

# REGION SOUTH

1

**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<br>\$10k | \$10k<br>to \$24k | \$25k<br>to \$49k | \$50k<br>to \$99k | \$100k<br>to \$199k | \$200k<br>to \$499k | \$500k<br>and up | DK, NA | Total | Median<br>1000's | Percentiles |      |     | Cases |
|----------------|------|----------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------------|--------|-------|------------------|-------------|------|-----|-------|
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  | 25th        | 75th | Rng |       |
| March          | 1990 | 33             | 15                | 10                | 10                | 8                   | 4                   | 1                | 18     | 100   | 15               | 5           | 63   | 57  | 349   |
| April          | 1990 | 35             | 15                | 10                | 9                 | 9                   | 4                   | 1                | 17     | 100   | 13               | 5           | 56   | 51  | 347   |
| September      | 1997 | 12             | 14                | 14                | 14                | 12                  | 10                  | 5                | 19     | 100   | 55               | 16          | 140  | 124 | 200   |
| February       | 1998 | 13             | 12                | 12                | 12                | 11                  | 9                   | 5                | 24     | 100   | 55               | 18          | 135  | 116 | 220   |
| November       | 1998 | 12             | 11                | 14                | 14                | 16                  | 11                  | 6                | 16     | 100   | 62               | 19          | 167  | 148 | 230   |
| December       | 1998 | 13             | 14                | 15                | 13                | 17                  | 7                   | 6                | 16     | 100   | 51               | 17          | 135  | 118 | 235   |
| January        | 1999 | 18             | 14                | 13                | 12                | 14                  | 8                   | 6                | 16     | 100   | 46               | 12          | 128  | 116 | 242   |
| February       | 1999 | 18             | 13                | 12                | 12                | 15                  | 6                   | 5                | 19     | 100   | 41               | 12          | 106  | 94  | 244   |
| March          | 1999 | 17             | 12                | 11                | 17                | 13                  | 5                   | 4                | 21     | 100   | 44               | 14          | 97   | 83  | 241   |
| April          | 1999 | 12             | 11                | 14                | 17                | 13                  | 6                   | 4                | 23     | 100   | 50               | 21          | 118  | 97  | 230   |
| May            | 1999 | 10             | 10                | 16                | 17                | 13                  | 7                   | 7                | 20     | 100   | 58               | 25          | 136  | 111 | 214   |
| June           | 1999 | 11             | 11                | 13                | 17                | 14                  | 8                   | 8                | 18     | 100   | 59               | 24          | 144  | 119 | 209   |
| July           | 1999 | 13             | 15                | 11                | 17                | 14                  | 7                   | 6                | 16     | 100   | 52               | 18          | 121  | 103 | 212   |
| August         | 1999 | 15             | 17                | 12                | 12                | 13                  | 10                  | 4                | 18     | 100   | 39               | 13          | 119  | 106 | 224   |
| September      | 1999 | 13             | 18                | 12                | 13                | 11                  | 11                  | 3                | 20     | 100   | 43               | 14          | 124  | 109 | 222   |
| October        | 1999 | 15             | 12                | 10                | 15                | 12                  | 12                  | 5                | 19     | 100   | 52               | 14          | 149  | 135 | 217   |
| November       | 1999 | 13             | 13                | 9                 | 20                | 11                  | 10                  | 8                | 17     | 100   | 57               | 17          | 155  | 139 | 211   |
| December       | 1999 | 14             | 10                | 13                | 13                | 12                  | 10                  | 8                | 20     | 100   | 51               | 15          | 167  | 152 | 211   |
| January        | 2000 | 12             | 12                | 19                | 11                | 10                  | 11                  | 5                | 20     | 100   | 44               | 16          | 136  | 120 | 209   |
| February       | 2000 | 10             | 12                | 20                | 7                 | 12                  | 12                  | 3                | 22     | 100   | 47               | 17          | 139  | 122 | 215   |
| March          | 2000 | 8              | 14                | 20                | 9                 | 13                  | 12                  | 4                | 20     | 100   | 55               | 20          | 140  | 120 | 228   |
| April          | 2000 | 8              | 11                | 14                | 9                 | 13                  | 14                  | 8                | 23     | 100   | 76               | 23          | 203  | 180 | 247   |
| May            | 2000 | 9              | 12                | 12                | 11                | 12                  | 13                  | 8                | 23     | 100   | 74               | 21          | 191  | 170 | 254   |
| June           | 2000 | 12             | 9                 | 6                 | 12                | 12                  | 14                  | 8                | 26     | 100   | 82               | 17          | 212  | 195 | 248   |
| July           | 2000 | 11             | 10                | 10                | 15                | 12                  | 11                  | 6                | 25     | 100   | 66               | 20          | 168  | 148 | 239   |
| August         | 2000 | 11             | 5                 | 11                | 13                | 15                  | 14                  | 7                | 23     | 100   | 83               | 27          | 207  | 180 | 233   |
| September      | 2000 | 10             | 11                | 12                | 12                | 14                  | 13                  | 8                | 21     | 100   | 69               | 28          | 197  | 169 | 230   |
| October        | 2000 | 10             | 17                | 10                | 9                 | 14                  | 12                  | 9                | 19     | 100   | 62               | 22          | 190  | 168 | 221   |
| November       | 2000 | 10             | 21                | 7                 | 11                | 11                  | 12                  | 7                | 21     | 100   | 49               | 15          | 171  | 156 | 226   |
| December       | 2000 | 8              | 20                | 8                 | 11                | 13                  | 12                  | 8                | 19     | 100   | 62               | 17          | 186  | 169 | 214   |
| January        | 2001 | 7              | 16                | 10                | 11                | 14                  | 13                  | 8                | 21     | 100   | 73               | 19          | 203  | 183 | 230   |
| February       | 2001 | 9              | 13                | 12                | 11                | 14                  | 11                  | 10               | 19     | 100   | 68               | 20          | 194  | 174 | 230   |
| March          | 2001 | 11             | 13                | 14                | 12                | 13                  | 10                  | 7                | 20     | 100   | 52               | 18          | 158  | 140 | 257   |
| April          | 2001 | 14             | 13                | 14                | 13                | 11                  | 9                   | 6                | 21     | 100   | 43               | 17          | 138  | 121 | 277   |
| May            | 2001 | 12             | 15                | 13                | 11                | 11                  | 8                   | 6                | 26     | 100   | 42               | 16          | 136  | 120 | 287   |
| June           | 2001 | 11             | 13                | 10                | 10                | 12                  | 9                   | 6                | 29     | 100   | 55               | 17          | 146  | 129 | 269   |
| July           | 2001 | 8              | 13                | 10                | 11                | 12                  | 10                  | 7                | 30     | 100   | 65               | 18          | 172  | 154 | 244   |
| August         | 2001 | 9              | 12                | 10                | 13                | 11                  | 9                   | 6                | 30     | 100   | 64               | 18          | 142  | 124 | 247   |
| September      | 2001 | 11             | 10                | 11                | 14                | 8                   | 10                  | 6                | 30     | 100   | 53               | 17          | 154  | 137 | 274   |
| October        | 2001 | 13             | 8                 | 11                | 14                | 8                   | 11                  | 5                | 30     | 100   | 49               | 17          | 156  | 138 | 289   |
| November       | 2001 | 12             | 10                | 9                 | 13                | 9                   | 13                  | 6                | 29     | 100   | 57               | 18          | 188  | 170 | 281   |
| December       | 2001 | 11             | 12                | 10                | 14                | 12                  | 9                   | 5                | 27     | 100   | 54               | 18          | 159  | 141 | 259   |

