

TABLE 21

CURRENT VALUE OF STOCK MARKET INVESTMENTS

"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	
January	1990	37	20	13	7	3	2	2	16	100	10	5	36	31	327
February	1990	32	18	12	12	7	5	0	14	100	17	5	55	50	361
March	1990	33	20	9	9	7	2	0	20	100	10	4	38	33	369
April	1990	34	13	13	9	6	3	2	20	100	12	4	47	43	352
July	1997	15	14	15	15	12	9	5	15	100	43	15	103	87	207
August	1997	16	12	13	17	13	7	4	18	100	48	18	109	92	193
September	1997	11	17	11	19	16	7	6	13	100	57	17	125	107	182
December	1997	11	16	10	12	14	10	6	21	100	54	17	148	131	199
January	1998	15	14	15	13	11	6	2	24	100	36	13	91	78	200
February	1998	12	11	13	11	14	8	9	22	100	50	19	159	140	202
September	1998	16	11	12	14	12	10	6	19	100	51	12	153	140	230
October	1998	15	15	11	13	13	9	4	20	100	45	13	138	125	223
November	1998	13	11	11	18	13	12	5	17	100	63	19	140	122	237
December	1998	14	15	16	12	12	12	4	15	100	39	15	109	93	253
January	1999	17	14	14	13	11	10	6	15	100	41	10	114	103	244
February	1999	13	10	14	13	11	12	5	22	100	51	19	141	122	231
March	1999	13	10	13	17	13	7	3	24	100	50	20	104	84	222
April	1999	11	13	14	12	15	9	5	21	100	48	18	135	117	224
May	1999	8	8	15	17	14	10	9	19	100	65	32	174	143	238
June	1999	14	12	11	16	14	8	7	18	100	51	16	122	106	234
July	1999	16	15	10	14	11	10	9	15	100	52	11	159	148	237
August	1999	12	14	14	10	13	14	4	19	100	44	18	155	137	236
September	1999	9	14	10	16	13	15	5	18	100	64	21	162	141	229
October	1999	13	13	8	18	13	12	7	16	100	58	18	157	140	234
November	1999	11	12	12	13	13	12	10	17	100	58	20	198	178	227
December	1999	11	7	15	8	18	9	10	22	100	79	25	167	142	223
January	2000	14	12	15	9	9	15	6	20	100	44	17	198	181	245
February	2000	6	12	13	12	12	13	8	24	100	71	24	204	180	238
March	2000	6	15	13	13	15	11	7	20	100	73	22	151	130	240
April	2000	16	7	9	11	11	15	8	23	100	73	15	205	190	249
May	2000	8	14	11	14	10	10	8	25	100	56	20	155	136	270
June	2000	13	9	9	12	12	15	7	23	100	65	17	203	185	244
July	2000	9	10	12	14	14	12	4	25	100	67	25	158	134	235
August	2000	10	8	13	10	16	15	12	16	100	97	29	222	193	250
September	2000	11	15	8	13	13	11	6	23	100	62	18	159	141	240
October	2000	15	13	9	9	13	11	7	23	100	49	11	156	145	229
November	2000	10	12	10	14	14	13	4	23	100	68	20	161	141	255
December	2000	8	16	9	12	11	13	9	22	100	61	18	196	178	196
January	2001	10	13	11	15	12	11	6	22	100	56	19	150	131	244
February	2001	9	10	12	13	13	15	9	19	100	74	25	214	189	252
March	2001	11	14	11	10	16	13	5	20	100	56	17	155	138	273
April	2001	9	15	11	15	10	11	6	23	100	52	18	155	137	277
May	2001	9	12	12	12	11	10	6	28	100	52	16	155	139	284
June	2001	9	15	10	8	13	12	7	26	100	62	18	180	163	239
July	2001	6	13	12	12	9	11	7	30	100	64	21	193	172	240

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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>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>	
August	2001	11	10	10	17	8	12	6	26	100	55	20	159	139	269
September	2001	11	9	12	11	11	10	5	31	100	51	18	149	131	264
