# INCOME MIDDLE THIRD
# TABLE 21
# CURRENT VALUE OF STOCK MARKET INVESTMENTS
# (Three Month Moving Averages)

"Do you (or any member of your family living there) have any investments in the stock market, including any publicly traded stock that is directly owned, stocks in mutual funds, stocks in any of your retirement accounts, including 401(K)s, IRAs, or Keogh accounts?"
"Considering all of your (family's) investments in the stock market, overall about how much would your investments be worth today?"

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| March | 1990 | 46 | 18 | 8 | 8 | 3 | 2 | 0 | 15 | 100 | 8 | 3 | 24 | 22 | 331 |
| April | 1990 | 44 | 16 | 10 | 8 | 4 | 2 | 0 | 16 | 100 | 9 | 3 | 29 | 27 | 342 |
| September | 1997 | 21 | 19 | 13 | 16 | 11 | 6 | 2 | 11 | 100 | 32 | 10 | 78 | 68 | 155 |
| February | 1998 | 20 | 22 | 10 | 13 | 11 | 4 | 2 | 19 | 100 | 27 | 10 | 83 | 73 | 137 |
| November | 1998 | 22 | 17 | 14 | 9 | 8 | 9 | 1 | 21 | 100 | 24 | 7 | 82 | 74 | 197 |
| December | 1998 | 21 | 17 | 14 | 9 | 8 | 12 | 0 | 19 | 100 | 25 | 8 | 90 | 82 | 199 |
| January | 1999 | 24 | 18 | 17 | 10 | 5 | 10 | 0 | 16 | 100 | 23 | 8 | 67 | 59 | 194 |
| February | 1999 | 25 | 16 | 16 | 11 | 8 | 7 | 0 | 17 | 100 | 24 | 7 | 76 | 69 | 204 |
| March | 1999 | 23 | 15 | 15 | 14 | 9 | 3 | 1 | 20 | 100 | 27 | 9 | 68 | 59 | 213 |
| April | 1999 | 18 | 13 | 14 | 17 | 11 | 5 | 1 | 22 | 100 | 36 | 13 | 84 | 71 | 226 |
| May | 1999 | 14 | 14 | 16 | 17 | 9 | 4 | 2 | 22 | 100 | 38 | 16 | 75 | 59 | 216 |
| June | 1999 | 17 | 16 | 16 | 16 | 10 | 4 | 3 | 17 | 100 | 33 | 14 | 72 | 59 | 220 |
| July | 1999 | 18 | 19 | 16 | 17 | 9 | 2 | 3 | 15 | 100 | 31 | 12 | 63 | 51 | 213 |
| August | 1999 | 20 | 21 | 14 | 14 | 12 | 4 | 3 | 12 | 100 | 30 | 10 | 75 | 64 | 212 |
| September | 1999 | 16 | 22 | 13 | 17 | 13 | 4 | 2 | 14 | 100 | 38 | 13 | 82 | 68 | 200 |
| October | 1999 | 17 | 21 | 10 | 16 | 13 | 4 | 2 | 16 | 100 | 33 | 12 | 86 | 73 | 212 |
| November | 1999 | 15 | 25 | 12 | 19 | 10 | 2 | 3 | 14 | 100 | 31 | 11 | 69 | 57 | 201 |
| December | 1999 | 18 | 21 | 16 | 12 | 10 | 3 | 3 | 17 | 100 | 26 | 9 | 65 | 56 | 200 |
| January | 2000 | 18 | 17 | 21 | 10 | 8 | 4 | 3 | 20 | 100 | 29 | 9 | 60 | 51 | 212 |
| February | 2000 | 16 | 13 | 19 | 8 | 9 | 8 | 4 | 23 | 100 | 37 | 13 | 116 | 104 | 217 |
| March | 2000 | 11 | 15 | 18 | 12 | 10 | 8 | 4 | 22 | 100 | 41 | 16 | 124 | 108 | 222 |
| April | 2000 | 11 | 16 | 15 | 10 | 10 | 11 | 4 | 23 | 100 | 41 | 16 | 153 | 137 | 215 |
| May | 2000 | 13 | 15 | 16 | 13 | 8 | 8 | 3 | 24 | 100 | 37 | 13 | 100 | 86 | 237 |
| June | 2000 | 19 | 11 | 14 | 12 | 7 | 9 | 2 | 25 | 100 | 34 | 9 | 93 | 84 | 226 |
| July | 2000 | 15 | 12 | 15 | 16 | 10 | 10 | 2 | 20 | 100 | 42 | 13 | 95 | 82 | 219 |
| August | 2000 | 17 | 12 | 14 | 12 | 12 | 14 | 2 | 17 | 100 | 43 | 15 | 150 | 135 | 201 |
| September | 2000 | 14 | 16 | 13 | 13 | 12 | 14 | 3 | 16 | 100 | 44 | 17 | 153 | 136 | 226 |
| October | 2000 | 17 | 17 | 13 | 10 | 12 | 10 | 4 | 17 | 100 | 37 | 14 | 138 | 124 | 221 |
| November | 2000 | 17 | 16 | 13 | 15 | 11 | 6 | 2 | 20 | 100 | 35 | 12 | 89 | 77 | 229 |
| December | 2000 | 20 | 14 | 13 | 13 | 9 | 6 | 2 | 22 | 100 | 31 | 9 | 85 | 76 | 198 |
| January | 2001 | 17 | 16 | 14 | 15 | 8 | 7 | 1 | 24 | 100 | 32 | 10 | 77 | 66 | 221 |
| February | 2001 | 17 | 16 | 15 | 13 | 8 | 8 | 1 | 21 | 100 | 33 | 10 | 83 | 72 | 222 |
