

# REGION WEST

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## TABLE 21 CURRENT VALUE OF STOCK MARKET INVESTMENTS (Three Month Moving Averages)

"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<br>\$10k | \$10k<br>to \$24k | \$25k<br>to \$49k | \$50k<br>to \$99k | \$100k<br>to \$199k | \$200k<br>to \$499k | \$500k<br>and up | DK, NA | Total | Median<br>1000's | Percentiles |      |     | Cases |
|----------------|------|----------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------------|--------|-------|------------------|-------------|------|-----|-------|
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  | 25th        | 75th | Rng |       |
| March          | 1990 | 39             | 20                | 15                | 6                 | 5                   | 4                   | 0                | 11     | 100   | 13               | 4           | 37   | 33  | 207   |
| April          | 1990 | 35             | 18                | 16                | 6                 | 6                   | 5                   | 1                | 13     | 100   | 15               | 5           | 41   | 36  | 190   |
| September      | 1997 | 15             | 16                | 10                | 15                | 21                  | 9                   | 7                | 7      | 100   | 61               | 17          | 152  | 134 | 107   |
| February       | 1998 | 10             | 15                | 12                | 10                | 21                  | 6                   | 5                | 20     | 100   | 59               | 17          | 142  | 125 | 109   |
| November       | 1998 | 17             | 5                 | 11                | 18                | 13                  | 13                  | 6                | 17     | 100   | 65               | 19          | 163  | 145 | 143   |
| December       | 1998 | 12             | 6                 | 14                | 19                | 12                  | 18                  | 4                | 15     | 100   | 66               | 28          | 184  | 157 | 156   |
| January        | 1999 | 10             | 9                 | 16                | 19                | 11                  | 17                  | 5                | 14     | 100   | 59               | 26          | 173  | 148 | 160   |
| February       | 1999 | 9              | 11                | 15                | 17                | 9                   | 17                  | 6                | 17     | 100   | 64               | 24          | 199  | 176 | 161   |
| March          | 1999 | 10             | 12                | 12                | 14                | 11                  | 11                  | 8                | 23     | 100   | 65               | 19          | 182  | 163 | 154   |
| April          | 1999 | 9              | 15                | 10                | 11                | 12                  | 10                  | 7                | 24     | 100   | 63               | 18          | 174  | 155 | 159   |
| May            | 1999 | 9              | 12                | 11                | 14                | 15                  | 10                  | 9                | 20     | 100   | 56               | 23          | 180  | 156 | 166   |
| June           | 1999 | 11             | 12                | 14                | 16                | 13                  | 10                  | 11               | 14     | 100   | 53               | 24          | 182  | 158 | 166   |
| July           | 1999 | 12             | 10                | 14                | 15                | 14                  | 9                   | 13               | 12     | 100   | 55               | 22          | 192  | 170 | 162   |
| August         | 1999 | 12             | 10                | 14                | 14                | 14                  | 9                   | 11               | 16     | 100   | 58               | 22          | 174  | 152 | 159   |
| September      | 1999 | 8              | 12                | 11                | 12                | 16                  | 14                  | 11               | 16     | 100   | 76               | 26          | 221  | 195 | 158   |
| October        | 1999 | 8              | 14                | 9                 | 15                | 14                  | 18                  | 7                | 14     | 100   | 74               | 27          | 210  | 183 | 160   |
| November       | 1999 | 8              | 16                | 10                | 14                | 15                  | 18                  | 9                | 10     | 100   | 77               | 28          | 215  | 187 | 150   |
| December       | 1999 | 12             | 13                | 9                 | 14                | 16                  | 12                  | 10               | 13     | 100   | 70               | 24          | 204  | 179 | 142   |
| January        | 2000 | 12             | 8                 | 10                | 11                | 18                  | 12                  | 13               | 17     | 100   | 90               | 26          | 221  | 194 | 137   |
| February       | 2000 | 12             | 9                 | 6                 | 13                | 17                  | 11                  | 10               | 23     | 100   | 89               | 23          | 197  | 174 | 141   |
