

TABLE 21

CURRENT VALUE OF STOCK MARKET INVESTMENTS

THREE MONTH MOVING AVERAGES

	Feb 2025	Mar 2025	Apr 2025	May 2025	Jun 2025	Jul 2025	Aug 2025	Sep 2025	Oct 2025	Nov 2025	Dec 2025	Jan 2026	Feb 2026
UNDER \$10,000	9%	10%	9%	10%	9%	9%	9%	9%	8%	8%	7%	8%	8%
\$10,000-24,999	6	7	7	6	6	6	6	6	6	6	7	7	7
\$25,000-49,999	6	7	6	6	6	5	5	5	5	5	5	5	5
\$50,000-99,999	9	8	8	8	8	8	9	9	9	8	8	8	9
\$100,000-199,999	10	10	11	10	11	11	10	10	9	10	10	10	11
\$200,000-499,999	15	15	16	16	17	16	17	17	18	18	18	17	16
\$500,000 AND UP	31	32	31	32	32	34	33	34	34	35	36	35	35
DK/NA	14	11	12	12	11	11	11	10	11	10	9	10	9
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100
CASES	2075	2535	2614	2755	2492	2613	2550	2691	2640	2723	2543	2595	2711
MEDIAN (1,000's)	211	204	208	226	242	252	253	262	270	287	294	268	252
25th PERCENTILE (1,000's)	45	43	45	51	55	60	58	58	56	58	55	55	56
75th PERCENTILE (1,000's)	802	782	752	754	754	840	841	904	847	885	864	866	841
INTERQUARTILE RANGE (75th-25th) (1,000's)	757	739	707	703	700	780	783	846	792	827	809	811	785

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

All	211	204	208	226	242	252	253	262	270	287	294	268	252
Age 18 to 44	87	83	84	88	88	96	93	118	121	125	114	107	104
Age 45 to 64	329	276	260	286	299	332	335	336	324	331	335	343	330
Age 65+	428	396	449	512	520	495	485	480	482	495	503	497	491
Income Bottom Third	51	47	49	47	59	67	70	71	72	76	83	75	79
Income Middle Third	121	118	136	170	184	199	181	182	182	202	203	187	176
Income Top Third	567	553	515	503	503	602	602	681	587	620	577	608	620
Educ High School or Less	117	84	84	84	97	117	146	135	120	68	123	114	141
Educ Some College	77	78	78	90	107	114	103	87	93	102	126	124	117
Educ College Degree	306	304	295	297	300	330	339	372	381	404	384	345	331
Democrat	232	254	226	250	252	265	271	288	295	295	278	251	236
Independent	183	160	171	165	186	200	231	229	231	262	294	274	247
Republican	274	228	244	315	314	333	274	287	289	316	387	392	366

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