| March | 2001 | 15 | 18 | 15 | 14 | 10 | 7 | 1 | 20 | 100 | 32 | 11 | 85 | 73 | 252 |
| April | 2001 | 15 | 17 | 14 | 15 | 10 | 7 | 1 | 22 | 100 | 33 | 13 | 86 | 73 | 241 |
| May | 2001 | 16 | 20 | 11 | 14 | 10 | 4 | 1 | 25 | 100 | 26 | 12 | 72 | 60 | 243 |
| June | 2001 | 14 | 20 | 10 | 12 | 11 | 6 | 1 | 26 | 100 | 30 | 13 | 81 | 68 | 224 |
| July | 2001 | 14 | 20 | 11 | 10 | 11 | 7 | 2 | 26 | 100 | 30 | 13 | 88 | 76 | 227 |
| August | 2001 | 13 | 16 | 11 | 12 | 10 | 9 | 3 | 26 | 100 | 38 | 14 | 106 | 92 | 238 |
| September | 2001 | 14 | 13 | 13 | 14 | 8 | 8 | 3 | 27 | 100 | 39 | 13 | 94 | 81 | 266 |
| October | 2001 | 14 | 11 | 13 | 15 | 9 | 9 | 2 | 26 | 100 | 42 | 14 | 97 | 83 | 271 |
| November | 2001 | 13 | 13 | 11 | 14 | 9 | 10 | 3 | 27 | 100 | 45 | 14 | 109 | 95 | 271 |
| December | 2001 | 13 | 14 | 12 | 15 | 10 | 9 | 2 | 25 | 100 | 45 | 15 | 111 | 96 | 253 |
| January | 2002 | 15 | 15 | 14 | 12 | 8 | 7 | 3 | 27 | 100 | 38 | 12 | 90 | 77 | 268 |
| February | 2002 | 14 | 16 | 18 | 10 | 7 | 8 | 3 | 25 | 100 | 32 | 13 | 103 | 90 | 269 |

# INCOME MIDDLE THIRD
# TABLE 21
# CURRENT VALUE OF STOCK MARKET INVESTMENTS
# (Three Month Moving Averages)

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Percentiles Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| March | 2002 | 15 | 17 | 17 | 7 | 7 | 8 | 4 | 24 | 100 | 29 | 12 | 108 | 96 | 276 |
| April | 2002 | 14 | 16 | 17 | 9 | 9 | 11 | 4 | 20 | 100 | 35 | 13 | 132 | 119 | 271 |
| May | 2002 | 15 | 16 | 15 | 10 | 11 | 11 | 3 | 19 | 100 | 36 | 11 | 114 | 103 | 280 |
| June | 2002 | 14 | 18 | 14 | 12 | 11 | 11 | 2 | 18 | 100 | 36 | 11 | 114 | 102 | 287 |
| July | 2002 | 16 | 19 | 11 | 11 | 12 | 11 | 2 | 18 | 100 | 35 | 10 | 123 | 113 | 281 |
| August | 2002 | 13 | 21 | 11 | 12 | 11 | 9 | 2 | 22 | 100 | 34 | 12 | 109 | 97 | 259 |
| September | 2002 | 15 | 17 | 15 | 13 | 11 | 9 | 1 | 19 | 100 | 36 | 12 | 106 | 95 | 242 |
| October | 2002 | 16 | 18 | 15 | 15 | 10 | 8 | 1 | 18 | 100 | 35 | 10 | 83 | 72 | 251 |
| November | 2002 | 22 | 18 | 14 | 15 | 11 | 7 | 0 | 13 | 100 | 31 | 8 | 75 | 67 | 251 |
| December | 2002 | 21 | 19 | 11 | 12 | 11 | 6 | 1 | 17 | 100 | 28 | 8 | 81 | 73 | 284 |
| January | 2003 | 19 | 22 | 12 | 10 | 10 | 9 | 1 | 17 | 100 | 25 | 9 | 82 | 73 | 262 |
| February | 2003 | 18 | 17 | 16 | 11 | 9 | 8 | 1 | 21 | 100 | 30 | 10 | 84 | 75 | 268 |
| March | 2003 | 17 | 20 | 15 | 11 | 8 | 10 | 1 | 19 | 100 | 29 | 10 | 86 | 76 | 239 |
| April | 2003 | 20 | 18 | 14 | 9 | 9 | 7 | 2 | 21 | 100 | 26 | 9 | 74 | 66 | 263 |
| August | 2003 | 26 | 20 | 12 | 13 | 8 | 6 | 2 | 12 | 100 | 22 | 6 | 67 | 62 | 298 |
| September | 2003 | 24 | 20 | 13 | 12 | 8 | 8 | 2 | 13 | 100 | 23 | 8 | 72 | 65 | 308 |
| October | 2003 | 20 | 20 | 14 | 11 | 7 | 8 | 2 | 17 | 100 | 25 | 9 | 76 | 67 | 313 |
| November | 2003 | 16 | 23 | 14 | 11 | 9 | 7 | 3 | 17 | 100 | 29 | 11 | 81 | 70 | 325 |
| December | 2003 | 18 | 19 | 15 | 12 | 10 | 6 | 3 | 17 | 100 | 31 | 11 | 84 | 73 | 318 |
| January | 2004 | 18 | 22 | 15 | 12 | 10 | 5 | 5 | 13 | 100 | 29 | 11 | 83 | 72 | 331 |
| February | 2004 | 22 | 23 | 15 | 12 | 9 | 4 | 5 | 11 | 100 | 23 | 8 | 72 | 64 | 334 |
| March | 2004 | 21 | 24 | 12 | 13 | 8 | 6 | 5 | 10 | 100 | 26 | 8 | 78 | 70 | 334 |
| April | 2004 | 22 | 22 | 11 | 14 | 11 | 7 | 3 | 10 | 100 | 29 | 8 | 86 | 77 | 338 |
