

INCOME TOP 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 | | | Cases |
|----------------|------|-------------|----------------|----------------|----------------|------------------|------------------|---------------|--------|-------|---------------|-------------|------|-----|-------|
| | | | | | | | | | | | | 25th | 75th | Rng | |
| March | 1990 | 20 | 20 | 15 | 14 | 10 | 5 | 2 | 15 | 100 | 29 | 11 | 74 | 63 | 552 |
| April | 1990 | 20 | 17 | 13 | 14 | 12 | 6 | 2 | 15 | 100 | 31 | 11 | 83 | 73 | 559 |
| September | 1997 | 9 | 13 | 12 | 20 | 17 | 10 | 7 | 13 | 100 | 71 | 26 | 161 | 136 | 350 |
| February | 1998 | 7 | 9 | 14 | 14 | 17 | 13 | 7 | 19 | 100 | 85 | 34 | 184 | 149 | 352 |
| November | 1998 | 7 | 11 | 10 | 20 | 16 | 13 | 9 | 15 | 100 | 74 | 35 | 200 | 165 | 388 |
| December | 1998 | 7 | 11 | 12 | 19 | 15 | 13 | 8 | 15 | 100 | 68 | 32 | 180 | 149 | 402 |
| January | 1999 | 7 | 9 | 13 | 19 | 16 | 15 | 8 | 12 | 100 | 80 | 36 | 209 | 173 | 417 |
| February | 1999 | 7 | 9 | 15 | 15 | 15 | 16 | 8 | 14 | 100 | 79 | 31 | 217 | 185 | 415 |
| March | 1999 | 6 | 10 | 14 | 14 | 16 | 16 | 8 | 16 | 100 | 78 | 32 | 215 | 183 | 386 |
| April | 1999 | 6 | 11 | 14 | 12 | 16 | 14 | 8 | 19 | 100 | 78 | 30 | 198 | 168 | 353 |
| May | 1999 | 5 | 9 | 12 | 14 | 19 | 13 | 10 | 18 | 100 | 87 | 35 | 207 | 172 | 363 |
| June | 1999 | 6 | 8 | 11 | 15 | 19 | 13 | 11 | 17 | 100 | 98 | 39 | 222 | 183 | 378 |
| July | 1999 | 8 | 7 | 10 | 17 | 17 | 15 | 14 | 13 | 100 | 99 | 38 | 243 | 205 | 401 |
| August | 1999 | 10 | 9 | 11 | 15 | 15 | 16 | 11 | 15 | 100 | 86 | 32 | 222 | 190 | 392 |
| September | 1999 | 8 | 9 | 11 | 14 | 14 | 19 | 10 | 15 | 100 | 89 | 32 | 237 | 204 | 399 |
| October | 1999 | 6 | 9 | 11 | 16 | 14 | 20 | 9 | 15 | 100 | 89 | 37 | 244 | 207 | 394 |
| November | 1999 | 5 | 8 | 10 | 16 | 15 | 21 | 12 | 13 | 100 | 102 | 40 | 290 | 250 | 392 |
| December | 1999 | 4 | 7 | 11 | 15 | 18 | 18 | 15 | 11 | 100 | 113 | 45 | 312 | 266 | 376 |
| January | 2000 | 5 | 8 | 11 | 12 | 18 | 20 | 14 | 12 | 100 | 116 | 41 | 308 | 267 | 373 |
| February | 2000 | 5 | 9 | 12 | 12 | 18 | 18 | 12 | 15 | 100 | 113 | 38 | 277 | 239 | 388 |
| March | 2000 | 5 | 11 | 11 | 12 | 16 | 20 | 10 | 16 | 100 | 101 | 35 | 252 | 217 | 401 |
| April | 2000 | 3 | 8 | 11 | 14 | 17 | 18 | 11 | 17 | 100 | 106 | 43 | 260 | 218 | 410 |
| May | 2000 | 3 | 9 | 10 | 13 | 17 | 18 | 12 | 19 | 100 | 109 | 41 | 279 | 238 | 414 |
| June | 2000 | 4 | 9 | 9 | 13 | 15 | 19 | 12 | 19 | 100 | 127 | 43 | 296 | 254 | 421 |
| July | 2000 | 4 | 9 | 10 | 12 | 14 | 17 | 11 | 24 | 100 | 121 | 39 | 269 | 230 | 402 |
| August | 2000 | 4 | 6 | 11 | 13 | 17 | 17 | 12 | 19 | 100 | 126 | 45 | 258 | 214 | 399 |
| September | 2000 | 5 | 5 | 10 | 13 | 18 | 15 | 13 | 20 | 100 | 110 | 46 | 263 | 217 | 377 |
| October | 2000 | 7 | 7 | 8 | 13 | 17 | 17 | 13 | 19 | 100 | 109 | 41 | 269 | 227 | 381 |
| November | 2000 | 6 | 9 | 7 | 13 | 17 | 18 | 9 | 20 | 100 | 103 | 37 | 262 | 224 | 377 |
| December | 2000 | 4 | 12 | 7 | 13 | 17 | 19 | 10 | 18 | 100 | 112 | 36 | 252 | 216 | 367 |
| January | 2001 | 4 | 11 | 8 | 16 | 17 | 18 | 11 | 16 | 100 | 107 | 40 | 266 | 226 | 367 |
| February | 2001 | 4 | 11 | 6 | 16 | 16 | 16 | 14 | 16 | 100 | 121 | 45 | 276 | 230 | 363 |
| March | 2001 | 5 | 8 | 9 | 15 | 18 | 17 | 13 | 15 | 100 | 116 | 43 | 250 | 207 | 394 |
| April | 2001 | 4 | 9 | 10 | 14 | 18 | 17 | 13 | 16 | 100 | 118 | 43 | 239 | 196 | 413 |
| May | 2001 | 3 | 7 | 12 | 14 | 17 | 17 | 11 | 18 | 100 | 102 | 41 | 233 | 192 | 435 |
| June | 2001 | 3 | 9 | 12 | 13 | 15 | 16 | 12 | 20 | 100 | 96 | 39 | 239 | 200 | 427 |
| July | 2001 | 3 | 9 | 11 | 13 | 14 | 15 | 12 | 22 | 100 | 98 | 38 | 256 | 218 | 403 |
