# 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 25th | Percentiles 75th | Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 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 |

# TABLE 21

## CURRENT VALUE OF STOCK MARKET INVESTMENTS

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Percentiles Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 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 |

# TABLE 21

## CURRENT VALUE OF STOCK MARKET INVESTMENTS

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| January | 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 |

# TABLE 21

## CURRENT VALUE OF STOCK MARKET INVESTMENTS

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Percentiles Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 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 |

# TABLE 21

## CURRENT VALUE OF STOCK MARKET INVESTMENTS

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Percentiles Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 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 |
| January | 2018 | 14 | 10 | 8 | 10 | 12 | 15 | 16 | 15 | 100 | 96 | 20 | 307 | 287 | 408 |
| February | 2018 | 10 | 8 | 6 | 11 | 12 | 16 | 22 | 15 | 100 | 125 | 32 | 499 | 468 | 408 |
| March | 2018 | 6 | 10 | 9 | 11 | 14 | 17 | 17 | 16 | 100 | 104 | 34 | 376 | 342 | 436 |
| April | 2018 | 9 | 10 | 7 | 13 | 12 | 18 | 19 | 12 | 100 | 108 | 31 | 397 | 366 | 420 |
| May | 2018 | 8 | 12 | 7 | 12 | 10 | 19 | 18 | 14 | 100 | 104 | 27 | 402 | 376 | 403 |
| June | 2018 | 8 | 11 | 9 | 13 | 13 | 15 | 19 | 12 | 100 | 100 | 31 | 345 | 314 | 420 |
| July | 2018 | 12 | 7 | 7 | 14 | 13 | 16 | 18 | 13 | 100 | 101 | 30 | 355 | 325 | 409 |
| August | 2018 | 8 | 6 | 8 | 11 | 13 | 15 | 21 | 18 | 100 | 147 | 39 | 488 | 448 | 398 |
| September | 2018 | 10 | 8 | 7 | 11 | 14 | 17 | 19 | 14 | 100 | 109 | 33 | 396 | 364 | 446 |
| October | 2018 | 8 | 8 | 10 | 9 | 13 | 17 | 22 | 13 | 100 | 148 | 31 | 468 | 437 | 435 |
| November | 2018 | 9 | 9 | 9 | 14 | 13 | 16 | 18 | 12 | 100 | 102 | 31 | 378 | 347 | 418 |