| May | 2004 | 17 | 19 | 14 | 16 | 12 | 8 | 3 | 12 | 100 | 35 | 13 | 95 | 82 | 330 |
| June | 2004 | 15 | 17 | 18 | 14 | 13 | 7 | 3 | 13 | 100 | 35 | 13 | 94 | 80 | 338 |
| July | 2004 | 14 | 16 | 19 | 14 | 12 | 9 | 1 | 15 | 100 | 38 | 14 | 94 | 80 | 346 |
| August | 2004 | 15 | 17 | 21 | 13 | 11 | 9 | 2 | 13 | 100 | 35 | 13 | 91 | 78 | 348 |
| September | 2004 | 17 | 17 | 16 | 15 | 9 | 10 | 2 | 13 | 100 | 33 | 12 | 91 | 79 | 332 |
| October | 2004 | 17 | 18 | 14 | 16 | 10 | 9 | 3 | 13 | 100 | 32 | 12 | 93 | 80 | 349 |
| November | 2004 | 22 | 16 | 12 | 14 | 11 | 8 | 2 | 15 | 100 | 31 | 8 | 93 | 85 | 354 |
| December | 2004 | 22 | 15 | 16 | 11 | 12 | 6 | 3 | 15 | 100 | 34 | 9 | 90 | 81 | 356 |
| January | 2005 | 25 | 16 | 16 | 10 | 10 | 7 | 3 | 13 | 100 | 29 | 7 | 82 | 74 | 335 |
| February | 2005 | 24 | 17 | 16 | 10 | 8 | 7 | 3 | 13 | 100 | 27 | 8 | 76 | 68 | 351 |
| March | 2005 | 23 | 19 | 13 | 12 | 9 | 8 | 2 | 14 | 100 | 26 | 8 | 77 | 69 | 356 |
| April | 2005 | 22 | 15 | 14 | 12 | 10 | 8 | 1 | 17 | 100 | 31 | 9 | 79 | 71 | 367 |
| May | 2005 | 20 | 18 | 13 | 12 | 9 | 9 | 1 | 17 | 100 | 30 | 10 | 81 | 72 | 372 |
| June | 2005 | 21 | 17 | 15 | 13 | 8 | 8 | 3 | 15 | 100 | 31 | 9 | 79 | 69 | 371 |
| July | 2005 | 22 | 19 | 14 | 12 | 9 | 7 | 3 | 13 | 100 | 26 | 9 | 78 | 69 | 369 |
| August | 2005 | 21 | 16 | 16 | 13 | 11 | 7 | 3 | 12 | 100 | 32 | 11 | 90 | 78 | 349 |
| September | 2005 | 20 | 17 | 14 | 13 | 11 | 9 | 2 | 14 | 100 | 31 | 11 | 93 | 81 | 355 |
| October | 2005 | 20 | 16 | 14 | 16 | 9 | 10 | 1 | 14 | 100 | 32 | 11 | 92 | 80 | 346 |
| November | 2005 | 21 | 17 | 13 | 17 | 9 | 8 | 1 | 13 | 100 | 29 | 9 | 85 | 76 | 363 |
| December | 2005 | 21 | 16 | 15 | 16 | 9 | 8 | 3 | 12 | 100 | 32 | 9 | 88 | 79 | 376 |
| January | 2006 | 20 | 16 | 16 | 15 | 10 | 8 | 3 | 12 | 100 | 34 | 10 | 91 | 80 | 366 |
| February | 2006 | 19 | 14 | 14 | 16 | 10 | 10 | 4 | 13 | 100 | 40 | 12 | 100 | 89 | 339 |
| March | 2006 | 19 | 16 | 11 | 17 | 9 | 11 | 4 | 13 | 100 | 36 | 12 | 102 | 91 | 301 |
| April | 2006 | 16 | 17 | 14 | 15 | 11 | 11 | 3 | 12 | 100 | 35 | 13 | 109 | 95 | 288 |
| May | 2006 | 15 | 19 | 14 | 16 | 10 | 10 | 4 | 12 | 100 | 33 | 13 | 102 | 89 | 287 |
| June | 2006 | 15 | 17 | 14 | 17 | 13 | 8 | 3 | 13 | 100 | 39 | 13 | 106 | 93 | 307 |
| July | 2006 | 17 | 19 | 10 | 18 | 11 | 7 | 4 | 14 | 100 | 39 | 10 | 100 | 89 | 308 |
| August | 2006 | 16 | 17 | 11 | 16 | 15 | 9 | 4 | 14 | 100 | 44 | 13 | 113 | 99 | 305 |
| September | 2006 | 15 | 17 | 14 | 13 | 14 | 8 | 4 | 14 | 100 | 40 | 14 | 103 | 89 | 303 |
| October | 2006 | 15 | 16 | 15 | 12 | 16 | 9 | 4 | 13 | 100 | 43 | 14 | 117 | 103 | 323 |

# INCOME MIDDLE THIRD
# TABLE 21
# CURRENT VALUE OF STOCK MARKET INVESTMENTS
# (Three Month Moving Averages)

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Percentiles Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| November | 2006 | 16 | 17 | 17 | 12 | 12 | 9 | 4 | 13 | 100 | 36 | 13 | 109 | 96 | 332 |
| December | 2006 | 13 | 16 | 19 | 13 | 10 | 9 | 4 | 15 | 100 | 39 | 14 | 104 | 91 | 329 |
| January | 2007 | 12 | 18 | 19 | 14 | 10 | 9 | 4 | 15 | 100 | 39 | 16 | 99 | 83 | 327 |
| February | 2007 | 11 | 20 | 18 | 14 | 10 | 7 | 5 | 16 | 100 | 37 | 15 | 98 | 84 | 342 |
| March | 2007 | 14 | 20 | 15 | 14 | 12 | 7 | 6 | 12 | 100 | 37 | 15 | 103 | 88 | 340 |
| April | 2007 | 14 | 18 | 14 | 17 | 12 | 9 | 5 | 12 | 100 | 40 | 15 | 99 | 84 | 320 |