# REGION SOUTH

2

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

| <u>Date of Survey</u> |      | <u>Under</u><br><u>\$10k</u> | <u>\$10k</u><br><u>to \$24k</u> | <u>\$25k</u><br><u>to \$49k</u> | <u>\$50k</u><br><u>to \$99k</u> | <u>\$100k</u><br><u>to \$199k</u> | <u>\$200k</u><br><u>to \$499k</u> | <u>\$500k</u><br><u>and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>Median</u><br><u>1000's</u> | <u>Percentiles</u> |             |            | <u>Cases</u> |
|-----------------------|------|------------------------------|---------------------------------|---------------------------------|---------------------------------|-----------------------------------|-----------------------------------|--------------------------------|---------------|--------------|--------------------------------|--------------------|-------------|------------|--------------|
|                       |      |                              |                                 |                                 |                                 |                                   |                                   |                                |               |              |                                | <u>25th</u>        | <u>75th</u> | <u>Rng</u> |              |
| January               | 2002 | 10                           | 13                              | 11                              | 12                              | 12                                | 8                                 | 6                              | 28            | 100          | 50                             | 17                 | 138         | 121        | 255          |
| February              | 2002 | 9                            | 13                              | 15                              | 11                              | 12                                | 8                                 | 6                              | 26            | 100          | 47                             | 20                 | 137         | 118        | 253          |
| March                 | 2002 | 8                            | 12                              | 15                              | 10                              | 12                                | 12                                | 7                              | 25            | 100          | 54                             | 21                 | 166         | 145        | 275          |
| April                 | 2002 | 8                            | 10                              | 14                              | 10                              | 14                                | 12                                | 8                              | 24            | 100          | 65                             | 22                 | 182         | 160        | 286          |
| May                   | 2002 | 10                           | 10                              | 17                              | 10                              | 14                                | 10                                | 6                              | 24            | 100          | 59                             | 21                 | 151         | 131        | 293          |
| June                  | 2002 | 11                           | 15                              | 15                              | 11                              | 12                                | 9                                 | 5                              | 23            | 100          | 48                             | 18                 | 134         | 116        | 287          |
| July                  | 2002 | 10                           | 17                              | 14                              | 13                              | 14                                | 8                                 | 4                              | 19            | 100          | 41                             | 18                 | 129         | 112        | 282          |
| August                | 2002 | 11                           | 18                              | 12                              | 12                              | 14                                | 7                                 | 5                              | 20            | 100          | 40                             | 16                 | 136         | 121        | 278          |
| September             | 2002 | 12                           | 12                              | 14                              | 13                              | 15                                | 10                                | 4                              | 19            | 100          | 52                             | 19                 | 150         | 131        | 272          |
| October               | 2002 | 14                           | 11                              | 15                              | 13                              | 13                                | 10                                | 3                              | 22            | 100          | 50                             | 17                 | 133         | 116        | 280          |
| November              | 2002 | 13                           | 12                              | 12                              | 14                              | 15                                | 12                                | 3                              | 19            | 100          | 54                             | 18                 | 142         | 124        | 285          |
| December              | 2002 | 13                           | 14                              | 12                              | 13                              | 14                                | 9                                 | 4                              | 21            | 100          | 45                             | 15                 | 131         | 116        | 304          |
|                       |      |                              |                                 |                                 |                                 |                                   |                                   |                                |               |              |                                |                    |             |            |              |
| January               | 2003 | 12                           | 15                              | 12                              | 10                              | 15                                | 11                                | 6                              | 19            | 100          | 49                             | 14                 | 172         | 157        | 286          |
| February              | 2003 | 15                           | 11                              | 15                              | 11                              | 13                                | 9                                 | 5                              | 21            | 100          | 45                             | 13                 | 155         | 142        | 263          |
| March                 | 2003 | 13                           | 11                              | 13                              | 12                              | 14                                | 11                                | 5                              | 20            | 100          | 56                             | 16                 | 169         | 152        | 251          |
| April                 | 2003 | 15                           | 11                              | 14                              | 13                              | 13                                | 9                                 | 3                              | 22            | 100          | 45                             | 15                 | 126         | 111        | 276          |
| August                | 2003 | 21                           | 14                              | 11                              | 14                              | 9                                 | 10                                | 5                              | 16            | 100          | 41                             | 10                 | 108         | 99         | 286          |
| September             | 2003 | 20                           | 12                              | 12                              | 15                              | 10                                | 10                                | 6                              | 15            | 100          | 45                             | 10                 | 116         | 106        | 298          |
| October               | 2003 | 17                           | 18                              | 12                              | 13                              | 8                                 | 11                                | 3                              | 18            | 100          | 34                             | 10                 | 100         | 89         | 298          |
| November              | 2003 | 15                           | 18                              | 12                              | 13                              | 9                                 | 10                                | 6                              | 18            | 100          | 42                             | 12                 | 126         | 114        | 323          |
| December              | 2003 | 15                           | 16                              | 12                              | 12                              | 11                                | 9                                 | 6                              | 20            | 100          | 42                             | 13                 | 133         | 121        | 323          |
|                       |      |                              |                                 |                                 |                                 |                                   |                                   |                                |               |              |                                |                    |             |            |              |
| January               | 2004 | 14                           | 13                              | 11                              | 14                              | 10                                | 11                                | 7                              | 19            | 100          | 52                             | 14                 | 166         | 153        | 335          |
| February              | 2004 | 17                           | 14                              | 11                              | 14                              | 10                                | 11                                | 5                              | 18            | 100          | 44                             | 12                 | 140         | 128        | 333          |