| August | 2001 | 4 | 10 | 10 | 15 | 12 | 15 | 11 | 23 | 100 | 92 | 36 | 268 | 232 | 380 |
| September | 2001 | 4 | 8 | 11 | 16 | 12 | 16 | 10 | 24 | 100 | 91 | 38 | 264 | 226 | 366 |
| October | 2001 | 5 | 8 | 10 | 16 | 13 | 16 | 10 | 22 | 100 | 89 | 38 | 251 | 213 | 364 |
| November | 2001 | 5 | 7 | 9 | 15 | 15 | 17 | 10 | 22 | 100 | 102 | 43 | 253 | 210 | 363 |
| December | 2001 | 4 | 10 | 8 | 16 | 15 | 15 | 10 | 22 | 100 | 95 | 40 | 244 | 204 | 374 |

INCOME TOP THIRD

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

| <u>Date of Survey</u> | | <u>Under</u> | <u>\$10k</u> | <u>\$25k</u> | <u>\$50k</u> | <u>\$100k</u> | <u>\$200k</u> | <u>\$500k</u> | | | <u>Median</u> | <u>Percentiles</u> | | | |
|-----------------------|------|--------------|-----------------|-----------------|-----------------|------------------|------------------|---------------|---------------|--------------|---------------|--------------------|-------------|------------|--------------|
| | | <u>\$10k</u> | <u>to \$24k</u> | <u>to \$49k</u> | <u>to \$99k</u> | <u>to \$199k</u> | <u>to \$499k</u> | <u>and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>1000's</u> | <u>25th</u> | <u>75th</u> | <u>Rng</u> | <u>Cases</u> |
| January | 2002 | 3 | 11 | 9 | 15 | 16 | 14 | 12 | 20 | 100 | 99 | 40 | 245 | 205 | 386 |
| February | 2002 | 3 | 12 | 11 | 14 | 16 | 13 | 12 | 19 | 100 | 91 | 35 | 218 | 183 | 392 |
| March | 2002 | 4 | 11 | 12 | 13 | 17 | 15 | 11 | 17 | 100 | 96 | 34 | 221 | 187 | 401 |
| April | 2002 | 4 | 9 | 12 | 11 | 19 | 16 | 9 | 19 | 100 | 112 | 37 | 223 | 186 | 401 |
| May | 2002 | 4 | 9 | 13 | 13 | 19 | 17 | 9 | 15 | 100 | 109 | 37 | 220 | 183 | 387 |
| June | 2002 | 4 | 8 | 13 | 15 | 16 | 17 | 11 | 16 | 100 | 104 | 40 | 245 | 205 | 390 |
| July | 2002 | 5 | 9 | 14 | 17 | 16 | 15 | 11 | 13 | 100 | 82 | 34 | 213 | 179 | 399 |
| August | 2002 | 5 | 10 | 14 | 16 | 15 | 14 | 10 | 15 | 100 | 78 | 33 | 210 | 177 | 420 |
| September | 2002 | 6 | 10 | 13 | 18 | 17 | 15 | 7 | 14 | 100 | 76 | 33 | 185 | 153 | 433 |
| October | 2002 | 6 | 8 | 13 | 17 | 14 | 18 | 8 | 16 | 100 | 82 | 37 | 215 | 177 | 429 |
| November | 2002 | 6 | 9 | 11 | 15 | 15 | 19 | 10 | 15 | 100 | 92 | 37 | 239 | 201 | 420 |
| December | 2002 | 4 | 8 | 13 | 16 | 15 | 17 | 11 | 16 | 100 | 93 | 39 | 241 | 202 | 401 |
| January | 2003 | 4 | 10 | 12 | 17 | 19 | 15 | 10 | 14 | 100 | 92 | 39 | 219 | 180 | 397 |
| February | 2003 | 5 | 10 | 11 | 18 | 18 | 15 | 9 | 14 | 100 | 83 | 37 | 209 | 172 | 385 |
| March | 2003 | 4 | 11 | 10 | 17 | 18 | 17 | 10 | 13 | 100 | 90 | 39 | 220 | 181 | 393 |
| April | 2003 | 6 | 11 | 12 | 16 | 16 | 16 | 10 | 14 | 100 | 80 | 34 | 213 | 178 | 414 |
| August | 2003 | 6 | 12 | 14 | 16 | 14 | 16 | 8 | 13 | 100 | 70 | 27 | 185 | 158 | 437 |
| September | 2003 | 6 | 11 | 14 | 15 | 14 | 16 | 10 | 14 | 100 | 79 | 30 | 211 | 181 | 424 |
| October | 2003 | 7 | 12 | 13 | 15 | 14 | 17 | 8 | 14 | 100 | 79 | 29 | 213 | 184 | 416 |
| November | 2003 | 6 | 11 | 13 | 16 | 15 | 16 | 11 | 13 | 100 | 84 | 31 | 222 | 191 | 447 |
| December | 2003 | 6 | 11 | 12 | 17 | 15 | 15 | 10 | 15 | 100 | 80 | 33 | 216 | 183 | 463 |
| January | 2004 | 6 | 11 | 13 | 16 | 13 | 16 | 11 | 14 | 100 | 80 | 33 | 237 | 204 | 476 |
| February | 2004 | 6 | 10 | 12 | 16 | 13 | 19 | 9 | 16 | 100 | 87 | 36 | 248 | 213 | 453 |
| March | 2004 | 6 | 10 | 10 | 17 | 13 | 20 | 9 | 15 | 100 | 89 | 36 | 261 | 225 | 449 |
| April | 2004 | 7 | 10 | 9 | 18 | 15 | 18 | 8 | 15 | 100 | 89 | 35 | 236 | 201 | 439 |
| May | 2004 | 7 | 8 | 9 | 19 | 16 | 16 | 10 | 14 | 100 | 89 | 40 | 249 | 210 | 453 |
| June | 2004 | 5 | 9 | 9 | 18 | 17 | 18 | 12 | 12 | 100 | 110 | 44 | 277 | 233 | 453 |
| July | 2004 | 5 | 8 | 9 | 18 | 15 | 19 | 13 | 12 | 100 | 112 | 45 | 281 | 236 | 463 |