# TABLE 21

## CURRENT VALUE OF STOCK MARKET INVESTMENTS

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Percentiles Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| December | 2018 | 11 | 10 | 8 | 13 | 12 | 17 | 16 | 13 | 100 | 99 | 28 | 315 | 287 | 427 |
| January | 2019 | 10 | 7 | 9 | 11 | 11 | 19 | 20 | 13 | 100 | 148 | 33 | 412 | 379 | 427 |
| February | 2019 | 8 | 9 | 6 | 13 | 15 | 16 | 18 | 15 | 100 | 111 | 40 | 382 | 342 | 416 |
| March | 2019 | 9 | 9 | 8 | 11 | 13 | 18 | 19 | 13 | 100 | 120 | 34 | 416 | 382 | 433 |
| April | 2019 | 11 | 9 | 7 | 10 | 13 | 16 | 22 | 12 | 100 | 146 | 32 | 459 | 427 | 414 |
| May | 2019 | 7 | 13 | 7 | 12 | 12 | 19 | 20 | 10 | 100 | 129 | 29 | 396 | 367 | 403 |
| June | 2019 | 8 | 10 | 6 | 10 | 13 | 17 | 20 | 16 | 100 | 142 | 33 | 417 | 384 | 412 |
| July | 2019 | 9 | 8 | 7 | 15 | 13 | 18 | 19 | 11 | 100 | 119 | 42 | 368 | 326 | 404 |
| August | 2019 | 10 | 6 | 7 | 11 | 12 | 18 | 22 | 14 | 100 | 150 | 41 | 479 | 438 | 402 |
| September | 2019 | 9 | 7 | 8 | 10 | 11 | 16 | 23 | 16 | 100 | 153 | 37 | 512 | 475 | 425 |
| October | 2019 | 13 | 9 | 7 | 10 | 16 | 13 | 18 | 14 | 100 | 102 | 21 | 376 | 355 | 448 |
| November | 2019 | 9 | 7 | 9 | 11 | 10 | 17 | 23 | 14 | 100 | 151 | 37 | 476 | 440 | 454 |
| December | 2019 | 13 | 8 | 8 | 9 | 13 | 16 | 21 | 12 | 100 | 109 | 26 | 418 | 392 | 441 |
| January | 2020 | 9 | 8 | 8 | 13 | 14 | 17 | 21 | 10 | 100 | 121 | 37 | 408 | 372 | 439 |
| February | 2020 | 11 | 8 | 5 | 11 | 11 | 19 | 22 | 13 | 100 | 158 | 39 | 492 | 453 | 458 |
| March | 2020 | 11 | 8 | 6 | 9 | 9 | 20 | 20 | 17 | 100 | 156 | 30 | 422 | 392 | 489 |
| April | 2020 | 11 | 12 | 8 | 12 | 9 | 16 | 17 | 15 | 100 | 90 | 20 | 319 | 299 | 437 |
| May | 2020 | 11 | 9 | 8 | 11 | 10 | 17 | 18 | 16 | 100 | 103 | 26 | 410 | 384 | 461 |
| June | 2020 | 13 | 10 | 8 | 8 | 12 | 18 | 20 | 11 | 100 | 116 | 21 | 375 | 354 | 432 |
| July | 2020 | 11 | 9 | 5 | 13 | 14 | 16 | 17 | 15 | 100 | 102 | 28 | 384 | 356 | 431 |
| August | 2020 | 12 | 9 | 8 | 11 | 12 | 16 | 21 | 11 | 100 | 115 | 25 | 422 | 397 | 485 |
| September | 2020 | 13 | 7 | 8 | 11 | 12 | 15 | 21 | 13 | 100 | 109 | 27 | 413 | 385 | 438 |
| October | 2020 | 10 | 8 | 10 | 9 | 11 | 17 | 20 | 15 | 100 | 122 | 32 | 412 | 380 | 434 |
| November | 2020 | 9 | 9 | 7 | 13 | 11 | 16 | 21 | 14 | 100 | 121 | 33 | 463 | 431 | 445 |
| December | 2020 | 13 | 6 | 8 | 10 | 12 | 17 | 21 | 13 | 100 | 120 | 32 | 451 | 419 | 422 |