| March                 | 2004 | 17                           | 16                              | 10                              | 16                              | 9                                 | 13                                | 4                              | 16            | 100          | 45                             | 12                 | 145         | 133        | 332          |
| April                 | 2004 | 17                           | 16                              | 10                              | 15                              | 14                                | 9                                 | 4                              | 15            | 100          | 44                             | 11                 | 117         | 106        | 327          |
| May                   | 2004 | 14                           | 14                              | 12                              | 16                              | 16                                | 9                                 | 6                              | 14            | 100          | 51                             | 15                 | 137         | 122        | 313          |
| June                  | 2004 | 12                           | 14                              | 14                              | 14                              | 17                                | 9                                 | 7                              | 14            | 100          | 51                             | 17                 | 143         | 126        | 311          |
| July                  | 2004 | 13                           | 14                              | 14                              | 13                              | 13                                | 11                                | 7                              | 15            | 100          | 47                             | 17                 | 156         | 139        | 320          |
| August                | 2004 | 14                           | 16                              | 11                              | 14                              | 13                                | 10                                | 6                              | 16            | 100          | 47                             | 15                 | 141         | 126        | 336          |
| September             | 2004 | 17                           | 16                              | 9                               | 14                              | 12                                | 11                                | 4                              | 17            | 100          | 44                             | 11                 | 132         | 120        | 324          |
| October               | 2004 | 17                           | 14                              | 10                              | 17                              | 9                                 | 10                                | 4                              | 20            | 100          | 43                             | 11                 | 110         | 99         | 325          |
| November              | 2004 | 17                           | 11                              | 10                              | 15                              | 10                                | 12                                | 3                              | 21            | 100          | 44                             | 13                 | 118         | 105        | 325          |
| December              | 2004 | 13                           | 12                              | 13                              | 14                              | 10                                | 11                                | 4                              | 23            | 100          | 47                             | 16                 | 130         | 113        | 323          |
|                       |      |                              |                                 |                                 |                                 |                                   |                                   |                                |               |              |                                |                    |             |            |              |
| January               | 2005 | 12                           | 12                              | 13                              | 13                              | 12                                | 11                                | 6                              | 21            | 100          | 49                             | 19                 | 149         | 130        | 314          |
| February              | 2005 | 11                           | 13                              | 13                              | 13                              | 13                                | 8                                 | 8                              | 22            | 100          | 49                             | 18                 | 142         | 124        | 319          |
| March                 | 2005 | 12                           | 16                              | 10                              | 15                              | 12                                | 9                                 | 6                              | 20            | 100          | 47                             | 17                 | 125         | 108        | 319          |
| April                 | 2005 | 14                           | 16                              | 10                              | 15                              | 11                                | 11                                | 4                              | 19            | 100          | 45                             | 15                 | 109         | 94         | 316          |
| May                   | 2005 | 14                           | 15                              | 12                              | 15                              | 11                                | 12                                | 2                              | 19            | 100          | 45                             | 15                 | 113         | 98         | 311          |
| June                  | 2005 | 16                           | 12                              | 13                              | 14                              | 15                                | 10                                | 3                              | 17            | 100          | 47                             | 14                 | 118         | 104        | 330          |
| July                  | 2005 | 16                           | 11                              | 12                              | 13                              | 16                                | 10                                | 4                              | 17            | 100          | 51                             | 14                 | 136         | 122        | 335          |
| August                | 2005 | 18                           | 11                              | 12                              | 11                              | 15                                | 12                                | 6                              | 16            | 100          | 49                             | 12                 | 158         | 146        | 346          |
| September             | 2005 | 16                           | 10                              | 13                              | 12                              | 14                                | 15                                | 6                              | 16            | 100          | 55                             | 16                 | 176         | 160        | 339          |
| October               | 2005 | 15                           | 12                              | 12                              | 15                              | 12                                | 14                                | 6                              | 13            | 100          | 52                             | 16                 | 158         | 142        | 341          |
| November              | 2005 | 16                           | 12                              | 12                              | 16                              | 13                                | 13                                | 5                              | 14            | 100          | 50                             | 15                 | 136         | 121        | 329          |
| December              | 2005 | 17                           | 13                              | 11                              | 16                              | 13                                | 10                                | 5                              | 16            | 100          | 47                             | 13                 | 120         | 108        | 332          |
|                       |      |                              |                                 |                                 |                                 |                                   |                                   |                                |               |              |                                |                    |             |            |              |
| January               | 2006 | 17                           | 10                              | 12                              | 14                              | 12                                | 12                                | 5                              | 19            | 100          | 53                             | 16                 | 149         | 133        | 339          |
| February              | 2006 | 14                           | 10                              | 10                              | 15                              | 11                                | 13                                | 7                              | 20            | 100          | 61                             | 19                 | 195         | 176        | 332          |
| March                 | 2006 | 14                           | 7                               | 10                              | 16                              | 10                                | 15                                | 9                              | 18            | 100          | 68                             | 22                 | 221         | 198        | 314          |
| April                 | 2006 | 13                           | 12                              | 13                              | 14                              | 12                                | 13                                | 10                             | 13            | 100          | 57                             | 19                 | 206         | 187        | 293          |