| March          | 2000 | 8              | 12                | 9                 | 14                | 16                  | 15                  | 8                | 19     | 100   | 90               | 26          | 204  | 178 | 152   |
| April          | 2000 | 11             | 10                | 12                | 13                | 15                  | 14                  | 6                | 19     | 100   | 68               | 21          | 191  | 170 | 146   |
| May            | 2000 | 11             | 10                | 14                | 12                | 12                  | 15                  | 9                | 17     | 100   | 65               | 20          | 243  | 222 | 150   |
| June           | 2000 | 14             | 11                | 10                | 9                 | 9                   | 16                  | 8                | 23     | 100   | 68               | 16          | 277  | 260 | 138   |
| July           | 2000 | 8              | 11                | 8                 | 12                | 14                  | 16                  | 8                | 24     | 100   | 89               | 29          | 283  | 254 | 149   |
| August         | 2000 | 9              | 11                | 10                | 9                 | 17                  | 17                  | 6                | 21     | 100   | 90               | 28          | 254  | 226 | 147   |
| September      | 2000 | 10             | 11                | 14                | 10                | 17                  | 13                  | 5                | 19     | 100   | 68               | 28          | 169  | 141 | 164   |
| October        | 2000 | 12             | 11                | 15                | 8                 | 14                  | 13                  | 7                | 20     | 100   | 66               | 21          | 217  | 197 | 153   |
| November       | 2000 | 14             | 8                 | 14                | 10                | 12                  | 12                  | 7                | 23     | 100   | 65               | 21          | 220  | 198 | 165   |
| December       | 2000 | 11             | 6                 | 14                | 9                 | 12                  | 17                  | 9                | 22     | 100   | 88               | 28          | 283  | 255 | 139   |
| January        | 2001 | 9              | 9                 | 11                | 15                | 10                  | 16                  | 8                | 22     | 100   | 78               | 28          | 246  | 219 | 139   |
| February       | 2001 | 6              | 11                | 7                 | 16                | 11                  | 16                  | 10               | 23     | 100   | 89               | 28          | 255  | 228 | 123   |
| March          | 2001 | 7              | 13                | 6                 | 17                | 13                  | 15                  | 7                | 22     | 100   | 79               | 21          | 212  | 191 | 147   |
| April          | 2001 | 7              | 12                | 7                 | 13                | 14                  | 16                  | 8                | 23     | 100   | 84               | 22          | 220  | 198 | 151   |
| May            | 2001 | 7              | 12                | 10                | 12                | 14                  | 15                  | 8                | 22     | 100   | 79               | 24          | 215  | 191 | 172   |
| June           | 2001 | 9              | 10                | 11                | 11                | 12                  | 15                  | 10               | 22     | 100   | 74               | 23          | 223  | 199 | 170   |
| July           | 2001 | 9              | 10                | 11                | 11                | 10                  | 15                  | 10               | 23     | 100   | 70               | 21          | 239  | 218 | 168   |
| August         | 2001 | 10             | 12                | 11                | 13                | 9                   | 12                  | 9                | 23     | 100   | 59               | 17          | 211  | 193 | 156   |
| September      | 2001 | 9              | 15                | 10                | 16                | 9                   | 8                   | 9                | 24     | 100   | 54               | 17          | 187  | 170 | 153   |
| October        | 2001 | 9              | 14                | 11                | 19                | 10                  | 6                   | 10               | 22     | 100   | 49               | 19          | 146  | 127 | 156   |
| November       | 2001 | 10             | 10                | 8                 | 16                | 11                  | 8                   | 11               | 26     | 100   | 69               | 20          | 193  | 172 | 160   |
| December       | 2001 | 11             | 8                 | 11                | 12                | 11                  | 9                   | 9                | 28     | 100   | 65               | 21          | 193  | 171 | 164   |