| August | 2004 | 6 | 9 | 10 | 19 | 15 | 18 | 12 | 12 | 100 | 105 | 41 | 254 | 213 | 460 |
| September | 2004 | 6 | 10 | 10 | 18 | 18 | 16 | 10 | 12 | 100 | 90 | 37 | 209 | 173 | 470 |
| October | 2004 | 7 | 10 | 10 | 19 | 18 | 16 | 11 | 10 | 100 | 90 | 35 | 212 | 176 | 456 |
| November | 2004 | 5 | 11 | 10 | 17 | 19 | 18 | 11 | 9 | 100 | 97 | 38 | 239 | 200 | 455 |
| December | 2004 | 4 | 11 | 11 | 17 | 16 | 20 | 11 | 10 | 100 | 98 | 38 | 259 | 221 | 470 |
| January | 2005 | 4 | 11 | 11 | 16 | 17 | 20 | 11 | 11 | 100 | 96 | 38 | 260 | 222 | 481 |
| February | 2005 | 4 | 10 | 12 | 18 | 18 | 17 | 10 | 10 | 100 | 90 | 38 | 226 | 188 | 486 |
| March | 2005 | 6 | 10 | 11 | 19 | 18 | 14 | 10 | 12 | 100 | 78 | 33 | 196 | 164 | 472 |
| April | 2005 | 6 | 10 | 10 | 19 | 18 | 17 | 9 | 12 | 100 | 86 | 37 | 207 | 171 | 467 |
| May | 2005 | 5 | 11 | 12 | 17 | 16 | 17 | 9 | 12 | 100 | 83 | 32 | 202 | 170 | 466 |
| June | 2005 | 4 | 10 | 13 | 15 | 19 | 19 | 9 | 11 | 100 | 94 | 40 | 240 | 200 | 471 |
| July | 2005 | 4 | 10 | 13 | 14 | 19 | 18 | 10 | 12 | 100 | 93 | 39 | 253 | 214 | 478 |
| August | 2005 | 6 | 9 | 9 | 13 | 18 | 20 | 12 | 13 | 100 | 109 | 42 | 295 | 253 | 491 |
| September | 2005 | 7 | 8 | 11 | 13 | 17 | 20 | 13 | 12 | 100 | 108 | 40 | 293 | 253 | 492 |
| October | 2005 | 7 | 7 | 11 | 13 | 19 | 20 | 13 | 11 | 100 | 110 | 43 | 277 | 234 | 500 |
| November | 2005 | 6 | 8 | 13 | 14 | 20 | 19 | 10 | 11 | 100 | 96 | 41 | 242 | 201 | 475 |
| December | 2005 | 5 | 9 | 10 | 14 | 19 | 18 | 10 | 15 | 100 | 104 | 44 | 247 | 204 | 457 |
| January | 2006 | 5 | 9 | 10 | 17 | 18 | 17 | 9 | 15 | 100 | 99 | 41 | 237 | 196 | 462 |
| February | 2006 | 6 | 9 | 8 | 14 | 17 | 18 | 13 | 15 | 100 | 113 | 43 | 291 | 248 | 481 |
| March | 2006 | 5 | 7 | 10 | 16 | 17 | 20 | 14 | 11 | 100 | 110 | 44 | 287 | 243 | 488 |
| April | 2006 | 6 | 6 | 12 | 13 | 18 | 19 | 14 | 13 | 100 | 111 | 42 | 284 | 242 | 486 |

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CURRENT VALUE OF STOCK MARKET INVESTMENTS
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| <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> |
| May | 2006 | 5 | 7 | 12 | 15 | 19 | 19 | 10 | 13 | 100 | 105 | 39 | 238 | 198 | 480 |
| June | 2006 | 5 | 8 | 11 | 14 | 19 | 20 | 9 | 14 | 100 | 108 | 40 | 226 | 186 | 477 |
| July | 2006 | 3 | 9 | 10 | 17 | 17 | 19 | 11 | 14 | 100 | 108 | 43 | 244 | 200 | 474 |
| August | 2006 | 2 | 7 | 9 | 18 | 17 | 19 | 14 | 13 | 100 | 123 | 55 | 273 | 218 | 470 |
| September | 2006 | 3 | 7 | 9 | 18 | 16 | 19 | 15 | 14 | 100 | 125 | 54 | 302 | 248 | 463 |
| October | 2006 | 3 | 6 | 8 | 14 | 17 | 22 | 15 | 15 | 100 | 145 | 57 | 327 | 271 | 454 |
| November | 2006 | 3 | 7 | 9 | 17 | 16 | 20 | 16 | 13 | 100 | 131 | 50 | 334 | 284 | 443 |
| December | 2006 | 2 | 5 | 9 | 16 | 17 | 21 | 17 | 14 | 100 | 138 | 52 | 320 | 268 | 441 |
| January | 2007 | 2 | 7 | 9 | 17 | 17 | 20 | 17 | 11 | 100 | 122 | 49 | 304 | 255 | 460 |
| February | 2007 | 2 | 7 | 9 | 16 | 19 | 20 | 16 | 11 | 100 | 121 | 51 | 293 | 241 | 460 |
| March | 2007 | 3 | 9 | 10 | 14 | 19 | 19 | 15 | 11 | 100 | 110 | 47 | 293 | 246 | 484 |
| April | 2007 | 3 | 8 | 10 | 12 | 19 | 20 | 16 | 12 | 100 | 126 | 49 | 315 | 266 | 495 |
| May | 2007 | 4 | 8 | 9 | 12 | 16 | 22 | 18 | 12 | 100 | 145 | 47 | 371 | 324 | 503 |
| June | 2007 | 4 | 7 | 8 | 14 | 16 | 21 | 19 | 10 | 100 | 152 | 53 | 375 | 322 | 490 |
| July | 2007 | 3 | 5 | 10 | 16 | 15 | 23 | 18 | 11 | 100 | 160 | 53 | 363 | 310 | 453 |
| August | 2007 | 3 | 6 | 9 | 13 | 17 | 24 | 15 | 12 | 100 | 149 | 49 | 316 | 267 | 455 |
| September | 2007 | 3 | 6 | 11 | 12 | 15 | 26 | 13 | 14 | 100 | 150 | 46 | 309 | 264 | 446 |
| October | 2007 | 4 | 7 | 9 | 12 | 15 | 23 | 17 | 12 | 100 | 142 | 46 | 360 | 314 | 463 |