REGION SOUTH

3

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

| Date of Survey |      | Under<br>\$10k | \$10k<br>to \$24k | \$25k<br>to \$49k | \$50k<br>to \$99k | \$100k<br>to \$199k | \$200k<br>to \$499k | \$500k<br>and up | DK, NA | Total | Median<br>1000's | Percentiles |      |     | Cases |
|----------------|------|----------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------------|--------|-------|------------------|-------------|------|-----|-------|
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  | 25th        | 75th | Rng |       |
| May            | 2006 | 11             | 13                | 14                | 14                | 12                  | 14                  | 7                | 14     | 100   | 54               | 20          | 171  | 151 | 287   |
| June           | 2006 | 11             | 14                | 14                | 13                | 13                  | 13                  | 7                | 14     | 100   | 56               | 19          | 156  | 137 | 294   |
| July           | 2006 | 11             | 13                | 12                | 15                | 14                  | 12                  | 5                | 18     | 100   | 58               | 19          | 148  | 129 | 306   |
| August         | 2006 | 12             | 12                | 12                | 15                | 15                  | 12                  | 6                | 16     | 100   | 66               | 19          | 155  | 135 | 308   |
| September      | 2006 | 12             | 12                | 12                | 13                | 13                  | 13                  | 7                | 18     | 100   | 69               | 19          | 190  | 170 | 312   |
| October        | 2006 | 13             | 9                 | 10                | 13                | 13                  | 16                  | 8                | 17     | 100   | 78               | 22          | 215  | 193 | 305   |
| November       | 2006 | 12             | 10                | 11                | 15                | 12                  | 15                  | 9                | 16     | 100   | 70               | 22          | 195  | 173 | 308   |
| December       | 2006 | 10             | 11                | 12                | 16                | 14                  | 13                  | 8                | 18     | 100   | 67               | 24          | 165  | 141 | 314   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2007 | 8              | 14                | 13                | 17                | 14                  | 9                   | 8                | 17     | 100   | 61               | 23          | 141  | 119 | 322   |
| February       | 2007 | 6              | 16                | 13                | 15                | 15                  | 9                   | 9                | 16     | 100   | 61               | 23          | 155  | 133 | 342   |
| March          | 2007 | 9              | 15                | 13                | 16                | 13                  | 9                   | 9                | 14     | 100   | 56               | 18          | 144  | 127 | 346   |
| April          | 2007 | 11             | 12                | 13                | 14                | 13                  | 13                  | 9                | 16     | 100   | 68               | 20          | 181  | 161 | 343   |
| May            | 2007 | 12             | 10                | 10                | 17                | 12                  | 15                  | 8                | 15     | 100   | 73               | 22          | 196  | 175 | 335   |
| June           | 2007 | 9              | 11                | 10                | 16                | 13                  | 16                  | 8                | 16     | 100   | 75               | 24          | 212  | 188 | 325   |
| July           | 2007 | 8              | 12                | 11                | 16                | 12                  | 16                  | 7                | 18     | 100   | 67               | 23          | 218  | 195 | 339   |
| August         | 2007 | 7              | 14                | 14                | 12                | 12                  | 15                  | 7                | 19     | 100   | 63               | 22          | 220  | 199 | 335   |
| September      | 2007 | 6              | 12                | 15                | 10                | 11                  | 16                  | 6                | 22     | 100   | 63               | 25          | 230  | 206 | 337   |
| October        | 2007 | 8              | 15                | 15                | 10                | 9                   | 15                  | 10               | 18     | 100   | 58               | 23          | 238  | 216 | 316   |
| November       | 2007 | 8              | 14                | 13                | 11                | 9                   | 14                  | 10               | 21     | 100   | 59               | 23          | 234  | 212 | 324   |
| December       | 2007 | 11             | 13                | 11                | 12                | 10                  | 14                  | 11               | 17     | 100   | 61               | 22          | 228  | 207 | 333   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2008 | 11             | 11                | 9                 | 13                | 11                  | 15                  | 9                | 22     | 100   | 63               | 20          | 234  | 214 | 351   |
| February       | 2008 | 13             | 8                 | 12                | 13                | 13                  | 14                  | 9                | 18     | 100   | 63               | 22          | 219  | 197 | 332   |
| March          | 2008 | 11             | 9                 | 14                | 12                | 12                  | 12                  | 8                | 20     | 100   | 57               | 22          | 205  | 182 | 322   |
| April          | 2008 | 13             | 10                | 17                | 13                | 13                  | 10                  | 8                | 15     | 100   | 50               | 21          | 152  | 130 | 305   |