| January | 2021 | 9 | 10 | 7 | 6 | 14 | 17 | 21 | 16 | 100 | 148 | 33 | 477 | 444 | 406 |
| February | 2021 | 11 | 8 | 7 | 11 | 13 | 15 | 22 | 13 | 100 | 121 | 31 | 459 | 428 | 425 |
| March | 2021 | 12 | 5 | 9 | 11 | 11 | 15 | 22 | 15 | 100 | 121 | 30 | 480 | 449 | 425 |
| April | 2021 | 8 | 9 | 7 | 11 | 10 | 16 | 23 | 16 | 100 | 147 | 37 | 512 | 476 | 426 |
| May | 2021 | 12 | 7 | 8 | 9 | 8 | 16 | 25 | 15 | 100 | 153 | 29 | 528 | 499 | 429 |
| June | 2021 | 13 | 11 | 8 | 7 | 11 | 13 | 23 | 14 | 100 | 118 | 20 | 508 | 488 | 445 |
| July | 2021 | 10 | 8 | 6 | 9 | 12 | 19 | 18 | 18 | 100 | 147 | 30 | 408 | 378 | 406 |
| August | 2021 | 9 | 7 | 8 | 10 | 12 | 14 | 21 | 19 | 100 | 146 | 39 | 500 | 460 | 427 |
| September | 2021 | 13 | 7 | 7 | 10 | 10 | 14 | 22 | 17 | 100 | 126 | 26 | 513 | 487 | 429 |
| October | 2021 | 11 | 7 | 5 | 11 | 12 | 19 | 23 | 12 | 100 | 151 | 41 | 482 | 442 | 424 |
| November | 2021 | 9 | 9 | 7 | 13 | 12 | 12 | 23 | 15 | 100 | 118 | 31 | 492 | 461 | 441 |
| December | 2021 | 10 | 9 | 6 | 10 | 11 | 18 | 23 | 13 | 100 | 152 | 38 | 501 | 464 | 427 |
| January | 2022 | 11 | 8 | 7 | 7 | 11 | 16 | 22 | 18 | 100 | 144 | 30 | 495 | 465 | 438 |
| February | 2022 | 10 | 8 | 5 | 10 | 13 | 16 | 21 | 17 | 100 | 121 | 36 | 481 | 445 | 418 |
| March | 2022 | 8 | 8 | 9 | 10 | 13 | 15 | 21 | 16 | 100 | 144 | 35 | 423 | 388 | 438 |
| April | 2022 | 11 | 10 | 4 | 10 | 10 | 16 | 24 | 15 | 100 | 153 | 29 | 520 | 491 | 434 |
| May | 2022 | 10 | 5 | 7 | 11 | 12 | 15 | 24 | 16 | 100 | 152 | 44 | 493 | 448 | 430 |
| June | 2022 | 12 | 7 | 7 | 10 | 11 | 16 | 23 | 14 | 100 | 149 | 34 | 503 | 469 | 425 |
| July | 2022 | 10 | 10 | 9 | 11 | 9 | 15 | 18 | 18 | 100 | 101 | 25 | 384 | 359 | 430 |
| August | 2022 | 7 | 5 | 6 | 11 | 14 | 15 | 21 | 21 | 100 | 148 | 49 | 490 | 441 | 423 |
| September | 2022 | 9 | 13 | 8 | 12 | 11 | 15 | 17 | 15 | 100 | 95 | 24 | 354 | 330 | 422 |
| October | 2022 | 13 | 10 | 6 | 10 | 14 | 15 | 19 | 13 | 100 | 119 | 21 | 398 | 377 | 404 |
| November | 2022 | 10 | 9 | 6 | 15 | 12 | 18 | 17 | 13 | 100 | 103 | 30 | 361 | 331 | 432 |
| December | 2022 | 11 | 5 | 9 | 8 | 12 | 14 | 24 | 17 | 100 | 153 | 30 | 519 | 489 | 402 |
| January | 2023 | 8 | 9 | 7 | 8 | 12 | 17 | 24 | 15 | 100 | 163 | 33 | 526 | 493 | 401 |
| February | 2023 | 12 | 5 | 6 | 11 | 14 | 17 | 21 | 14 | 100 | 149 | 40 | 441 | 401 | 416 |