| November | 2007 | 4 | 7 | 9 | 14 | 15 | 21 | 18 | 12 | 100 | 141 | 50 | 359 | 309 | 465 |
| December | 2007 | 5 | 8 | 7 | 14 | 17 | 19 | 19 | 11 | 100 | 135 | 49 | 381 | 332 | 472 |
| January | 2008 | 4 | 7 | 7 | 17 | 17 | 19 | 16 | 14 | 100 | 120 | 50 | 344 | 293 | 452 |
| February | 2008 | 5 | 5 | 9 | 15 | 15 | 22 | 15 | 14 | 100 | 129 | 49 | 374 | 325 | 457 |
| March | 2008 | 3 | 4 | 10 | 16 | 15 | 21 | 15 | 14 | 100 | 128 | 52 | 369 | 317 | 452 |
| April | 2008 | 4 | 4 | 11 | 16 | 16 | 20 | 16 | 13 | 100 | 128 | 49 | 349 | 299 | 471 |
| May | 2008 | 4 | 4 | 8 | 17 | 19 | 19 | 15 | 13 | 100 | 126 | 55 | 307 | 253 | 467 |
| June | 2008 | 5 | 5 | 7 | 17 | 18 | 20 | 14 | 14 | 100 | 127 | 54 | 294 | 239 | 483 |
| July | 2008 | 5 | 6 | 10 | 16 | 17 | 21 | 14 | 12 | 100 | 123 | 49 | 282 | 233 | 460 |
| August | 2008 | 4 | 5 | 11 | 15 | 15 | 24 | 15 | 10 | 100 | 142 | 54 | 312 | 258 | 452 |
| September | 2008 | 4 | 6 | 11 | 14 | 17 | 24 | 17 | 7 | 100 | 150 | 55 | 334 | 280 | 439 |
| October | 2008 | 3 | 5 | 10 | 13 | 18 | 24 | 18 | 8 | 100 | 156 | 58 | 342 | 284 | 455 |
| November | 2008 | 5 | 5 | 11 | 15 | 19 | 20 | 17 | 9 | 100 | 137 | 50 | 331 | 280 | 458 |
| December | 2008 | 5 | 6 | 10 | 15 | 17 | 19 | 15 | 12 | 100 | 133 | 48 | 317 | 269 | 461 |
| January | 2009 | 5 | 7 | 10 | 17 | 16 | 18 | 15 | 13 | 100 | 123 | 44 | 297 | 253 | 467 |
| February | 2009 | 5 | 9 | 10 | 17 | 13 | 18 | 13 | 14 | 100 | 108 | 39 | 286 | 247 | 491 |
| March | 2009 | 6 | 8 | 12 | 16 | 16 | 17 | 12 | 14 | 100 | 93 | 37 | 242 | 205 | 497 |
| April | 2009 | 5 | 8 | 12 | 14 | 18 | 17 | 13 | 13 | 100 | 99 | 38 | 268 | 230 | 502 |
| May | 2009 | 4 | 9 | 11 | 14 | 20 | 17 | 14 | 11 | 100 | 103 | 42 | 256 | 215 | 476 |
| June | 2009 | 4 | 10 | 11 | 14 | 19 | 17 | 16 | 10 | 100 | 105 | 42 | 302 | 260 | 486 |
| July | 2009 | 5 | 9 | 10 | 15 | 17 | 19 | 15 | 10 | 100 | 113 | 45 | 299 | 255 | 480 |
| August | 2009 | 4 | 8 | 11 | 16 | 15 | 18 | 17 | 11 | 100 | 120 | 45 | 346 | 301 | 474 |
| September | 2009 | 3 | 6 | 10 | 17 | 16 | 19 | 17 | 12 | 100 | 134 | 52 | 341 | 289 | 458 |
| October | 2009 | 1 | 6 | 10 | 15 | 18 | 20 | 19 | 11 | 100 | 155 | 59 | 353 | 295 | 455 |
| November | 2009 | 2 | 7 | 10 | 13 | 17 | 23 | 18 | 11 | 100 | 160 | 60 | 349 | 289 | 463 |
| December | 2009 | 3 | 7 | 7 | 15 | 18 | 23 | 17 | 10 | 100 | 150 | 62 | 338 | 276 | 448 |
| January | 2010 | 5 | 8 | 8 | 14 | 16 | 21 | 17 | 11 | 100 | 132 | 53 | 366 | 313 | 433 |
| February | 2010 | 5 | 6 | 9 | 15 | 17 | 21 | 16 | 10 | 100 | 119 | 51 | 335 | 284 | 430 |
| March | 2010 | 5 | 5 | 10 | 14 | 15 | 23 | 17 | 11 | 100 | 139 | 54 | 345 | 292 | 423 |
| April | 2010 | 3 | 4 | 8 | 16 | 17 | 25 | 16 | 11 | 100 | 158 | 69 | 337 | 268 | 442 |
| May | 2010 | 3 | 4 | 6 | 16 | 20 | 23 | 16 | 12 | 100 | 158 | 73 | 321 | 248 | 449 |
| June | 2010 | 2 | 6 | 8 | 15 | 22 | 20 | 16 | 12 | 100 | 143 | 64 | 321 | 257 | 466 |

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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 | 2 | 6 | 8 | 14 | 22 | 17 | 17 | 13 | 100 | 129 | 56 | 327 | 270 | 451 |
| August | 2010 | 2 | 7 | 9 | 13 | 19 | 20 | 18 | 12 | 100 | 144 | 53 | 368 | 315 | 441 |
| September | 2010 | 3 | 8 | 8 | 12 | 17 | 23 | 17 | 12 | 100 | 152 | 55 | 357 | 302 | 428 |
| October | 2010 | 2 | 9 | 7 | 14 | 15 | 25 | 18 | 10 | 100 | 159 | 60 | 367 | 308 | 428 |
| November | 2010 | 3 | 8 | 6 | 14 | 18 | 22 | 19 | 10 | 100 | 159 | 65 | 376 | 311 | 447 |
| December | 2010 | 2 | 7 | 7 | 13 | 18 | 21 | 20 | 12 | 100 | 168 | 62 | 386 | 324 | 466 |
| January | 2011 | 3 | 5 | 9 | 11 | 19 | 20 | 19 | 13 | 100 | 158 | 55 | 361 | 305 | 468 |
| February | 2011 | 3 | 5 | 9 | 14 | 15 | 22 | 18 | 14 | 100 | 160 | 54 | 332 | 278 | 445 |