| May            | 2008 | 13             | 12                | 14                | 13                | 12                  | 11                  | 9                | 17     | 100   | 51               | 17          | 172  | 155 | 312   |
| June           | 2008 | 16             | 11                | 11                | 15                | 13                  | 12                  | 9                | 14     | 100   | 59               | 15          | 183  | 168 | 308   |
| July           | 2008 | 14             | 9                 | 10                | 15                | 13                  | 15                  | 7                | 16     | 100   | 64               | 17          | 203  | 187 | 299   |
| August         | 2008 | 14             | 7                 | 11                | 17                | 11                  | 17                  | 7                | 16     | 100   | 66               | 23          | 213  | 190 | 311   |
| September      | 2008 | 12             | 8                 | 12                | 17                | 11                  | 16                  | 9                | 15     | 100   | 66               | 26          | 219  | 193 | 314   |
| October        | 2008 | 14             | 8                 | 12                | 17                | 14                  | 14                  | 8                | 13     | 100   | 65               | 25          | 193  | 169 | 331   |
| November       | 2008 | 13             | 9                 | 11                | 16                | 16                  | 11                  | 8                | 16     | 100   | 69               | 22          | 182  | 160 | 319   |
| December       | 2008 | 12             | 14                | 10                | 14                | 16                  | 11                  | 6                | 16     | 100   | 62               | 20          | 162  | 142 | 329   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2009 | 10             | 14                | 9                 | 15                | 14                  | 13                  | 6                | 18     | 100   | 62               | 21          | 176  | 154 | 323   |
| February       | 2009 | 13             | 14                | 10                | 15                | 12                  | 14                  | 5                | 16     | 100   | 53               | 17          | 165  | 148 | 332   |
| March          | 2009 | 17             | 10                | 11                | 14                | 13                  | 14                  | 6                | 16     | 100   | 55               | 16          | 171  | 155 | 326   |
| April          | 2009 | 18             | 10                | 11                | 12                | 14                  | 13                  | 6                | 15     | 100   | 54               | 13          | 165  | 152 | 343   |
| May            | 2009 | 16             | 10                | 9                 | 13                | 16                  | 13                  | 8                | 16     | 100   | 64               | 15          | 180  | 165 | 330   |
| June           | 2009 | 14             | 10                | 10                | 14                | 17                  | 12                  | 8                | 16     | 100   | 64               | 18          | 175  | 157 | 336   |
| July           | 2009 | 12             | 11                | 12                | 15                | 16                  | 12                  | 8                | 15     | 100   | 65               | 20          | 175  | 155 | 310   |
| August         | 2009 | 11             | 11                | 16                | 15                | 15                  | 11                  | 7                | 14     | 100   | 57               | 23          | 155  | 132 | 320   |
| September      | 2009 | 12             | 12                | 15                | 13                | 13                  | 12                  | 8                | 15     | 100   | 54               | 20          | 168  | 148 | 304   |
| October        | 2009 | 11             | 10                | 14                | 12                | 10                  | 14                  | 10               | 18     | 100   | 70               | 23          | 214  | 191 | 324   |
| November       | 2009 | 10             | 13                | 13                | 9                 | 10                  | 15                  | 11               | 19     | 100   | 73               | 21          | 232  | 211 | 330   |
| December       | 2009 | 9              | 11                | 11                | 10                | 11                  | 19                  | 10               | 19     | 100   | 90               | 26          | 237  | 211 | 326   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2010 | 12             | 13                | 12                | 10                | 12                  | 17                  | 8                | 16     | 100   | 69               | 22          | 203  | 181 | 311   |
| February       | 2010 | 11             | 13                | 13                | 11                | 14                  | 17                  | 6                | 15     | 100   | 68               | 23          | 183  | 160 | 291   |
| March          | 2010 | 12             | 15                | 13                | 10                | 13                  | 14                  | 6                | 16     | 100   | 55               | 17          | 179  | 162 | 304   |
| April          | 2010 | 8              | 14                | 12                | 12                | 13                  | 15                  | 10               | 18     | 100   | 77               | 23          | 223  | 200 | 307   |
| May            | 2010 | 8              | 11                | 10                | 12                | 13                  | 15                  | 10               | 19     | 100   | 87               | 25          | 242  | 217 | 317   |
| June           | 2010 | 5              | 13                | 11                | 14                | 14                  | 15                  | 10               | 17     | 100   | 93               | 29          | 236  | 207 | 305   |