October	2001	10	10	10	14	10	12	6	28	100	52	20	186	166	252
November	2001	8	10	4	14	11	13	8	32	100	81	21	246	225	263
December	2001	10	12	13	14	13	8	4	26	100	55	19	146	127	259
January	2002	11	14	14	9	9	8	9	26	100	42	17	145	128	279
February	2002	5	13	16	11	12	13	6	24	100	60	23	192	169	278
March	2002	11	14	12	10	15	11	5	22	100	52	18	148	129	259
April	2002	12	9	12	9	15	13	6	24	100	73	20	191	171	278
May	2002	8	11	16	14	13	14	5	19	100	73	25	154	128	275
June	2002	11	17	10	14	10	10	7	21	100	49	16	154	138	282
July	2002	14	12	10	14	14	10	5	21	100	51	14	148	134	274
August	2002	11	14	15	13	11	12	4	20	100	46	18	137	119	279
September	2002	13	11	14	15	13	13	3	18	100	50	19	149	130	277
October	2002	15	9	11	15	11	13	6	20	100	57	19	151	132	270
November	2002	10	17	11	11	14	11	7	19	100	50	17	152	135	260
December	2002	12	15	12	13	12	8	5	23	100	46	16	125	109	292
January	2003	15	14	11	13	13	13	4	17	100	50	13	142	130	247
February	2003	14	11	17	12	11	9	4	22	100	40	16	103	87	261
March	2003	9	16	10	12	13	14	7	19	100	59	18	179	161	280
April	2003	16	15	13	12	11	7	5	21	100	36	10	107	97	295
June	2003	19	16	15	12	11	7	5	15	100	36	10	101	90	309
July	2003	16	14	12	16	11	10	6	15	100	48	13	103	91	294
August	2003	16	17	13	13	7	12	3	19	100	40	10	117	107	305
September	2003	16	14	15	9	11	10	7	18	100	39	15	137	123	313
October	2003	13	17	11	14	11	11	3	20	100	45	13	105	91	299
November	2003	13	16	12	14	10	11	7	17	100	50	17	150	133	345
December	2003	17	12	15	13	12	8	6	17	100	40	12	137	125	330
January	2004	13	18	12	15	9	11	7	15	100	44	15	137	122	321
February	2004	15	17	11	13	10	12	5	17	100	40	10	136	126	328
March	2004	17	13	9	16	11	12	6	16	100	52	14	152	138	309
April	2004	14	15	12	14	16	9	5	15	100	49	12	110	98	324
May	2004	11	10	13	18	12	11	8	17	100	61	23	159	136	319
June	2004	11	12	14	12	13	13	9	16	100	54	20	199	179	346
July	2004	13	16	12	14	12	12	4	17	100	49	15	139	124	331
August	2004	12	13	13	19	12	9	7	15	100	50	19	123	104	338
September	2004	16	11	9	13	14	13	7	17	100	60	10	172	161	329
October	2004	14	13	11	18	12	11	5	16	100	52	18	145	128	337
November	2004	16	10	12	13	13	12	6	18	100	53	14	155	140	324
December	2004	12	14	13	10	12	14	7	18	100	50	18	194	176	339
January	2005	15	16	10	15	11	11	7	15	100	49	15	140	125	319
February	2005	15	12	13	15	13	9	5	18	100	50	17	140	123	341
March	2005	13	16	9	15	12	11	5	19	100	49	15	148	133	324
April	2005	16	10	11	14	13	15	5	16	100	52	13	163	150	322
May	2005	10	17	16	14	12	11	4	16	100	42	15	138	122	339
June	2005	15	11	13	11	16	13	7	14	100	54	18	156	138	329
July	2005	15	13	12	13	13	12	5	17	100	50	15	149	134	321
August	2005	17	10	13	12	11	14	7	16	100	51	15	192	177	339
September	2005	14	12	13	13	13	13	7	15	100	51	17	157	139	344
October	2005	15	13	10	16	13	13	6	14	100	54	15	152	138	329
November	2005	16	12	15	17	13	10	4	13	100	48	14	104	90	329
December	2005	14	12	9	12	16	11	8	18	100	53	16	155	140	337

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Date of Survey		Under	\$10k	\$25k	\$50k	\$100k	\$200k	\$500k	DK, NA	Total	Median	Percentiles			Cases