| May | 2007 | 16 | 14 | 14 | 17 | 13 | 11 | 5 | 10 | 100 | 47 | 17 | 114 | 98 | 313 |
| June | 2007 | 13 | 14 | 15 | 17 | 13 | 11 | 4 | 12 | 100 | 48 | 18 | 116 | 98 | 322 |
| July | 2007 | 12 | 16 | 15 | 16 | 13 | 10 | 5 | 13 | 100 | 51 | 18 | 123 | 106 | 347 |
| August | 2007 | 11 | 19 | 17 | 14 | 12 | 7 | 5 | 14 | 100 | 43 | 17 | 101 | 85 | 336 |
| September | 2007 | 10 | 19 | 15 | 14 | 12 | 10 | 5 | 15 | 100 | 47 | 18 | 117 | 100 | 337 |
| October | 2007 | 12 | 19 | 17 | 13 | 10 | 11 | 4 | 14 | 100 | 41 | 17 | 110 | 93 | 325 |
| November | 2007 | 14 | 16 | 12 | 15 | 12 | 11 | 3 | 16 | 100 | 45 | 16 | 120 | 105 | 346 |
| December | 2007 | 16 | 15 | 13 | 14 | 12 | 12 | 3 | 15 | 100 | 44 | 14 | 116 | 102 | 340 |
| January | 2008 | 16 | 17 | 11 | 12 | 12 | 11 | 4 | 15 | 100 | 43 | 13 | 129 | 117 | 339 |
| February | 2008 | 15 | 17 | 14 | 12 | 11 | 12 | 4 | 14 | 100 | 41 | 13 | 133 | 120 | 318 |
| March | 2008 | 14 | 19 | 15 | 11 | 10 | 12 | 4 | 15 | 100 | 36 | 13 | 120 | 107 | 344 |
| April | 2008 | 16 | 17 | 17 | 10 | 10 | 13 | 3 | 14 | 100 | 36 | 12 | 123 | 111 | 349 |
| May | 2008 | 18 | 15 | 15 | 12 | 9 | 11 | 4 | 16 | 100 | 37 | 11 | 110 | 99 | 358 |
| June | 2008 | 21 | 14 | 14 | 15 | 9 | 10 | 4 | 14 | 100 | 39 | 10 | 111 | 101 | 332 |
| July | 2008 | 19 | 16 | 12 | 16 | 10 | 8 | 4 | 15 | 100 | 38 | 10 | 96 | 86 | 332 |
| August | 2008 | 16 | 16 | 12 | 17 | 12 | 11 | 4 | 13 | 100 | 44 | 14 | 126 | 113 | 347 |
| September | 2008 | 13 | 17 | 13 | 18 | 12 | 12 | 4 | 11 | 100 | 45 | 16 | 125 | 109 | 382 |
| October | 2008 | 15 | 13 | 13 | 19 | 14 | 10 | 4 | 13 | 100 | 49 | 16 | 123 | 108 | 389 |
| November | 2008 | 15 | 15 | 14 | 17 | 14 | 7 | 3 | 15 | 100 | 42 | 15 | 100 | 85 | 380 |
| December | 2008 | 17 | 17 | 13 | 15 | 15 | 6 | 3 | 15 | 100 | 40 | 13 | 96 | 83 | 361 |
| January | 2009 | 18 | 22 | 12 | 15 | 13 | 7 | 2 | 13 | 100 | 34 | 13 | 90 | 77 | 348 |
| February | 2009 | 21 | 19 | 12 | 16 | 11 | 8 | 2 | 11 | 100 | 33 | 10 | 90 | 80 | 330 |
| March | 2009 | 20 | 16 | 13 | 16 | 11 | 10 | 4 | 11 | 100 | 38 | 12 | 99 | 88 | 330 |
| April | 2009 | 18 | 14 | 13 | 16 | 10 | 11 | 5 | 12 | 100 | 43 | 11 | 106 | 94 | 331 |
| May | 2009 | 16 | 15 | 14 | 15 | 11 | 11 | 6 | 12 | 100 | 45 | 13 | 116 | 102 | 349 |
| June | 2009 | 15 | 16 | 16 | 14 | 11 | 9 | 5 | 14 | 100 | 42 | 14 | 111 | 96 | 343 |
| July | 2009 | 17 | 16 | 19 | 11 | 11 | 9 | 5 | 12 | 100 | 36 | 14 | 117 | 102 | 341 |
| August | 2009 | 18 | 17 | 19 | 12 | 11 | 7 | 4 | 12 | 100 | 35 | 13 | 101 | 88 | 359 |
| September | 2009 | 17 | 16 | 17 | 13 | 11 | 11 | 4 | 12 | 100 | 39 | 13 | 123 | 110 | 358 |
| October | 2009 | 17 | 15 | 14 | 14 | 12 | 10 | 5 | 14 | 100 | 43 | 14 | 125 | 111 | 372 |
| November | 2009 | 17 | 14 | 12 | 13 | 13 | 11 | 5 | 15 | 100 | 43 | 13 | 143 | 130 | 352 |
| December | 2009 | 17 | 16 | 13 | 11 | 13 | 11 | 6 | 14 | 100 | 40 | 14 | 148 | 134 | 362 |
| January | 2010 | 15 | 17 | 14 | 12 | 11 | 14 | 5 | 12 | 100 | 39 | 14 | 140 | 126 | 368 |
| February | 2010 | 12 | 20 | 15 | 15 | 10 | 12 | 5 | 11 | 100 | 38 | 17 | 122 | 106 | 369 |
| March | 2010 | 12 | 18 | 13 | 18 | 11 | 12 | 4 | 12 | 100 | 43 | 16 | 116 | 100 | 370 |
| April | 2010 | 11 | 17 | 15 | 17 | 12 | 10 | 5 | 13 | 100 | 44 | 19 | 121 | 102 | 358 |
| May | 2010 | 11 | 14 | 15 | 16 | 11 | 13 | 5 | 15 | 100 | 50 | 19 | 145 | 127 | 345 |