REGION SOUTH

4

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

| Date of Survey |      | Under<br>\$10k | \$10k<br>to \$24k | \$25k<br>to \$49k | \$50k<br>to \$99k | \$100k<br>to \$199k | \$200k<br>to \$499k | \$500k<br>and up | DK, NA | Total | Median<br>1000's | Percentiles |      |     | Cases |
|----------------|------|----------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------------|--------|-------|------------------|-------------|------|-----|-------|
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  | 25th        | 75th | Rng |       |
| July           | 2010 | 8              | 14                | 12                | 12                | 16                  | 13                  | 8                | 17     | 100   | 74               | 23          | 191  | 168 | 308   |
| August         | 2010 | 9              | 14                | 12                | 11                | 15                  | 15                  | 9                | 16     | 100   | 76               | 25          | 207  | 181 | 302   |
| September      | 2010 | 11             | 13                | 9                 | 12                | 13                  | 15                  | 8                | 20     | 100   | 69               | 21          | 205  | 184 | 305   |
| October        | 2010 | 10             | 11                | 8                 | 14                | 13                  | 18                  | 8                | 19     | 100   | 84               | 25          | 229  | 204 | 311   |
| November       | 2010 | 9              | 11                | 8                 | 14                | 11                  | 17                  | 9                | 20     | 100   | 77               | 24          | 249  | 224 | 317   |
| December       | 2010 | 8              | 12                | 12                | 12                | 13                  | 19                  | 12               | 13     | 100   | 82               | 28          | 271  | 242 | 321   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2011 | 6              | 12                | 16                | 11                | 12                  | 17                  | 12               | 15     | 100   | 70               | 28          | 261  | 232 | 319   |
| February       | 2011 | 8              | 10                | 13                | 11                | 14                  | 17                  | 11               | 16     | 100   | 94               | 30          | 239  | 209 | 304   |
| March          | 2011 | 8              | 9                 | 11                | 13                | 14                  | 17                  | 8                | 20     | 100   | 97               | 30          | 226  | 196 | 303   |
| April          | 2011 | 11             | 9                 | 7                 | 16                | 13                  | 17                  | 9                | 19     | 100   | 102              | 27          | 224  | 197 | 297   |
| May            | 2011 | 8              | 11                | 9                 | 16                | 12                  | 17                  | 9                | 18     | 100   | 85               | 25          | 239  | 214 | 315   |
| June           | 2011 | 9              | 11                | 10                | 14                | 12                  | 16                  | 11               | 17     | 100   | 92               | 26          | 268  | 242 | 318   |
| July           | 2011 | 7              | 11                | 12                | 12                | 14                  | 15                  | 10               | 18     | 100   | 91               | 27          | 256  | 229 | 324   |
| August         | 2011 | 10             | 12                | 11                | 10                | 16                  | 15                  | 9                | 18     | 100   | 92               | 22          | 233  | 211 | 298   |
| September      | 2011 | 8              | 12                | 10                | 11                | 15                  | 14                  | 8                | 21     | 100   | 86               | 24          | 220  | 196 | 293   |
| October        | 2011 | 11             | 12                | 9                 | 11                | 15                  | 14                  | 8                | 20     | 100   | 79               | 20          | 212  | 192 | 285   |
| November       | 2011 | 11             | 12                | 10                | 13                | 14                  | 13                  | 9                | 19     | 100   | 71               | 21          | 216  | 195 | 303   |
| December       | 2011 | 9              | 11                | 12                | 12                | 12                  | 15                  | 11               | 18     | 100   | 87               | 23          | 233  | 210 | 296   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2012 | 5              | 11                | 14                | 14                | 9                   | 17                  | 11               | 19     | 100   | 95               | 30          | 247  | 217 | 297   |
| February       | 2012 | 6              | 9                 | 15                | 14                | 9                   | 16                  | 11               | 20     | 100   | 88               | 29          | 236  | 207 | 286   |
| March          | 2012 | 9              | 8                 | 16                | 15                | 11                  | 12                  | 9                | 20     | 100   | 67               | 27          | 194  | 167 | 290   |
| April          | 2012 | 11             | 9                 | 13                | 13                | 12                  | 14                  | 9                | 19     | 100   | 70               | 23          | 197  | 174 | 289   |
| May            | 2012 | 10             | 11                | 12                | 12                | 14                  | 16                  | 10               | 16     | 100   | 82               | 25          | 225  | 201 | 314   |
| June           | 2012 | 9              | 11                | 9                 | 11                | 13                  | 18                  | 12               | 17     | 100   | 107              | 30          | 279  | 250 | 304   |