		\$10k	to \$24k	to \$49k	to \$99k	to \$199k	to \$499k	and up			1000's	25th	75th	Rng	
January	2006	13	11	13	17	10	12	6	18	100	50	19	155	136	331
February	2006	14	10	11	14	12	15	9	15	100	67	19	207	188	320
March	2006	13	13	8	14	12	15	9	16	100	60	18	198	180	308
April	2006	11	13	17	11	15	12	5	16	100	50	18	150	132	315
May	2006	9	14	11	16	13	13	6	18	100	52	21	152	131	321
June	2006	13	13	8	15	14	15	7	15	100	75	19	192	173	317
July	2006	11	13	11	18	11	8	9	19	100	53	20	148	128	322
August	2006	7	11	12	16	16	14	9	15	100	79	25	195	170	315
September	2006	15	11	9	12	12	13	9	19	100	61	16	197	181	324
October	2006	12	11	11	12	15	14	8	17	100	71	20	198	177	324
November	2006	8	11	15	16	11	12	10	17	100	62	25	202	177	317
December	2006	11	9	13	12	12	14	8	21	100	63	24	198	175	318
January	2007	11	15	10	15	15	13	9	12	100	61	20	192	172	347
February	2007	9	15	13	16	13	9	9	16	100	57	20	146	126	350
March	2007	14	11	13	12	14	12	9	15	100	59	18	191	173	339
April	2007	11	11	10	12	16	16	9	15	100	90	22	201	179	334
May	2007	11	9	12	16	12	17	12	11	100	77	24	241	216	326
June	2007	9	11	12	16	15	12	9	16	100	71	26	193	167	332
July	2007	8	13	11	13	11	17	8	19	100	71	22	245	223	324
August	2007	9	16	14	9	13	14	9	16	100	53	20	200	180	322
September	2007	9	9	14	13	12	17	8	18	100	74	25	221	196	328
October	2007	13	12	11	13	12	14	11	14	100	61	20	202	182	336
November	2007	12	13	9	13	15	12	9	17	100	61	17	186	169	336
December	2007	11	9	12	11	16	15	9	17	100	87	24	209	185	325
January	2008	10	12	9	15	11	13	8	22	100	62	20	231	211	312
February	2008	11	10	15	12	10	17	9	16	100	62	22	210	188	327
March	2008	9	11	15	12	12	12	9	20	100	57	22	204	182	337
April	2008	12	12	11	15	12	15	7	16	100	56	20	202	182	326
May	2008	13	8	9	16	14	13	9	18	100	72	24	205	182	324
June	2008	13	12	10	14	13	14	8	16	100	64	18	197	179	331
July	2008	11	11	12	15	14	14	7	16	100	60	20	194	174	306
August	2008	11	8	9	14	12	19	10	17	100	85	27	236	208	354
September	2008	9	12	14	17	13	13	11	11	100	68	25	196	171	342
October	2008	12	8	13	16	17	12	7	15	100	69	24	153	129	331
November	2008	12	9	12	14	15	12	9	17	100	71	22	184	163	342
December	2008	11	18	9	13	13	11	9	16	100	53	17	154	136	340
January	2009	12	14	9	16	12	12	5	20	100	53	19	154	134	317
February	2009	15	10	12	15	10	15	7	16	100	57	17	197	180	343
March	2009	14	11	14	12	15	11	8	15	100	59	20	159	140	356
April	2009	12	12	12	14	14	12	9	15	100	58	19	182	163	334
May	2009	13	11	10	15	15	13	9	14	100	72	19	192	172	339
June	2009	11	11	17	13	13	11	10	14	100	52	21	175	154	350
July	2009	13	11	14	10	12	15	9	16	100	60	19	199	179	308
August	2009	12	10	13	17	12	9	9	18	100	59	21	153	133	351
September	2009	8	11	12	14	14	16	8	17	100	74	25	223	198	339
October	2009	11	11	10	11	15	14	12	16	100	78	21	214	193	339
November	2009	11	11	11	13	11	14	10	19	100	73	20	211	191	332
December	2009	9	11	10	16	14	15	10	15	100	80	26	200	174	331
January	2010	11	14	14	9	12	16	10	14	100	64	19	209	189	313