| March | 2011 | 3 | 6 | 7 | 15 | 16 | 24 | 17 | 13 | 100 | 164 | 61 | 346 | 285 | 425 |
| April | 2011 | 3 | 7 | 5 | 16 | 14 | 25 | 17 | 13 | 100 | 180 | 64 | 362 | 298 | 438 |
| May | 2011 | 3 | 8 | 6 | 11 | 16 | 26 | 17 | 12 | 100 | 178 | 63 | 375 | 312 | 447 |
| June | 2011 | 3 | 8 | 7 | 11 | 16 | 23 | 19 | 12 | 100 | 174 | 57 | 406 | 349 | 461 |
| July | 2011 | 3 | 8 | 8 | 9 | 17 | 22 | 21 | 12 | 100 | 177 | 63 | 452 | 389 | 424 |
| August | 2011 | 3 | 6 | 7 | 12 | 17 | 21 | 22 | 12 | 100 | 175 | 68 | 448 | 381 | 415 |
| September | 2011 | 2 | 6 | 7 | 12 | 17 | 22 | 21 | 14 | 100 | 182 | 74 | 442 | 368 | 412 |
| October | 2011 | 2 | 4 | 8 | 14 | 17 | 21 | 18 | 16 | 100 | 165 | 65 | 382 | 317 | 438 |
| November | 2011 | 2 | 5 | 9 | 10 | 18 | 21 | 18 | 17 | 100 | 169 | 58 | 391 | 333 | 432 |
| December | 2011 | 2 | 5 | 10 | 11 | 18 | 20 | 17 | 16 | 100 | 154 | 53 | 352 | 298 | 444 |
| January | 2012 | 2 | 6 | 10 | 12 | 16 | 22 | 17 | 16 | 100 | 157 | 54 | 348 | 294 | 447 |
| February | 2012 | 3 | 5 | 10 | 16 | 13 | 18 | 18 | 17 | 100 | 137 | 53 | 362 | 309 | 445 |
| March | 2012 | 3 | 5 | 10 | 15 | 14 | 19 | 18 | 16 | 100 | 137 | 56 | 379 | 323 | 435 |
| April | 2012 | 3 | 5 | 10 | 16 | 16 | 19 | 17 | 14 | 100 | 124 | 57 | 373 | 315 | 430 |
| May | 2012 | 3 | 6 | 8 | 13 | 18 | 23 | 18 | 11 | 100 | 156 | 66 | 374 | 309 | 458 |
| June | 2012 | 3 | 7 | 7 | 13 | 19 | 23 | 19 | 9 | 100 | 157 | 64 | 385 | 321 | 452 |
| July | 2012 | 3 | 7 | 7 | 11 | 19 | 23 | 21 | 10 | 100 | 172 | 71 | 419 | 348 | 458 |
| August | 2012 | 2 | 6 | 6 | 13 | 18 | 20 | 21 | 13 | 100 | 171 | 69 | 446 | 377 | 446 |
| September | 2012 | 1 | 5 | 6 | 14 | 17 | 22 | 22 | 14 | 100 | 185 | 81 | 465 | 383 | 441 |
| October | 2012 | 1 | 5 | 6 | 16 | 15 | 22 | 24 | 12 | 100 | 194 | 79 | 486 | 407 | 428 |
| November | 2012 | 2 | 5 | 6 | 17 | 15 | 22 | 23 | 11 | 100 | 182 | 75 | 454 | 379 | 420 |
| December | 2012 | 2 | 7 | 6 | 16 | 13 | 22 | 22 | 11 | 100 | 184 | 67 | 439 | 373 | 426 |
| January | 2013 | 2 | 6 | 5 | 16 | 17 | 22 | 20 | 12 | 100 | 169 | 68 | 415 | 347 | 434 |
| February | 2013 | 2 | 7 | 6 | 14 | 16 | 25 | 20 | 11 | 100 | 178 | 69 | 421 | 352 | 449 |
| March | 2013 | 3 | 6 | 5 | 14 | 16 | 24 | 21 | 11 | 100 | 178 | 70 | 433 | 363 | 445 |
| April | 2013 | 3 | 6 | 6 | 15 | 13 | 25 | 21 | 12 | 100 | 193 | 65 | 445 | 380 | 450 |
| May | 2013 | 3 | 5 | 6 | 14 | 15 | 23 | 23 | 11 | 100 | 189 | 70 | 489 | 419 | 438 |
| June | 2013 | 3 | 5 | 7 | 13 | 17 | 22 | 23 | 10 | 100 | 175 | 65 | 495 | 429 | 436 |
| July | 2013 | 4 | 5 | 7 | 13 | 21 | 20 | 23 | 8 | 100 | 160 | 72 | 458 | 385 | 443 |
| August | 2013 | 2 | 5 | 6 | 14 | 19 | 21 | 24 | 9 | 100 | 184 | 68 | 446 | 378 | 451 |
| September | 2013 | 1 | 5 | 6 | 16 | 15 | 22 | 24 | 10 | 100 | 197 | 67 | 456 | 388 | 480 |
| October | 2013 | 1 | 6 | 5 | 15 | 10 | 23 | 26 | 13 | 100 | 227 | 63 | 510 | 447 | 467 |
| November | 2013 | 2 | 6 | 4 | 13 | 11 | 23 | 26 | 16 | 100 | 230 | 76 | 572 | 495 | 461 |
| December | 2013 | 2 | 4 | 3 | 13 | 13 | 23 | 27 | 15 | 100 | 236 | 80 | 571 | 492 | 459 |
| January | 2014 | 2 | 4 | 4 | 12 | 15 | 23 | 27 | 12 | 100 | 223 | 86 | 569 | 483 | 472 |
| February | 2014 | 2 | 5 | 4 | 12 | 14 | 24 | 28 | 11 | 100 | 228 | 84 | 509 | 425 | 475 |
| March | 2014 | 2 | 6 | 6 | 10 | 15 | 20 | 29 | 13 | 100 | 212 | 79 | 543 | 464 | 472 |
| April | 2014 | 2 | 4 | 7 | 9 | 13 | 21 | 29 | 15 | 100 | 234 | 85 | 561 | 475 | 460 |
| May | 2014 | 3 | 4 | 8 | 9 | 14 | 21 | 26 | 16 | 100 | 217 | 77 | 559 | 482 | 462 |
| June | 2014 | 3 | 4 | 7 | 9 | 13 | 22 | 27 | 14 | 100 | 228 | 81 | 532 | 451 | 461 |
| July | 2014 | 4 | 4 | 7 | 11 | 12 | 21 | 27 | 14 | 100 | 219 | 69 | 513 | 444 | 478 |