| July           | 2012 | 7              | 10                | 10                | 11                | 16                  | 18                  | 13               | 16     | 100   | 113              | 33          | 271  | 238 | 315   |
| August         | 2012 | 6              | 6                 | 9                 | 15                | 13                  | 15                  | 15               | 21     | 100   | 113              | 43          | 336  | 294 | 297   |
| September      | 2012 | 6              | 5                 | 7                 | 15                | 16                  | 14                  | 16               | 20     | 100   | 111              | 47          | 336  | 288 | 296   |
| October        | 2012 | 6              | 9                 | 6                 | 15                | 15                  | 12                  | 17               | 20     | 100   | 104              | 44          | 339  | 295 | 292   |
| November       | 2012 | 9              | 8                 | 7                 | 15                | 18                  | 11                  | 13               | 19     | 100   | 99               | 37          | 236  | 199 | 302   |
| December       | 2012 | 10             | 9                 | 8                 | 15                | 15                  | 14                  | 11               | 18     | 100   | 90               | 30          | 225  | 195 | 308   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2013 | 10             | 6                 | 9                 | 16                | 16                  | 16                  | 10               | 17     | 100   | 96               | 34          | 231  | 197 | 302   |
| February       | 2013 | 7              | 6                 | 9                 | 14                | 16                  | 18                  | 12               | 18     | 100   | 109              | 40          | 279  | 239 | 283   |
| March          | 2013 | 7              | 9                 | 10                | 14                | 16                  | 14                  | 13               | 17     | 100   | 97               | 33          | 251  | 218 | 291   |
| April          | 2013 | 8              | 11                | 8                 | 15                | 15                  | 13                  | 12               | 19     | 100   | 87               | 28          | 242  | 214 | 297   |
| May            | 2013 | 9              | 11                | 8                 | 14                | 13                  | 14                  | 13               | 18     | 100   | 95               | 25          | 280  | 255 | 311   |
| June           | 2013 | 10             | 11                | 8                 | 12                | 13                  | 13                  | 13               | 18     | 100   | 90               | 23          | 286  | 262 | 307   |
| July           | 2013 | 10             | 9                 | 10                | 14                | 14                  | 13                  | 14               | 16     | 100   | 93               | 27          | 287  | 260 | 318   |
| August         | 2013 | 10             | 10                | 9                 | 15                | 14                  | 12                  | 14               | 15     | 100   | 81               | 31          | 301  | 269 | 318   |
| September      | 2013 | 7              | 8                 | 9                 | 19                | 12                  | 15                  | 14               | 17     | 100   | 87               | 40          | 330  | 290 | 319   |
| October        | 2013 | 7              | 8                 | 8                 | 16                | 13                  | 13                  | 16               | 19     | 100   | 92               | 37          | 337  | 300 | 310   |
| November       | 2013 | 8              | 8                 | 10                | 15                | 11                  | 14                  | 14               | 20     | 100   | 85               | 30          | 306  | 276 | 318   |
| December       | 2013 | 9              | 10                | 8                 | 13                | 16                  | 11                  | 14               | 19     | 100   | 88               | 26          | 267  | 241 | 313   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2014 | 10             | 10                | 8                 | 13                | 15                  | 13                  | 13               | 18     | 100   | 87               | 26          | 277  | 252 | 321   |
| February       | 2014 | 10             | 10                | 7                 | 12                | 16                  | 13                  | 15               | 17     | 100   | 109              | 29          | 291  | 262 | 321   |
| March          | 2014 | 11             | 10                | 8                 | 11                | 14                  | 14                  | 14               | 18     | 100   | 102              | 25          | 298  | 273 | 342   |
| April          | 2014 | 10             | 8                 | 8                 | 10                | 14                  | 15                  | 16               | 18     | 100   | 119              | 32          | 348  | 317 | 325   |
| May            | 2014 | 11             | 10                | 11                | 11                | 12                  | 15                  | 13               | 17     | 100   | 90               | 25          | 282  | 257 | 309   |
| June           | 2014 | 10             | 8                 | 12                | 11                | 13                  | 14                  | 16               | 15     | 100   | 98               | 31          | 335  | 304 | 297   |
| July           | 2014 | 12             | 9                 | 10                | 12                | 12                  | 15                  | 15               | 15     | 100   | 89               | 26          | 332  | 306 | 321   |
| August         | 2014 | 13             | 7                 | 8                 | 10                | 12                  | 17                  | 18               | 15     | 100   | 137              | 26          | 405  | 379 | 327   |