February	2010	9	13	13	17	13	12	7	16	100	58	20	154	133	328
March	2010	11	10	9	16	12	17	9	16	100	81	23	244	221	330

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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>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>	
April	2010	7	9	12	12	16	18	11	15	100	101	31	251	220	332
May	2010	6	10	10	18	16	14	7	19	100	82	30	194	164	323
June	2010	6	10	14	14	16	14	10	16	100	82	30	197	167	334
July	2010	12	12	10	8	15	15	10	18	100	79	19	217	198	321
August	2010	12	10	9	14	14	17	10	14	100	79	21	245	224	325
September	2010	10	15	8	14	12	15	9	17	100	72	19	201	182	325
October	2010	8	10	8	16	15	16	12	15	100	96	32	270	238	348
November	2010	8	9	10	14	19	15	10	15	100	98	37	211	174	345
December	2010	6	11	13	13	14	14	12	17	100	80	29	231	202	329
January	2011	7	8	14	11	15	17	10	18	100	98	30	275	245	326
February	2011	9	11	6	18	14	15	11	16	100	93	31	254	223	314
March	2011	8	11	9	14	16	17	9	16	100	96	28	212	184	320
April	2011	9	12	10	14	12	16	11	16	100	83	23	255	232	344
May	2011	7	11	10	14	15	16	10	17	100	99	30	243	213	324
June	2011	9	11	12	12	12	18	10	16	100	80	26	278	252	333
July	2011	8	12	11	10	14	15	13	17	100	96	25	293	268	296
August	2011	8	10	8	16	16	17	11	14	100	100	33	208	175	322
September	2011	4	9	10	16	14	17	11	19	100	101	38	276	238	318
October	2011	10	11	12	11	16	12	11	17	100	72	21	200	179	337
November	2011	7	11	10	13	17	14	10	18	100	96	30	201	171	328
December	2011	6	7	13	16	13	18	11	16	100	99	38	250	212	307
January	2012	7	9	11	13	10	18	9	23	100	83	31	209	179	324
February	2012	10	9	11	16	13	12	13	16	100	79	27	208	181	319
March	2012	10	8	13	13	14	17	10	15	100	89	30	202	171	315
April	2012	8	10	10	18	14	15	9	16	100	80	28	213	185	320
May	2012	8	10	10	13	16	17	13	13	100	97	32	294	262	326
June	2012	7	9	10	11	17	18	12	16	100	106	36	276	240	302
July	2012	4	8	9	14	16	18	11	20	100	119	44	232	188	337
August	2012	5	6	7	19	15	14	16	18	100	103	50	298	248	319
September	2012	6	9	6	12	16	20	15	16	100	126	46	302	256	317
October	2012	7	10	8	18	15	14	14	14	100	95	37	252	216	323
November	2012	9	6	10	19	11	14	12	19	100	76	31	255	224	309
December	2012	6	9	9	11	14	21	12	18	100	104	35	308	273	311
January	2013	6	10	10	14	17	15	12	16	100	97	39	245	206	318
February	2013	6	7	10	14	13	17	15	18	100	105	38	320	282	295
March	2013	10	10	8	11	12	17	13	19	100	99	26	300	275	301
April	2013	7	11	8	17	11	15	12	19	100	81	27	243	216	308
May	2013	10	7	7	14	14	17	15	16	100	100	36	373	337	317
June	2013	11	11	10	10	16	15	13	14	100	96	20	248	228	303
July	2013	7	8	8	18	17	15	12	15	100	100	39	240	201	335
August	2013	8	8	6	17	14	16	18	13	100	102	48	364	316	305
September	2013	6	10	9	15	11	18	14	17	100	99	32	320	288	319
October	2013	8	10	8	12	14	15	14	19	100	101	28	312	284	319
November	2013	8	7	8	15	11	16	15	20	100	101	39	355	317	321
December	2013	8	8	7	12	14	17	13	21	100	104	36	300	264	338
January	2014	10	9	6	12	16	15	16	16	100	110	30	356	326	340