| June | 2010 | 11 | 14 | 15 | 15 | 12 | 13 | 4 | 16 | 100 | 56 | 19 | 133 | 114 | 342 |
| July | 2010 | 11 | 17 | 12 | 13 | 12 | 14 | 3 | 18 | 100 | 53 | 16 | 141 | 124 | 339 |
| August | 2010 | 13 | 17 | 10 | 14 | 14 | 12 | 4 | 16 | 100 | 53 | 15 | 130 | 115 | 351 |
| September | 2010 | 12 | 18 | 10 | 16 | 14 | 10 | 4 | 15 | 100 | 45 | 15 | 131 | 115 | 338 |
| October | 2010 | 11 | 15 | 10 | 19 | 17 | 11 | 5 | 13 | 100 | 58 | 20 | 146 | 126 | 372 |
| November | 2010 | 9 | 14 | 12 | 19 | 15 | 12 | 5 | 15 | 100 | 59 | 22 | 149 | 127 | 367 |
| December | 2010 | 8 | 14 | 13 | 18 | 16 | 13 | 5 | 13 | 100 | 59 | 23 | 157 | 134 | 366 |
| January | 2011 | 8 | 14 | 15 | 17 | 13 | 15 | 5 | 13 | 100 | 58 | 23 | 169 | 146 | 334 |
| February | 2011 | 10 | 15 | 13 | 16 | 16 | 14 | 7 | 10 | 100 | 61 | 20 | 179 | 159 | 346 |

# INCOME MIDDLE THIRD
# TABLE 21
# CURRENT VALUE OF STOCK MARKET INVESTMENTS
# (Three Month Moving Averages)

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| March | 2011 | 11 | 15 | 11 | 15 | 16 | 14 | 6 | 11 | 100 | 62 | 18 | 166 | 148 | 349 |
| April | 2011 | 13 | 15 | 11 | 15 | 18 | 10 | 7 | 11 | 100 | 59 | 16 | 145 | 129 | 357 |
| May | 2011 | 11 | 15 | 12 | 17 | 15 | 10 | 6 | 14 | 100 | 55 | 18 | 137 | 119 | 342 |
| June | 2011 | 11 | 14 | 13 | 15 | 12 | 13 | 5 | 17 | 100 | 54 | 19 | 166 | 147 | 355 |
| July | 2011 | 11 | 14 | 15 | 15 | 10 | 14 | 5 | 16 | 100 | 50 | 19 | 168 | 149 | 342 |
| August | 2011 | 10 | 16 | 13 | 13 | 13 | 15 | 5 | 14 | 100 | 61 | 18 | 182 | 164 | 341 |
| September | 2011 | 9 | 15 | 12 | 16 | 15 | 14 | 6 | 12 | 100 | 68 | 21 | 172 | 152 | 334 |
| October | 2011 | 10 | 15 | 11 | 15 | 18 | 13 | 7 | 12 | 100 | 69 | 19 | 168 | 149 | 355 |
| November | 2011 | 10 | 14 | 12 | 17 | 18 | 12 | 8 | 11 | 100 | 65 | 22 | 157 | 135 | 362 |
| December | 2011 | 10 | 13 | 13 | 17 | 16 | 13 | 7 | 12 | 100 | 62 | 24 | 166 | 142 | 346 |
| January | 2012 | 8 | 13 | 13 | 18 | 14 | 14 | 5 | 15 | 100 | 63 | 25 | 167 | 142 | 323 |
| February | 2012 | 9 | 13 | 13 | 16 | 14 | 16 | 6 | 14 | 100 | 63 | 23 | 179 | 156 | 338 |
| March | 2012 | 12 | 12 | 15 | 14 | 14 | 15 | 6 | 12 | 100 | 60 | 20 | 171 | 150 | 340 |
| April | 2012 | 12 | 11 | 14 | 15 | 15 | 14 | 7 | 11 | 100 | 63 | 21 | 170 | 148 | 349 |
| May | 2012 | 12 | 11 | 15 | 17 | 14 | 12 | 6 | 12 | 100 | 55 | 22 | 155 | 133 | 326 |
| June | 2012 | 11 | 12 | 12 | 16 | 15 | 13 | 7 | 14 | 100 | 68 | 23 | 178 | 155 | 324 |
| July | 2012 | 10 | 10 | 12 | 15 | 17 | 16 | 6 | 14 | 100 | 81 | 27 | 194 | 168 | 330 |
| August | 2012 | 7 | 7 | 11 | 16 | 18 | 17 | 8 | 15 | 100 | 94 | 36 | 213 | 177 | 331 |
| September | 2012 | 5 | 9 | 11 | 17 | 17 | 17 | 10 | 14 | 100 | 91 | 36 | 222 | 186 | 337 |
| October | 2012 | 8 | 12 | 9 | 19 | 18 | 14 | 10 | 11 | 100 | 81 | 31 | 208 | 178 | 340 |
| November | 2012 | 10 | 12 | 11 | 17 | 16 | 15 | 8 | 11 | 100 | 73 | 23 | 206 | 183 | 336 |
| December | 2012 | 11 | 11 | 11 | 17 | 14 | 15 | 7 | 14 | 100 | 71 | 23 | 184 | 160 | 334 |
| January | 2013 | 9 | 11 | 15 | 16 | 11 | 15 | 7 | 15 | 100 | 66 | 24 | 183 | 159 | 324 |
| February | 2013 | 9 | 11 | 15 | 14 | 13 | 13 | 8 | 18 | 100 | 68 | 24 | 180 | 155 | 312 |
| March | 2013 | 10 | 10 | 16 | 14 | 14 | 11 | 8 | 16 | 100 | 64 | 23 | 179 | 156 | 305 |
| April | 2013 | 11 | 11 | 12 | 15 | 15 | 9 | 8 | 19 | 100 | 63 | 21 | 175 | 154 | 290 |