# TABLE 21

## CURRENT VALUE OF STOCK MARKET INVESTMENTS

| Date of Survey | | Under $10k | $10k to $24k | $25k to $49k | $50k to $99k | $100k to $199k | $200k to $499k | $500k and up | DK, NA | Total | Median 1000's | Percentiles 25th | Percentiles 75th | Rng | Cases |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| March | 2023 | 10 | 7 | 10 | 14 | 9 | 14 | 19 | 17 | 100 | 103 | 30 | 411 | 381 | 400 |
| April | 2023 | 10 | 10 | 10 | 7 | 11 | 18 | 19 | 15 | 100 | 129 | 25 | 402 | 377 | 418 |
| May | 2023 | 8 | 6 | 6 | 12 | 12 | 18 | 21 | 17 | 100 | 150 | 48 | 470 | 422 | 435 |
| June | 2023 | 11 | 8 | 7 | 8 | 10 | 17 | 23 | 16 | 100 | 150 | 29 | 510 | 481 | 396 |
| July | 2023 | 10 | 7 | 6 | 12 | 9 | 15 | 26 | 15 | 100 | 163 | 40 | 582 | 541 | 394 |
| August | 2023 | 7 | 6 | 9 | 12 | 12 | 17 | 21 | 16 | 100 | 151 | 45 | 479 | 434 | 418 |
| September | 2023 | 8 | 9 | 9 | 11 | 9 | 17 | 20 | 17 | 100 | 148 | 36 | 464 | 427 | 434 |
| October | 2023 | 10 | 9 | 7 | 10 | 11 | 16 | 23 | 14 | 100 | 145 | 30 | 498 | 468 | 407 |
| November | 2023 | 9 | 8 | 7 | 11 | 12 | 15 | 23 | 15 | 100 | 147 | 39 | 507 | 469 | 411 |
| December | 2023 | 11 | 8 | 6 | 11 | 11 | 17 | 23 | 13 | 100 | 153 | 33 | 502 | 469 | 433 |
| January | 2024 | 8 | 7 | 7 | 13 | 10 | 17 | 26 | 12 | 100 | 168 | 48 | 587 | 539 | 408 |
| February | 2024 | 11 | 6 | 7 | 13 | 10 | 16 | 22 | 15 | 100 | 148 | 38 | 491 | 453 | 409 |
| March | 2024 | 8 | 6 | 7 | 11 | 12 | 18 | 22 | 16 | 100 | 153 | 44 | 498 | 454 | 422 |
| April | 2024 | 10 | 7 | 7 | 9 | 11 | 15 | 25 | 16 | 100 | 152 | 37 | 600 | 562 | 565 |
| May | 2024 | 12 | 8 | 5 | 7 | 13 | 17 | 25 | 13 | 100 | 160 | 30 | 517 | 488 | 717 |
| June | 2024 | 9 | 9 | 3 | 10 | 13 | 15 | 30 | 11 | 100 | 196 | 51 | 624 | 572 | 708 |
| July | 2024 | 12 | 9 | 5 | 10 | 9 | 16 | 29 | 10 | 100 | 177 | 30 | 614 | 583 | 657 |
| August | 2024 | 8 | 8 | 7 | 9 | 13 | 15 | 30 | 10 | 100 | 198 | 41 | 712 | 670 | 851 |
| September | 2024 | 7 | 7 | 9 | 10 | 9 | 17 | 30 | 11 | 100 | 199 | 49 | 624 | 575 | 672 |
| October | 2024 | 8 | 5 | 6 | 10 | 12 | 17 | 30 | 12 | 100 | 207 | 50 | 607 | 557 | 685 |
| November | 2024 | 8 | 7 | 6 | 7 | 10 | 16 | 33 | 13 | 100 | 257 | 50 | 807 | 757 | 603 |
| December | 2024 | 7 | 4 | 4 | 11 | 10 | 15 | 30 | 19 | 100 | 221 | 54 | 810 | 756 | 611 |
| January | 2025 | 11 | 7 | 7 | 8 | 8 | 16 | 32 | 11 | 100 | 213 | 39 | 797 | 758 | 764 |
| February | 2025 | 8 | 7 | 8 | 7 | 13 | 15 | 32 | 10 | 100 | 198 | 41 | 798 | 757 | 700 |
| March | 2025 | 11 | 6 | 5 | 10 | 10 | 15 | 31 | 12 | 100 | 201 | 48 | 749 | 701 | 1071 |
| April | 2025 | 9 | 7 | 6 | 8 | 10 | 17 | 31 | 12 | 100 | 226 | 45 | 708 | 663 | 843 |
| May | 2025 | 9 | 6 | 6 | 7 | 11 | 17 | 33 | 11 | 100 | 252 | 59 | 804 | 745 | 841 |
| June | 2025 | 9 | 6 | 5 | 10 | 11 | 17 | 33 | 9 | 100 | 248 | 61 | 751 | 691 | 808 |
| July | 2025 | 9 | 6 | 4 | 8 | 12 | 15 | 35 | 11 | 100 | 257 | 60 | 964 | 903 | 964 |
| August | 2025 | 9 | 5 | 6 | 10 | 8 | 20 | 32 | 10 | 100 | 254 | 53 | 808 | 755 | 778 |
| September | 2025 | 8 | 6 | 5 | 9 | 10 | 17 | 35 | 10 | 100 | 275 | 61 | 942 | 880 | 949 |
| October | 2025 | 7 | 7 | 5 | 8 | 10 | 17 | 35 | 11 | 100 | 281 | 53 | 792 | 739 | 913 |
| November | 2025 | 9 | 5 | 5 | 7 | 10 | 19 | 36 | 9 | 100 | 303 | 60 | 922 | 862 | 861 |
| December | 2025 | 6 | 8 | 6 | 8 | 9 | 18 | 36 | 9 | 100 | 299 | 52 | 877 | 825 | 769 |
| January | 2026 | 10 | 7 | 4 | 10 | 12 | 15 | 33 | 9 | 100 | 203 | 53 | 799 | 747 | 965 |
| February | 2026 | 7 | 6 | 6 | 9 | 12 | 16 | 35 | 9 | 100 | 255 | 63 | 845 | 783 | 977 |
| March | 2026 | 8 | 5 | 6 | 10 | 10 | 18 | 35 | 8 | 100 | 258 | 62 | 824 | 762 | 1122 |
| April | 2026 | 7 | 9 | 6 | 8 | 10 | 16 | 34 | 10 | 100 | 246 | 49 | 903 | 855 | 898 |
| May | 2026 | 8 | 4 | 5 | 9 | 11 | 16 | 37 | 10 | 100 | 300 | 72 | 989 | 917 | 831 |
| June | 2026 | 9 | 5 | 7 | 9 | 10 | 16 | 34 | 10 | 100 | 247 | 50 | 844 | 794 | 1013 |
| July | 2026 | 9 | 5 | 5 | 8 | 12 | 17 | 34 | 10 | 100 | 250 | 61 | 908 | 847 | 937 |