| August | 2014 | 3 | 3 | 7 | 11 | 12 | 23 | 27 | 13 | 100 | 238 | 78 | 509 | 431 | 479 |

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**TABLE 21
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| <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 | 3 | 4 | 6 | 11 | 13 | 24 | 27 | 13 | 100 | 238 | 80 | 530 | 449 | 482 |
| October | 2014 | 2 | 3 | 7 | 10 | 15 | 24 | 26 | 12 | 100 | 230 | 83 | 528 | 445 | 473 |
| November | 2014 | 3 | 2 | 6 | 11 | 15 | 23 | 25 | 14 | 100 | 222 | 84 | 515 | 432 | 488 |
| December | 2014 | 4 | 2 | 7 | 9 | 15 | 24 | 23 | 16 | 100 | 226 | 86 | 495 | 410 | 490 |
| January | 2015 | 4 | 4 | 6 | 10 | 14 | 23 | 23 | 16 | 100 | 218 | 85 | 499 | 414 | 506 |
| February | 2015 | 3 | 6 | 7 | 11 | 13 | 20 | 26 | 13 | 100 | 212 | 69 | 516 | 446 | 495 |
| March | 2015 | 3 | 6 | 8 | 13 | 11 | 21 | 27 | 12 | 100 | 220 | 63 | 517 | 454 | 489 |
| April | 2015 | 3 | 5 | 7 | 11 | 14 | 22 | 26 | 11 | 100 | 224 | 71 | 512 | 441 | 480 |
| May | 2015 | 2 | 5 | 7 | 11 | 17 | 24 | 24 | 10 | 100 | 210 | 77 | 493 | 417 | 472 |
| June | 2015 | 3 | 6 | 6 | 9 | 17 | 24 | 24 | 10 | 100 | 208 | 77 | 490 | 413 | 484 |
| July | 2015 | 2 | 6 | 7 | 11 | 16 | 21 | 26 | 10 | 100 | 205 | 68 | 511 | 443 | 481 |
| August | 2015 | 2 | 6 | 7 | 10 | 15 | 20 | 29 | 11 | 100 | 224 | 81 | 555 | 474 | 515 |
| September | 2015 | 1 | 6 | 6 | 12 | 17 | 21 | 28 | 10 | 100 | 215 | 86 | 523 | 437 | 504 |
| October | 2015 | 2 | 4 | 5 | 9 | 16 | 26 | 27 | 11 | 100 | 236 | 104 | 537 | 433 | 521 |
| November | 2015 | 2 | 5 | 5 | 10 | 15 | 26 | 27 | 10 | 100 | 235 | 99 | 512 | 414 | 495 |
| December | 2015 | 2 | 5 | 6 | 7 | 15 | 25 | 28 | 12 | 100 | 246 | 104 | 566 | 463 | 486 |
| January | 2016 | 3 | 6 | 6 | 10 | 16 | 23 | 27 | 10 | 100 | 226 | 81 | 528 | 448 | 478 |
| February | 2016 | 4 | 4 | 8 | 10 | 15 | 23 | 26 | 10 | 100 | 212 | 71 | 523 | 452 | 477 |
| March | 2016 | 5 | 4 | 7 | 13 | 15 | 23 | 25 | 9 | 100 | 194 | 65 | 494 | 429 | 494 |
| April | 2016 | 4 | 4 | 7 | 11 | 15 | 24 | 24 | 10 | 100 | 209 | 76 | 473 | 398 | 504 |
| May | 2016 | 5 | 5 | 6 | 11 | 15 | 24 | 23 | 11 | 100 | 212 | 79 | 474 | 395 | 526 |
| June | 2016 | 4 | 6 | 6 | 10 | 15 | 24 | 24 | 12 | 100 | 216 | 75 | 509 | 435 | 513 |
| July | 2016 | 5 | 5 | 5 | 11 | 16 | 21 | 26 | 11 | 100 | 199 | 72 | 541 | 469 | 506 |
| August | 2016 | 3 | 4 | 5 | 14 | 17 | 21 | 25 | 11 | 100 | 193 | 70 | 536 | 466 | 503 |
| September | 2016 | 3 | 4 | 5 | 12 | 19 | 22 | 24 | 10 | 100 | 190 | 75 | 496 | 421 | 535 |
| October | 2016 | 2 | 6 | 6 | 12 | 17 | 23 | 24 | 10 | 100 | 191 | 70 | 504 | 434 | 555 |
| November | 2016 | 2 | 6 | 7 | 11 | 17 | 23 | 24 | 10 | 100 | 201 | 73 | 486 | 413 | 565 |
| December | 2016 | 2 | 5 | 8 | 11 | 14 | 25 | 23 | 11 | 100 | 205 | 73 | 485 | 411 | 569 |
| January | 2017 | 2 | 6 | 7 | 12 | 13 | 26 | 22 | 12 | 100 | 207 | 71 | 476 | 404 | 587 |
| February | 2017 | 2 | 6 | 6 | 13 | 14 | 24 | 24 | 10 | 100 | 201 | 69 | 503 | 434 | 597 |
| March | 2017 | 2 | 6 | 6 | 13 | 14 | 24 | 24 | 13 | 100 | 202 | 70 | 505 | 435 | 589 |
| April | 2017 | 2 | 5 | 6 | 13 | 14 | 22 | 26 | 13 | 100 | 203 | 72 | 506 | 434 | 565 |
| May | 2017 | 1 | 5 | 7 | 13 | 13 | 22 | 26 | 14 | 100 | 206 | 74 | 500 | 426 | 574 |
| June | 2017 | 1 | 5 | 7 | 13 | 15 | 20 | 30 | 10 | 100 | 225 | 80 | 579 | 500 | 607 |
| July | 2017 | 2 | 4 | 6 | 13 | 15 | 21 | 29 | 10 | 100 | 239 | 80 | 582 | 503 | 629 |
| August | 2017 | 3 | 4 | 5 | 12 | 15 | 19 | 29 | 12 | 100 | 237 | 83 | 617 | 534 | 632 |
| September | 2017 | 3 | 4 | 5 | 11 | 14 | 21 | 28 | 14 | 100 | 238 | 85 | 575 | 490 | 608 |
| October | 2017 | 3 | 4 | 5 | 11 | 13 | 21 | 28 | 14 | 100 | 244 | 86 | 614 | 527 | 586 |
| November | 2017 | 3 | 4 | 6 | 10 | 11 | 23 | 29 | 13 | 100 | 263 | 84 | 636 | 551 | 580 |