| May | 2013 | 12 | 13 | 10 | 16 | 13 | 12 | 7 | 17 | 100 | 59 | 19 | 181 | 162 | 307 |
| June | 2013 | 11 | 15 | 8 | 17 | 14 | 11 | 7 | 17 | 100 | 54 | 19 | 171 | 152 | 304 |
| July | 2013 | 10 | 14 | 9 | 17 | 12 | 13 | 8 | 16 | 100 | 58 | 22 | 177 | 155 | 327 |
| August | 2013 | 10 | 13 | 10 | 20 | 15 | 11 | 8 | 13 | 100 | 63 | 23 | 156 | 134 | 315 |
| September | 2013 | 9 | 12 | 10 | 21 | 15 | 11 | 8 | 13 | 100 | 68 | 23 | 154 | 130 | 314 |
| October | 2013 | 9 | 12 | 11 | 18 | 18 | 11 | 9 | 13 | 100 | 78 | 23 | 164 | 141 | 311 |
| November | 2013 | 8 | 13 | 12 | 16 | 15 | 12 | 8 | 16 | 100 | 71 | 22 | 169 | 146 | 326 |
| December | 2013 | 8 | 12 | 13 | 12 | 16 | 13 | 7 | 19 | 100 | 74 | 22 | 179 | 158 | 340 |
| January | 2014 | 9 | 13 | 10 | 15 | 14 | 13 | 7 | 18 | 100 | 69 | 20 | 191 | 171 | 336 |
| February | 2014 | 9 | 12 | 8 | 15 | 16 | 17 | 7 | 16 | 100 | 78 | 23 | 218 | 195 | 342 |
| March | 2014 | 11 | 14 | 7 | 17 | 16 | 17 | 6 | 12 | 100 | 73 | 22 | 200 | 177 | 348 |
| April | 2014 | 13 | 13 | 10 | 16 | 15 | 18 | 4 | 11 | 100 | 62 | 20 | 185 | 165 | 357 |
| May | 2014 | 12 | 15 | 12 | 16 | 13 | 16 | 4 | 12 | 100 | 55 | 17 | 159 | 142 | 363 |
| June | 2014 | 12 | 12 | 14 | 14 | 14 | 15 | 5 | 14 | 100 | 54 | 18 | 170 | 152 | 364 |
| July | 2014 | 13 | 12 | 12 | 13 | 16 | 14 | 6 | 14 | 100 | 59 | 19 | 173 | 154 | 370 |
| August | 2014 | 15 | 12 | 11 | 10 | 16 | 15 | 9 | 12 | 100 | 65 | 17 | 206 | 189 | 354 |
| September | 2014 | 15 | 12 | 10 | 12 | 14 | 17 | 9 | 11 | 100 | 75 | 19 | 227 | 209 | 347 |
| October | 2014 | 12 | 14 | 11 | 13 | 13 | 18 | 8 | 11 | 100 | 69 | 20 | 225 | 205 | 329 |
| November | 2014 | 9 | 12 | 11 | 17 | 14 | 16 | 7 | 14 | 100 | 66 | 24 | 203 | 179 | 326 |
| December | 2014 | 10 | 13 | 10 | 16 | 13 | 14 | 8 | 16 | 100 | 65 | 22 | 194 | 172 | 332 |
| January | 2015 | 12 | 10 | 9 | 16 | 13 | 14 | 10 | 16 | 100 | 73 | 22 | 211 | 188 | 335 |
| February | 2015 | 12 | 10 | 9 | 14 | 15 | 13 | 12 | 15 | 100 | 84 | 25 | 217 | 193 | 340 |
| March | 2015 | 12 | 11 | 9 | 14 | 17 | 13 | 12 | 12 | 100 | 85 | 25 | 216 | 191 | 326 |
| April | 2015 | 11 | 14 | 9 | 12 | 17 | 14 | 9 | 14 | 100 | 77 | 22 | 206 | 183 | 327 |
| May | 2015 | 12 | 15 | 11 | 14 | 13 | 14 | 8 | 13 | 100 | 61 | 17 | 186 | 168 | 328 |
| June | 2015 | 13 | 15 | 11 | 14 | 14 | 16 | 7 | 10 | 100 | 59 | 17 | 185 | 168 | 330 |
| July | 2015 | 12 | 14 | 13 | 16 | 13 | 15 | 7 | 9 | 100 | 60 | 19 | 178 | 159 | 342 |

# INCOME MIDDLE THIRD
# TABLE 21
# CURRENT VALUE OF STOCK MARKET INVESTMENTS
# (Three Month Moving Averages)

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| August | 2015 | 10 | 14 | 12 | 15 | 14 | 17 | 7 | 11 | 100 | 64 | 22 | 203 | 181 | 357 |
| September | 2015 | 10 | 13 | 12 | 16 | 11 | 16 | 7 | 14 | 100 | 62 | 21 | 193 | 172 | 365 |
| October | 2015 | 11 | 13 | 11 | 14 | 11 | 17 | 7 | 16 | 100 | 63 | 19 | 229 | 210 | 357 |
| November | 2015 | 12 | 15 | 12 | 14 | 12 | 14 | 7 | 13 | 100 | 58 | 15 | 202 | 187 | 346 |
| December | 2015 | 12 | 16 | 15 | 13 | 12 | 15 | 6 | 12 | 100 | 51 | 17 | 203 | 187 | 343 |
| January | 2016 | 12 | 16 | 15 | 14 | 13 | 13 | 5 | 11 | 100 | 50 | 18 | 159 | 141 | 329 |
| February | 2016 | 14 | 13 | 17 | 14 | 13 | 13 | 4 | 11 | 100 | 48 | 19 | 147 | 128 | 321 |
| March | 2016 | 16 | 11 | 17 | 12 | 11 | 13 | 7 | 12 | 100 | 48 | 17 | 162 | 146 | 335 |
