

TABLE 21

CURRENT VALUE OF STOCK MARKET INVESTMENTS

THREE MONTH MOVING AVERAGES

	Sep 2022	Oct 2022	Nov 2022	Dec 2022	Jan 2023	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023
UNDER \$10,000	9%	10%	11%	11%	10%	10%	10%	11%	9%	10%	10%	9%	8%
\$10,000-24,999	9	9	11	8	8	6	7	7	8	8	7	7	7
\$25,000-49,999	8	7	7	7	7	7	8	9	9	8	6	7	8
\$50,000-99,999	11	11	12	11	10	9	11	11	11	9	11	11	12
\$100,000-199,999	11	13	12	13	12	13	12	11	11	11	10	10	10
\$200,000-499,999	15	15	16	16	16	16	16	16	17	18	17	16	16
\$500,000 AND UP	19	19	18	20	22	23	21	20	20	21	23	23	22
DK/NA	18	16	13	14	15	16	15	15	15	15	16	17	17
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100
CASES	1275	1249	1258	1238	1235	1219	1217	1234	1253	1249	1225	1208	1246
MEDIAN (1,000's)	114	120	105	124	140	156	140	130	130	145	154	154	153
25th PERCENTILE (1,000's)	33	31	25	27	31	35	35	32	35	34	39	38	40
75th PERCENTILE (1,000's)	409	414	371	426	469	496	461	419	428	461	517	520	504
INTERQUARTILE RANGE (75th-25th) (1,000's)	377	383	346	399	438	461	426	387	393	427	478	482	464

CURRENT VALUE OF STOCK MARKET INVESTMENTS - MEDIAN

THREE MONTH MOVING AVERAGES

All	114	120	105	124	140	156	140	130	130	145	154	154	153
Age 18 to 44	52	58	50	44	39	40	45	44	53	51	61	54	57
Age 45 to 64	202	219	201	195	212	243	244	229	213	227	226	231	227
Age 65+	298	249	226	289	306	283	259	256	301	301	348	302	281
Income Bottom Third	28	29	21	20	22	22	32	35	42	30	26	36	35
Income Middle Third	68	78	78	92	100	95	80	61	72	82	93	80	76
Income Top Third	303	276	237	315	361	371	311	295	293	298	339	357	386
Educ High School or Less	46	44	48	49	71	65	68	43	56	46	61	55	60
Educ Some College	72	75	62	63	58	57	58	55	59	55	63	71	71
Educ College Degree	194	186	167	209	226	231	196	189	189	219	237	245	245
Democrat	132	121	108	136	165	181	185	174	174	174	181	192	218
Independent	88	97	87	90	95	108	99	95	97	114	117	126	108
Republican	158	167	150	171	179	168	147	124	151	179	208	189	162

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