| December | 2017 | 3 | 4 | 7 | 10 | 12 | 21 | 32 | 11 | 100 | 275 | 84 | 701 | 616 | 597 |
| January | 2018 | 3 | 4 | 7 | 9 | 13 | 21 | 32 | 11 | 100 | 255 | 83 | 702 | 620 | 616 |
| February | 2018 | 3 | 3 | 6 | 10 | 14 | 19 | 34 | 12 | 100 | 258 | 88 | 741 | 653 | 625 |
| March | 2018 | 3 | 4 | 5 | 11 | 12 | 20 | 31 | 14 | 100 | 244 | 87 | 699 | 612 | 620 |
| April | 2018 | 3 | 3 | 5 | 10 | 12 | 20 | 34 | 14 | 100 | 279 | 97 | 725 | 627 | 638 |
| May | 2018 | 2 | 4 | 5 | 9 | 11 | 22 | 32 | 15 | 100 | 289 | 98 | 697 | 599 | 623 |
| June | 2018 | 2 | 4 | 4 | 11 | 12 | 22 | 33 | 13 | 100 | 294 | 96 | 728 | 632 | 626 |
| July | 2018 | 2 | 5 | 5 | 11 | 13 | 21 | 31 | 12 | 100 | 266 | 85 | 676 | 591 | 622 |
| August | 2018 | 3 | 4 | 6 | 11 | 12 | 20 | 31 | 13 | 100 | 264 | 85 | 702 | 616 | 637 |
| September | 2018 | 3 | 3 | 5 | 10 | 13 | 21 | 31 | 14 | 100 | 262 | 88 | 716 | 627 | 653 |
| October | 2018 | 2 | 3 | 5 | 8 | 14 | 22 | 33 | 13 | 100 | 290 | 109 | 784 | 675 | 645 |

INCOME TOP THIRD

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

| <u>Date of Survey</u> | | <u>Under \$10k</u> | <u>\$10k to \$24k</u> | <u>\$25k to \$49k</u> | <u>\$50k to \$99k</u> | <u>\$100k to \$199k</u> | <u>\$200k to \$499k</u> | <u>\$500k and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>Median 1000's</u> | <u>Percentiles</u> | | | <u>Cases</u> |
|-----------------------|------|--------------------|-----------------------|-----------------------|-----------------------|-------------------------|-------------------------|----------------------|---------------|--------------|----------------------|--------------------|-------------|------------|--------------|
| | | | | | | | | | | | | <u>25th</u> | <u>75th</u> | <u>Rng</u> | |
| November | 2018 | 2 | 4 | 4 | 9 | 14 | 23 | 32 | 12 | 100 | 280 | 105 | 747 | 643 | 628 |
| December | 2018 | 2 | 4 | 5 | 9 | 13 | 23 | 33 | 11 | 100 | 285 | 102 | 726 | 625 | 602 |
| January | 2019 | 2 | 4 | 6 | 12 | 12 | 22 | 31 | 11 | 100 | 262 | 82 | 675 | 592 | 603 |
| February | 2019 | 2 | 3 | 6 | 12 | 13 | 22 | 29 | 12 | 100 | 246 | 82 | 621 | 539 | 611 |
| March | 2019 | 2 | 3 | 5 | 12 | 14 | 21 | 29 | 13 | 100 | 251 | 84 | 654 | 571 | 623 |
| April | 2019 | 2 | 4 | 4 | 11 | 15 | 20 | 30 | 14 | 100 | 259 | 93 | 705 | 613 | 620 |
| May | 2019 | 2 | 5 | 4 | 10 | 14 | 20 | 34 | 12 | 100 | 286 | 98 | 806 | 709 | 601 |
| June | 2019 | 1 | 5 | 5 | 8 | 13 | 21 | 36 | 11 | 100 | 312 | 110 | 816 | 706 | 571 |
| July | 2019 | 1 | 5 | 6 | 10 | 13 | 21 | 34 | 10 | 100 | 294 | 103 | 770 | 667 | 561 |
| August | 2019 | 1 | 4 | 6 | 11 | 13 | 21 | 33 | 12 | 100 | 282 | 103 | 719 | 616 | 573 |
| September | 2019 | 2 | 3 | 5 | 11 | 13 | 19 | 33 | 13 | 100 | 296 | 97 | 754 | 658 | 599 |
| October | 2019 | 4 | 3 | 4 | 9 | 13 | 19 | 33 | 14 | 100 | 310 | 103 | 798 | 695 | 617 |
| November | 2019 | 4 | 3 | 3 | 8 | 13 | 18 | 37 | 14 | 100 | 353 | 111 | 908 | 797 | 634 |
| December | 2019 | 4 | 3 | 3 | 9 | 14 | 18 | 35 | 13 | 100 | 305 | 105 | 840 | 735 | 633 |
| January | 2020 | 3 | 3 | 4 | 10 | 13 | 20 | 36 | 11 | 100 | 304 | 100 | 827 | 727 | 637 |
| February | 2020 | 3 | 3 | 4 | 10 | 12 | 22 | 35 | 11 | 100 | 296 | 109 | 815 | 706 | 644 |
| March | 2020 | 3 | 3 | 4 | 9 | 11 | 24 | 35 | 11 | 100 | 304 | 111 | 800 | 690 | 683 |
| April | 2020 | 3 | 4 | 4 | 9 | 11 | 24 | 33 | 12 | 100 | 302 | 108 | 805 | 697 | 687 |
| May | 2020 | 3 | 5 | 4 | 10 | 10 | 23 | 31 | 13 | 100 | 279 | 87 | 749 | 662 | 706 |
| June | 2020 | 3 | 6 | 5 | 9 | 11 | 23 | 30 | 13 | 100 | 250 | 86 | 730 | 644 | 672 |
| July | 2020 | 3 | 6 | 4 | 9 | 13 | 22 | 29 | 13 | 100 | 237 | 88 | 662 | 573 | 666 |