REGION SOUTH

5

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

| <u>Date of Survey</u> |      | <u>Under</u> | <u>\$10k</u>    | <u>\$25k</u>    | <u>\$50k</u>    | <u>\$100k</u>    | <u>\$200k</u>    | <u>\$500k</u> | <u>DK, NA</u> | <u>Total</u> | <u>Median</u> | <u>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>1000's</u> | <u>25th</u>        | <u>75th</u> | <u>Rng</u> |              |
| September             | 2014 | 14           | 7               | 7               | 10              | 10               | 19               | 18            | 15            | 100          | 138           | 25                 | 387         | 362        | 334          |
| October               | 2014 | 12           | 9               | 8               | 9               | 12               | 18               | 17            | 15            | 100          | 131           | 24                 | 344         | 320        | 330          |
| November              | 2014 | 11           | 9               | 8               | 11              | 15               | 16               | 15            | 16            | 100          | 100           | 29                 | 305         | 276        | 330          |
| December              | 2014 | 11           | 9               | 8               | 9               | 14               | 15               | 14            | 20            | 100          | 96            | 26                 | 295         | 269        | 338          |
|                       |      |              |                 |                 |                 |                  |                  |               |               |              |               |                    |             |            |              |
| January               | 2015 | 12           | 8               | 8               | 11              | 12               | 15               | 16            | 18            | 100          | 95            | 26                 | 320         | 295        | 332          |
| February              | 2015 | 10           | 9               | 9               | 12              | 12               | 14               | 17            | 17            | 100          | 93            | 29                 | 351         | 322        | 350          |
| March                 | 2015 | 10           | 7               | 9               | 14              | 14               | 15               | 17            | 13            | 100          | 97            | 32                 | 347         | 315        | 351          |
| April                 | 2015 | 8            | 8               | 9               | 12              | 15               | 18               | 16            | 14            | 100          | 115           | 35                 | 331         | 296        | 355          |
| May                   | 2015 | 8            | 9               | 8               | 13              | 16               | 18               | 15            | 14            | 100          | 122           | 35                 | 310         | 275        | 340          |
| June                  | 2015 | 7            | 11              | 7               | 11              | 17               | 18               | 15            | 13            | 100          | 125           | 34                 | 310         | 276        | 334          |
| July                  | 2015 | 8            | 8               | 9               | 15              | 17               | 15               | 16            | 12            | 100          | 107           | 36                 | 318         | 282        | 331          |
| August                | 2015 | 10           | 9               | 11              | 13              | 15               | 17               | 16            | 10            | 100          | 101           | 31                 | 330         | 299        | 358          |
| September             | 2015 | 9            | 8               | 10              | 16              | 14               | 16               | 14            | 13            | 100          | 97            | 35                 | 314         | 279        | 358          |
| October               | 2015 | 9            | 10              | 10              | 12              | 14               | 18               | 14            | 13            | 100          | 100           | 33                 | 307         | 273        | 362          |
| November              | 2015 | 8            | 11              | 10              | 12              | 16               | 16               | 12            | 14            | 100          | 94            | 32                 | 251         | 219        | 348          |
| December              | 2015 | 10           | 11              | 11              | 9               | 14               | 15               | 15            | 14            | 100          | 95            | 26                 | 270         | 244        | 337          |
|                       |      |              |                 |                 |                 |                  |                  |               |               |              |               |                    |             |            |              |
| January               | 2016 | 10           | 11              | 11              | 11              | 13               | 15               | 13            | 16            | 100          | 86            | 24                 | 256         | 233        | 336          |
| February              | 2016 | 13           | 9               | 11              | 9               | 12               | 15               | 12            | 18            | 100          | 80            | 23                 | 252         | 229        | 318          |
| March                 | 2016 | 13           | 7               | 11              | 11              | 13               | 17               | 11            | 17            | 100          | 83            | 26                 | 245         | 219        | 314          |
| April                 | 2016 | 13           | 6               | 11              | 10              | 17               | 17               | 11            | 16            | 100          | 93            | 27                 | 246         | 218        | 300          |
| May                   | 2016 | 12           | 7               | 9               | 12              | 16               | 18               | 12            | 14            | 100          | 103           | 29                 | 276         | 247        | 318          |
| June                  | 2016 | 13           | 8               | 9               | 11              | 15               | 17               | 13            | 14            | 100          | 99            | 24                 | 274         | 250        | 348          |
| July                  | 2016 | 13           | 10              | 9               | 12              | 12               | 15               | 14            | 15            | 100          | 88            | 22                 | 271         | 249        | 386          |
| August                | 2016 | 11           | 10              | 10              | 12              | 14               | 14               | 14            | 15            | 100          | 89            | 26                 | 256         | 230        | 399          |
| September             | 2016 | 8            | 10              | 10              | 13              | 17               | 14               | 14            | 13            | 100          | 92            | 33                 | 246         | 214        | 387          |
| October               | 2016 | 7            | 10              | 9               | 13              | 17               | 16               | 14            | 13            | 100          | 102           | 33                 | 294         | 261        | 376          |
| November              | 2016 | 9            | 9               | 9               | 14              | 16               | 18               | 14            | 12            | 100          | 103           | 32                 | 302         | 271        | 375          |
| December              | 2016 | 10           | 8               | 8               | 13              | 14               | 19               | 14            | 13            | 100          | 114           | 33                 | 328         | 295        | 407          |
|                       |      |              |                 |                 |                 |                  |                  |               |               |              |               |                    |             |            |              |
| January               | 2017 | 9            | 11              | 9               | 14              | 14               | 19               | 13            | 12            | 100          | 101           | 33                 | 279         | 246        | 440          |
| February              | 2017 | 10           | 13              | 8               | 15              | 13               | 17               | 14            | 11            | 100          | 93            | 28                 | 265         | 237        | 457          |
| March                 | 2017 | 10           | 14              | 8               | 13              | 14               | 18               | 13            | 10            | 100          | 97            | 27                 | 260         | 233        | 449          |
| April                 | 2017 | 10           | 11              | 7               | 15              | 14               | 15               | 16            | 12            | 100          | 104           | 29                 | 309         | 281        | 423          |
| May                   | 2017 | 8            | 10              | 8               | 15              | 13               | 14               | 18            | 13            | 100          | 106           | 33                 | 368         | 336        | 419          |
| June                  | 2017 | 9            | 10              | 8               | 15              | 12               | 12               | 21            | 14            | 100          | 104           | 30                 | 413         | 384        | 417          |
| July                  | 2017 | 9            | 10              | 9               | 15              | 11               | 14               | 20            | 12            | 100          | 106           | 31                 | 417         | 386        | 392          |
| August                | 2017 | 10           | 9               | 7               | 13              | 12               | 16               | 17            | 16            | 100          | 111           | 29                 | 380         | 351        | 391          |
| September             | 2017 | 10           | 8               | 7               | 15              | 12               | 16               | 16            | 16            | 100          | 98            | 31                 | 343         | 312        | 391          |
| October               | 2017 | 10           | 8               | 8               | 13              | 11               | 15               | 18            | 16            | 100          | 102           | 30                 | 373         | 343        | 428          |
| November              | 2017 | 10           | 9               | 9               | 14              | 12               | 16               | 19            | 11            | 100          | 100           | 30                 | 376         | 346        | 426          |
| December              | 2017 | 11           | 10              | 9               | 13              | 11               | 15               | 20            | 11            | 100          | 104           | 26                 | 411         | 385        | 441          |
|                       |      |              |                 |                 |                 |                  |                  |               |               |              |               |                    |             |            |              |
| January               | 2018 | 12           | 12              | 7               | 12              | 12               | 15               | 17            | 13            | 100          | 97            | 22                 | 344         | 323        | 431          |
| February              | 2018 | 10           | 10              | 7               | 11              | 12               | 15               | 17            | 18            | 100          | 102           | 27                 | 382         | 356        | 432          |
| March                 | 2018 | 10           | 10              | 7               | 11              | 12               | 15               | 16            | 18            | 100          | 100           | 28                 | 356         | 328        | 418          |
| April                 | 2018 | 8            | 9               | 9               | 12              | 12               | 15               | 18            | 18            | 100          | 108           | 34                 | 403         | 369        | 414          |
| May                   | 2018 | 9            | 11              | 9               | 13              | 10               | 16               | 17            | 16            | 100          | 97            | 28                 | 373         | 345        | 411          |