| April | 2016 | 16 | 10 | 16 | 12 | 12 | 16 | 6 | 12 | 100 | 54 | 15 | 179 | 164 | 351 |
| May | 2016 | 14 | 10 | 12 | 15 | 12 | 18 | 8 | 10 | 100 | 66 | 20 | 212 | 192 | 374 |
| June | 2016 | 11 | 12 | 11 | 17 | 15 | 19 | 8 | 8 | 100 | 74 | 23 | 207 | 184 | 369 |
| July | 2016 | 12 | 13 | 13 | 16 | 14 | 15 | 9 | 8 | 100 | 65 | 22 | 185 | 163 | 367 |
| August | 2016 | 13 | 13 | 12 | 17 | 15 | 13 | 8 | 9 | 100 | 59 | 19 | 156 | 137 | 355 |
| September | 2016 | 14 | 11 | 13 | 18 | 15 | 12 | 8 | 10 | 100 | 55 | 22 | 158 | 137 | 365 |
| October | 2016 | 12 | 10 | 10 | 19 | 16 | 13 | 8 | 11 | 100 | 69 | 24 | 187 | 163 | 362 |
| November | 2016 | 13 | 10 | 9 | 18 | 15 | 16 | 10 | 9 | 100 | 76 | 24 | 213 | 189 | 375 |
| December | 2016 | 12 | 11 | 11 | 16 | 16 | 15 | 10 | 9 | 100 | 78 | 23 | 212 | 189 | 388 |
| January | 2017 | 11 | 11 | 16 | 16 | 15 | 13 | 10 | 9 | 100 | 66 | 23 | 188 | 165 | 402 |
| February | 2017 | 12 | 12 | 15 | 15 | 15 | 12 | 9 | 10 | 100 | 61 | 19 | 175 | 155 | 412 |
| March | 2017 | 12 | 12 | 13 | 15 | 17 | 15 | 9 | 7 | 100 | 69 | 20 | 176 | 155 | 401 |
| April | 2017 | 13 | 13 | 8 | 15 | 17 | 15 | 11 | 8 | 100 | 78 | 20 | 221 | 200 | 413 |
| May | 2017 | 12 | 13 | 9 | 16 | 15 | 13 | 13 | 8 | 100 | 78 | 22 | 230 | 207 | 420 |
| June | 2017 | 13 | 15 | 11 | 13 | 10 | 13 | 13 | 12 | 100 | 64 | 17 | 242 | 225 | 415 |
| July | 2017 | 11 | 14 | 12 | 13 | 12 | 15 | 12 | 11 | 100 | 69 | 20 | 223 | 202 | 400 |
| August | 2017 | 12 | 14 | 11 | 12 | 12 | 17 | 11 | 12 | 100 | 69 | 18 | 233 | 215 | 383 |
| September | 2017 | 10 | 14 | 10 | 15 | 14 | 17 | 10 | 10 | 100 | 73 | 21 | 224 | 203 | 403 |
| October | 2017 | 10 | 12 | 9 | 16 | 13 | 16 | 13 | 10 | 100 | 80 | 22 | 284 | 262 | 430 |
| November | 2017 | 9 | 13 | 8 | 15 | 14 | 16 | 15 | 10 | 100 | 90 | 25 | 308 | 283 | 431 |
| December | 2017 | 11 | 12 | 8 | 14 | 14 | 16 | 15 | 10 | 100 | 90 | 21 | 303 | 281 | 436 |
| January | 2018 | 16 | 14 | 8 | 12 | 13 | 14 | 11 | 11 | 100 | 67 | 15 | 215 | 200 | 425 |
| February | 2018 | 16 | 14 | 8 | 11 | 12 | 16 | 11 | 13 | 100 | 74 | 14 | 223 | 209 | 413 |
| March | 2018 | 14 | 14 | 10 | 10 | 13 | 16 | 10 | 13 | 100 | 76 | 18 | 219 | 202 | 407 |
| April | 2018 | 10 | 16 | 11 | 12 | 11 | 19 | 10 | 11 | 100 | 82 | 21 | 237 | 217 | 390 |
| May | 2018 | 9 | 17 | 12 | 15 | 10 | 19 | 8 | 9 | 100 | 65 | 21 | 220 | 199 | 408 |
| June | 2018 | 9 | 18 | 12 | 16 | 10 | 17 | 9 | 8 | 100 | 62 | 19 | 217 | 198 | 410 |
| July | 2018 | 10 | 15 | 11 | 17 | 12 | 15 | 9 | 11 | 100 | 65 | 19 | 216 | 196 | 418 |
| August | 2018 | 11 | 12 | 10 | 15 | 16 | 12 | 11 | 12 | 100 | 73 | 21 | 204 | 183 | 407 |
| September | 2018 | 13 | 11 | 9 | 15 | 16 | 13 | 11 | 12 | 100 | 76 | 19 | 208 | 189 | 410 |
| October | 2018 | 13 | 9 | 12 | 13 | 16 | 14 | 13 | 10 | 100 | 86 | 22 | 238 | 216 | 427 |
| November | 2018 | 13 | 9 | 13 | 15 | 16 | 15 | 12 | 8 | 100 | 83 | 23 | 231 | 207 | 447 |
| December | 2018 | 10 | 9 | 13 | 17 | 16 | 16 | 11 | 9 | 100 | 83 | 29 | 230 | 201 | 456 |
| January | 2019 | 11 | 10 | 11 | 16 | 16 | 17 | 11 | 9 | 100 | 87 | 28 | 234 | 206 | 463 |
| February | 2019 | 11 | 11 | 10 | 13 | 17 | 17 | 12 | 10 | 100 | 93 | 28 | 247 | 220 | 463 |
| March | 2019 | 13 | 11 | 10 | 11 | 15 | 18 | 13 | 9 | 100 | 93 | 23 | 271 | 248 | 452 |
| April | 2019 | 12 | 12 | 9 | 13 | 15 | 16 | 13 | 10 | 100 | 87 | 21 | 268 | 247 | 433 |
