

**TABLE 21**

**CURRENT VALUE OF STOCK MARKET INVESTMENTS**

**THREE MONTH MOVING AVERAGES**

	Jul 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2020	Dec 2020	Jan 2021	Feb 2021	Mar 2021	Apr 2021	May 2021	Jun 2021	Jul 2021
UNDER \$10,000	12%	12%	12%	12%	11%	11%	10%	11%	11%	10%	11%	11%	12%
\$10,000-24,999	9	9	8	8	8	8	8	8	8	7	7	9	9
\$25,000-49,999	7	7	7	9	8	8	7	7	8	8	8	8	7
\$50,000-99,999	11	11	12	10	11	11	10	9	9	11	10	9	8
\$100,000-199,999	12	13	13	12	11	11	12	13	13	11	10	10	10
\$200,000-499,999	17	17	16	16	16	17	17	16	16	15	16	15	16
\$500,000 AND UP	18	19	20	21	21	21	21	21	22	22	23	24	22
DK/NA	14	12	12	12	14	13	15	15	13	16	15	14	16
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100
CASES	1324	1348	1354	1357	1317	1301	1273	1253	1256	1276	1280	1300	1280
MEDIAN (1,000's)	107	111	109	115	117	121	130	130	130	130	141	140	139
25th PERCENTILE (1,000's)	25	25	27	28	31	32	32	32	31	33	32	28	26
75th PERCENTILE (1,000's)	390	394	406	415	429	442	464	462	472	484	506	516	481
INTERQUARTILE RANGE (75th-25th) (1,000's)	365	369	379	387	399	410	431	430	440	451	475	488	455

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

All	107	111	109	115	117	121	130	130	130	130	141	140	139
Age 18 to 44	44	41	38	35	40	43	46	41	47	50	53	43	42
Age 45 to 64	182	181	189	207	208	208	213	237	233	268	258	276	247
Age 65+	305	326	312	320	336	358	340	331	310	342	389	458	430
Income Bottom Third	24	30	32	28	29	27	32	30	30	27	22	21	16
Income Middle Third	71	73	78	79	81	77	83	82	84	79	83	90	90
Income Top Third	237	240	269	302	303	303	300	329	349	368	368	365	349
Educ High School or Less	53	58	57	53	51	50	49	55	59	66	63	58	58
Educ Some College	60	59	63	66	64	71	74	75	64	65	59	54	55
Educ College Degree	167	174	160	174	185	198	203	194	196	195	227	230	240

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