February	2014	9	8	7	13	12	20	16	15	100	123	38	303	265	327
March	2014	9	11	8	13	15	13	13	18	100	98	24	252	228	341
April	2014	9	6	10	11	12	21	15	16	100	146	39	304	265	321
May	2014	7	13	9	12	11	18	12	18	100	97	29	256	228	346
June	2014	10	8	11	11	15	14	16	15	100	101	33	296	264	345
July	2014	14	8	7	12	12	17	15	15	100	99	21	346	326	352

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Date of Survey		Under	\$10k	\$25k	\$50k	\$100k	\$200k	\$500k	DK, NA	Total	Median	Percentiles			Cases
		\$10k	to \$24k	to \$49k	to \$99k	to \$199k	to \$499k	and up			1000's	25th	75th	Rng	
August	2014	12	10	8	7	10	21	16	16	100	116	21	375	355	323
September	2014	10	8	7	15	14	18	16	12	100	102	39	316	277	330
October	2014	9	9	11	13	14	18	14	12	100	97	28	295	267	313
November	2014	10	6	8	11	13	18	13	21	100	104	33	310	277	333
December	2014	11	8	8	10	13	16	15	19	100	103	30	309	279	335
January	2015	10	9	8	13	13	18	17	12	100	103	34	347	313	330
February	2015	9	10	8	11	14	13	18	17	100	104	32	392	360	322
March	2015	10	9	8	15	12	15	17	14	100	98	32	343	311	320
April	2015	10	10	6	8	17	21	14	14	100	146	30	317	288	322
May	2015	8	9	10	15	15	16	13	14	100	98	31	262	231	306
June	2015	10	10	8	13	13	19	16	11	100	104	33	304	272	313
July	2015	10	8	12	13	14	13	17	13	100	96	30	306	276	333
August	2015	6	10	9	10	14	18	17	16	100	147	32	384	352	369
September	2015	10	10	5	18	12	18	13	14	100	99	34	299	265	321
October	2015	13	8	8	7	11	23	17	13	100	149	26	372	346	344
November	2015	8	13	10	9	16	16	15	13	100	103	26	307	281	327
December	2015	10	10	10	12	12	17	16	13	100	101	26	308	282	315
January	2016	10	9	10	13	14	18	14	12	100	97	30	265	235	322
February	2016	12	8	15	10	12	16	13	14	100	71	24	252	228	320
March	2016	12	8	9	15	10	17	15	14	100	91	29	302	274	336
April	2016	11	9	7	11	16	22	13	11	100	136	30	299	269	344
May	2016	10	8	10	11	13	19	15	14	100	110	31	314	284	367
June	2016	10	11	7	14	14	15	16	13	100	96	28	286	258	339
July	2016	13	9	11	11	17	14	15	10	100	91	26	257	231	356
August	2016	8	6	11	17	17	15	14	12	100	96	38	245	207	361
September	2016	12	9	9	13	16	16	15	10	100	98	25	258	233	378
October	2016	8	12	6	13	15	16	17	13	100	108	30	393	364	371
November	2016	10	8	11	13	14	19	13	12	100	101	30	297	267	375
December	2016	8	9	11	14	14	16	15	13	100	98	31	295	264	399
January	2017	9	11	11	12	12	17	16	12	100	97	29	316	287	395
February	2017	13	11	6	14	16	16	16	8	100	99	21	299	277	406
March	2017	9	7	11	12	14	18	14	15	100	105	38	310	272	386
April	2017	10	11	6	14	12	14	19	14	100	99	24	388	364	396
May	2017	8	10	9	15	13	15	17	13	100	97	30	307	277	422
June	2017	9	8	9	11	13	16	20	14	100	113	30	400	369	405
July	2017	11	9	8	14	12	15	17	14	100	99	30	359	328	402
August	2017	11	7	8	11	14	16	18	15	100	104	32	366	334	398
September	2017	6	9	8	13	13	17	16	18	100	104	39	304	265	412
October	2017	9	10	8	14	11	15	20	13	100	102	30	413	383	415
November	2017	11	10	8	10	13	17	19	12	100	118	29	389	360	411
December	2017	11	9	8	11	13	15	21	12	100	102	29	397	368	429