| May | 2019 | 11 | 14 | 9 | 15 | 12 | 18 | 12 | 9 | 100 | 78 | 20 | 265 | 245 | 438 |
| June | 2019 | 10 | 15 | 7 | 14 | 14 | 17 | 11 | 11 | 100 | 82 | 19 | 246 | 226 | 442 |
| July | 2019 | 10 | 14 | 8 | 16 | 14 | 18 | 10 | 10 | 100 | 80 | 21 | 245 | 223 | 458 |
| August | 2019 | 12 | 10 | 9 | 13 | 15 | 18 | 13 | 12 | 100 | 93 | 24 | 279 | 255 | 451 |
| September | 2019 | 11 | 10 | 11 | 11 | 12 | 19 | 15 | 12 | 100 | 97 | 24 | 315 | 291 | 431 |
| October | 2019 | 10 | 11 | 12 | 10 | 14 | 16 | 14 | 12 | 100 | 95 | 23 | 279 | 255 | 429 |
| November | 2019 | 9 | 12 | 13 | 12 | 12 | 16 | 13 | 13 | 100 | 86 | 25 | 261 | 235 | 440 |
| December | 2019 | 10 | 11 | 13 | 13 | 14 | 16 | 13 | 10 | 100 | 81 | 25 | 247 | 222 | 482 |

# INCOME MIDDLE THIRD
# TABLE 21
# CURRENT VALUE OF STOCK MARKET INVESTMENTS
# (Three Month Moving Averages)

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| January | 2020 | 10 | 12 | 11 | 14 | 14 | 18 | 13 | 9 | 100 | 88 | 28 | 263 | 235 | 470 |
| February | 2020 | 11 | 14 | 9 | 13 | 15 | 18 | 12 | 8 | 100 | 87 | 23 | 258 | 235 | 463 |
| March | 2020 | 11 | 13 | 8 | 15 | 13 | 18 | 11 | 11 | 100 | 84 | 21 | 244 | 223 | 437 |
| April | 2020 | 13 | 14 | 8 | 14 | 10 | 17 | 11 | 13 | 100 | 67 | 16 | 239 | 224 | 440 |
| May | 2020 | 13 | 13 | 11 | 14 | 10 | 15 | 10 | 14 | 100 | 63 | 17 | 222 | 205 | 430 |
| June | 2020 | 15 | 13 | 12 | 13 | 10 | 14 | 11 | 11 | 100 | 61 | 16 | 228 | 213 | 442 |
| July | 2020 | 13 | 11 | 11 | 14 | 12 | 14 | 12 | 12 | 100 | 71 | 19 | 256 | 237 | 432 |
| August | 2020 | 13 | 13 | 10 | 14 | 13 | 14 | 14 | 10 | 100 | 74 | 17 | 266 | 249 | 453 |
| September | 2020 | 11 | 13 | 9 | 15 | 14 | 13 | 14 | 11 | 100 | 78 | 21 | 264 | 243 | 443 |
| October | 2020 | 12 | 13 | 10 | 13 | 15 | 14 | 13 | 10 | 100 | 79 | 21 | 234 | 213 | 443 |
| November | 2020 | 11 | 12 | 9 | 14 | 15 | 14 | 13 | 11 | 100 | 81 | 22 | 239 | 217 | 433 |
| December | 2020 | 11 | 12 | 10 | 13 | 15 | 15 | 12 | 11 | 100 | 77 | 21 | 237 | 216 | 433 |
| January | 2021 | 11 | 13 | 9 | 12 | 14 | 18 | 13 | 9 | 100 | 83 | 21 | 271 | 250 | 438 |
| February | 2021 | 12 | 12 | 11 | 11 | 15 | 18 | 12 | 10 | 100 | 83 | 23 | 253 | 230 | 430 |
| March | 2021 | 11 | 11 | 12 | 13 | 15 | 17 | 12 | 10 | 100 | 84 | 25 | 238 | 212 | 415 |
| April | 2021 | 11 | 10 | 12 | 15 | 14 | 15 | 12 | 11 | 100 | 79 | 25 | 241 | 215 | 416 |
| May | 2021 | 13 | 9 | 11 | 14 | 11 | 16 | 14 | 12 | 100 | 83 | 23 | 289 | 266 | 423 |
| June | 2021 | 13 | 11 | 10 | 10 | 10 | 16 | 16 | 13 | 100 | 90 | 20 | 339 | 318 | 426 |
| July | 2021 | 14 | 11 | 10 | 9 | 12 | 18 | 14 | 13 | 100 | 90 | 20 | 320 | 300 | 429 |
| August | 2021 | 10 | 12 | 9 | 11 | 14 | 17 | 12 | 14 | 100 | 93 | 27 | 286 | 259 | 432 |
| September | 2021 | 10 | 10 | 10 | 14 | 14 | 17 | 10 | 15 | 100 | 88 | 29 | 257 | 228 | 464 |
| October | 2021 | 10 | 10 | 9 | 17 | 14 | 16 | 11 | 14 | 100 | 84 | 31 | 259 | 229 | 468 |
| November | 2021 | 10 | 11 | 10 | 16 | 14 | 15 | 12 | 12 | 100 | 82 | 26 | 247 | 221 | 467 |
| December | 2021 | 10 | 12 | 9 | 14 | 14 | 16 | 14 | 11 | 100 | 88 | 25 | 263 | 238 | 447 |
| January | 2022 | 9 | 12 | 10 | 11 | 14 | 16 | 15 | 13 | 100 | 96 | 25 | 282 | 258 | 464 |
| February | 2022 | 10 | 12 | 10 | 10 | 13 | 16 | 14 | 15 | 100 | 95 | 23 | 287 | 263 | 450 |
| March | 2022 | 7 | 11 | 12 | 10 | 15 | 15 | 14 | 16 | 100 | 94 | 26 | 288 | 262 | 450 |