | 100          | 72            | 18                 | 250         | 231        | 320          |
| October               | 2022 | 16           | 10              | 6               | 12              | 13               | 13               | 11            | 20            | 100          | 76            | 14                 | 220         | 206        | 316          |
| November              | 2022 | 18           | 11              | 7               | 12              | 12               | 15               | 10            | 14            | 100          | 63            | 11                 | 215         | 204        | 321          |
| December              | 2022 | 19           | 9               | 8               | 13              | 14               | 14               | 10            | 14            | 100          | 64            | 13                 | 191         | 179        | 337          |

**EDUCATION SOME COLLEGE**

**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 | 14           | 12              | 11              | 11              | 14               | 14               | 9             | 15            | 100          | 59            | 17                 | 191         | 176        | 325          |
| February              | 2023 | 16           | 11              | 11              | 10              | 14               | 11               | 11            | 17            | 100          | 58            | 15                 | 188         | 174        | 308          |
| March                 | 2023 | 17           | 11              | 10              | 11              | 11               | 11               | 12            | 17            | 100          | 58            | 14                 | 213         | 200        | 295          |
| April                 | 2023 | 19           | 8               | 11              | 12              | 11               | 11               | 11            | 17            | 100          | 54            | 13                 | 214         | 201        | 311          |
| May                   | 2023 | 14           | 9               | 10              | 14              | 10               | 11               | 13            | 19            | 100          | 58            | 18                 | 247         | 229        | 311          |
| June                  | 2023 | 17           | 9               | 9               | 12              | 11               | 13               | 10            | 19            | 100          | 54            | 14                 | 230         | 216        | 303          |
| July                  | 2023 | 18           | 9               | 6               | 16              | 9                | 13               | 11            | 17            | 100          | 63            | 15                 | 253         | 238        | 285          |
| August                | 2023 | 17           | 7               | 8               | 15              | 11               | 15               | 10            | 17            | 100          | 70            | 19                 | 231         | 212        | 271          |
| September             | 2023 | 14           | 8               | 8               | 17              | 10               | 14               | 11            | 18            | 100          | 71            | 22                 | 245         | 222        | 298          |
| October               | 2023 | 14           | 9               | 9               | 13              | 10               | 14               | 12            | 19            | 100          | 69            | 21                 | 267         | 246        | 312          |