| August | 2020 | 4 | 6 | 5 | 8 | 14 | 22 | 30 | 12 | 100 | 240 | 93 | 651 | 558 | 665 |
| September | 2020 | 4 | 5 | 5 | 9 | 13 | 21 | 32 | 13 | 100 | 269 | 93 | 674 | 581 | 659 |
| October | 2020 | 3 | 4 | 7 | 8 | 10 | 22 | 35 | 12 | 100 | 302 | 98 | 750 | 651 | 663 |
| November | 2020 | 2 | 4 | 6 | 8 | 11 | 22 | 35 | 11 | 100 | 303 | 100 | 778 | 678 | 638 |
| December | 2020 | 3 | 3 | 5 | 9 | 11 | 21 | 36 | 12 | 100 | 304 | 101 | 843 | 741 | 635 |
| January | 2021 | 3 | 3 | 4 | 9 | 12 | 20 | 35 | 13 | 100 | 300 | 103 | 854 | 751 | 605 |
| February | 2021 | 5 | 3 | 3 | 8 | 12 | 19 | 36 | 14 | 100 | 329 | 103 | 854 | 751 | 593 |
| March | 2021 | 4 | 3 | 4 | 7 | 12 | 20 | 36 | 14 | 100 | 349 | 105 | 813 | 709 | 598 |
| April | 2021 | 3 | 4 | 3 | 9 | 11 | 20 | 39 | 12 | 100 | 369 | 104 | 821 | 717 | 613 |
| May | 2021 | 2 | 4 | 4 | 9 | 10 | 20 | 39 | 12 | 100 | 368 | 102 | 854 | 753 | 615 |
| June | 2021 | 2 | 6 | 4 | 8 | 11 | 19 | 40 | 11 | 100 | 365 | 101 | 930 | 829 | 616 |
| July | 2021 | 1 | 5 | 5 | 7 | 11 | 19 | 38 | 14 | 100 | 349 | 101 | 892 | 791 | 605 |
| August | 2021 | 2 | 4 | 5 | 7 | 12 | 19 | 37 | 15 | 100 | 337 | 110 | 898 | 787 | 598 |
| September | 2021 | 2 | 3 | 4 | 7 | 11 | 20 | 37 | 17 | 100 | 358 | 126 | 894 | 768 | 572 |
| October | 2021 | 2 | 3 | 3 | 6 | 11 | 21 | 40 | 14 | 100 | 388 | 141 | 972 | 832 | 581 |
| November | 2021 | 2 | 4 | 2 | 8 | 10 | 20 | 40 | 14 | 100 | 388 | 131 | 942 | 811 | 593 |
| December | 2021 | 2 | 4 | 2 | 9 | 11 | 20 | 39 | 12 | 100 | 367 | 116 | 932 | 816 | 615 |
| January | 2022 | 2 | 5 | 2 | 9 | 11 | 19 | 38 | 14 | 100 | 348 | 100 | 916 | 816 | 603 |
| February | 2022 | 2 | 4 | 3 | 8 | 12 | 20 | 37 | 13 | 100 | 345 | 103 | 950 | 847 | 597 |
| March | 2022 | 2 | 4 | 4 | 9 | 13 | 18 | 35 | 14 | 100 | 313 | 101 | 940 | 840 | 602 |
| April | 2022 | 2 | 3 | 3 | 9 | 12 | 18 | 37 | 14 | 100 | 356 | 121 | 939 | 818 | 615 |
| May | 2022 | 2 | 3 | 4 | 10 | 12 | 18 | 39 | 13 | 100 | 343 | 118 | 935 | 817 | 621 |
| June | 2022 | 3 | 2 | 4 | 9 | 10 | 19 | 41 | 12 | 100 | 387 | 126 | 956 | 830 | 619 |
| July | 2022 | 3 | 3 | 5 | 9 | 10 | 19 | 38 | 13 | 100 | 341 | 104 | 921 | 817 | 614 |
| August | 2022 | 3 | 2 | 4 | 8 | 12 | 18 | 36 | 17 | 100 | 351 | 111 | 927 | 816 | 606 |
| September | 2022 | 3 | 3 | 5 | 10 | 12 | 18 | 33 | 16 | 100 | 303 | 91 | 827 | 736 | 602 |
| October | 2022 | 3 | 3 | 4 | 10 | 15 | 18 | 33 | 14 | 100 | 276 | 90 | 801 | 710 | 595 |
| November | 2022 | 3 | 5 | 5 | 12 | 14 | 20 | 30 | 12 | 100 | 236 | 77 | 702 | 625 | 607 |
| December | 2022 | 3 | 5 | 3 | 10 | 14 | 18 | 34 | 13 | 100 | 314 | 92 | 794 | 703 | 599 |

INCOME TOP THIRD

**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 | 2 | 4 | 4 | 8 | 13 | 18 | 37 | 13 | 100 | 361 | 110 | 851 | 741 | 584 |
| February | 2023 | 2 | 4 | 4 | 7 | 14 | 19 | 38 | 11 | 100 | 370 | 117 | 830 | 713 | 574 |
| March | 2023 | 2 | 3 | 5 | 10 | 12 | 21 | 35 | 12 | 100 | 311 | 108 | 755 | 647 | 574 |
| April | 2023 | 2 | 3 | 5 | 9 | 12 | 23 | 33 | 13 | 100 | 292 | 103 | 731 | 628 | 581 |
| May | 2023 | 1 | 3 | 6 | 10 | 10 | 23 | 32 | 14 | 100 | 291 | 100 | 712 | 612 | 603 |
| June | 2023 | 2 | 3 | 5 | 9 | 10 | 23 | 35 | 13 | 100 | 321 | 111 | 789 | 678 | 601 |
| July | 2023 | 2 | 2 | 3 | 10 | 10 | 21 | 39 | 12 | 100 | 366 | 123 | 852 | 730 | 594 |
| August | 2023 | 2 | 3 | 2 | 9 | 11 | 20 | 42 | 12 | 100 | 384 | 130 | 900 | 771 | 551 |
| September | 2023 | 1 | 3 | 3 | 9 | 11 | 20 | 41 | 11 | 100 | 387 | 136 | 851 | 715 | 561 |
| October | 2023 | 1 | 4 | 4 | 8 | 11 | 21 | 39 | 11 | 100 | 339 | 115 | 783 | 668 | 573 |
| November | 2023 | 1 | 3 | 6 | 8 | 12 | 19 | 38 | 12 | 100 | 336 | 111 | 815 | 704 | 576 |
| December | 2023 | 2 | 2 | 5 | 9 | 13 | 19 | 38 | 12 | 100 | 310 | 107 | 880 | 773 | 577 |