

**TABLE 21**

**CURRENT VALUE OF STOCK MARKET INVESTMENTS**

**THREE MONTH MOVING AVERAGES**

	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024	Mar 2024	Apr 2024	May 2024
UNDER \$10,000	9%	10%	10%	9%	8%	8%	9%	10%	9%	10%	9%	10%	10%
\$10,000-24,999	8	8	7	7	7	8	9	8	8	7	6	6	7
\$25,000-49,999	9	8	6	7	8	8	8	7	7	7	7	7	6
\$50,000-99,999	11	9	11	11	12	11	11	11	12	12	12	11	9
\$100,000-199,999	11	11	10	10	10	11	11	11	11	10	11	11	12
\$200,000-499,999	17	18	17	16	16	17	16	16	16	17	17	16	17
\$500,000 AND UP	20	21	23	23	22	21	22	23	24	24	23	23	24
DK/NA	15	15	16	17	17	16	14	14	13	13	15	16	15
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100
CASES	1253	1249	1225	1208	1246	1259	1252	1251	1252	1250	1239	1396	1704
MEDIAN (1,000's)	127	143	154	155	154	148	147	148	156	156	156	151	155
25th PERCENTILE (1,000's)	35	34	39	38	41	37	35	34	40	40	43	40	37
75th PERCENTILE (1,000's)	428	460	520	524	508	480	490	503	532	527	526	530	538
INTERQUARTILE RANGE (75th-25th) (1,000's)	393	426	481	485	467	443	454	468	492	487	482	490	501

**CURRENT VALUE OF STOCK MARKET INVESTMENTS - MEDIAN  
THREE MONTH MOVING AVERAGES**

All	127	143	154	155	154	148	147	148	156	156	156	151	155
Age 18 to 44	53	51	61	54	57	54	50	46	56	57	69	59	56
Age 45 to 64	214	228	231	236	230	235	247	255	261	293	301	294	247
Age 65+	296	296	342	301	280	232	267	320	335	313	250	318	384
Income Bottom Third	42	30	27	36	35	43	34	37	36	41	47	41	31
Income Middle Third	73	83	94	80	73	67	77	90	99	87	94	108	119
Income Top Third	291	321	366	384	387	338	336	310	339	359	355	343	376
Educ High School or Less	56	46	62	56	61	68	76	84	79	79	65	52	56
Educ Some College	58	54	63	70	71	69	67	72	75	69	92	96	103
Educ College Degree	189	219	238	246	246	227	224	218	241	244	235	232	227
Democrat	173	175	187	198	222	191	201	178	213	208	212	208	192
Independent	96	114	117	127	108	114	95	115	108	102	92	108	141
Republican	151	172	203	184	164	139	145	159	167	180	196	184	169

The questions were: "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?"

CASES is the number of respondents who owned stock