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**TABLE 21**  
**CURRENT VALUE OF STOCK MARKET INVESTMENTS**  
**(Three Month Moving Averages)**

| <u>Date of Survey</u> |      | Under | \$10k    | \$25k    | \$50k    | \$100k    | \$200k    | \$500k | DK, NA | Total | Median | Percentiles |      |     | Cases |
|-----------------------|------|-------|----------|----------|----------|-----------|-----------|--------|--------|-------|--------|-------------|------|-----|-------|
|                       |      | \$10k | to \$24k | to \$49k | to \$99k | to \$199k | to \$499k | and up |        |       | 1000's | 25th        | 75th | Rng |       |
| January               | 2002 | 13    | 10       | 11       | 10       | 11        | 8         | 11     | 26     | 100   | 64     | 18          | 276  | 258 | 163   |
| February              | 2002 | 12    | 13       | 15       | 10       | 10        | 9         | 9      | 21     | 100   | 46     | 17          | 247  | 230 | 168   |
| March                 | 2002 | 12    | 16       | 12       | 10       | 12        | 10        | 8      | 19     | 100   | 48     | 15          | 233  | 219 | 168   |
| April                 | 2002 | 10    | 16       | 12       | 9        | 14        | 14        | 3      | 22     | 100   | 52     | 17          | 158  | 141 | 165   |
| May                   | 2002 | 10    | 13       | 12       | 11       | 15        | 13        | 4      | 22     | 100   | 62     | 21          | 145  | 125 | 165   |
| June                  | 2002 | 10    | 9        | 14       | 13       | 14        | 12        | 6      | 22     | 100   | 65     | 23          | 163  | 140 | 174   |
| July                  | 2002 | 16    | 7        | 11       | 15       | 12        | 7         | 8      | 23     | 100   | 56     | 19          | 131  | 112 | 174   |
| August                | 2002 | 16    | 11       | 12       | 14       | 9         | 9         | 7      | 21     | 100   | 44     | 15          | 134  | 119 | 166   |
| September             | 2002 | 15    | 14       | 11       | 14       | 9         | 11        | 4      | 21     | 100   | 47     | 13          | 121  | 108 | 154   |
| October               | 2002 | 11    | 14       | 12       | 14       | 9         | 16        | 4      | 19     | 100   | 55     | 17          | 153  | 135 | 153   |
| November              | 2002 | 11    | 16       | 10       | 10       | 11        | 15        | 5      | 21     | 100   | 53     | 16          | 172  | 155 | 147   |
| December              | 2002 | 12    | 15       | 11       | 8        | 11        | 14        | 5      | 24     | 100   | 52     | 16          | 175  | 158 | 159   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2003 | 11    | 19       | 11       | 14       | 11        | 10        | 3      | 22     | 100   | 45     | 14          | 133  | 118 | 159   |
| February              | 2003 | 14    | 15       | 12       | 16       | 11        | 8         | 2      | 22     | 100   | 46     | 14          | 101  | 87  | 175   |
| March                 | 2003 | 11    | 20       | 12       | 15       | 12        | 10        | 2      | 18     | 100   | 46     | 15          | 111  | 96  | 175   |
| April                 | 2003 | 13    | 18       | 12       | 11       | 13        | 11        | 5      | 18     | 100   | 47     | 14          | 131  | 117 | 182   |
| August                | 2003 | 18    | 15       | 17       | 14       | 8         | 8         | 5      | 15     | 100   | 33     | 11          | 91   | 80  | 191   |
| September             | 2003 | 16    | 17       | 17       | 12       | 8         | 10        | 4      | 16     | 100   | 32     | 13          | 100  | 87  | 183   |
| October               | 2003 | 16    | 15       | 15       | 13       | 9         | 11        | 4      | 18     | 100   | 37     | 12          | 108  | 96  | 190   |
| November              | 2003 | 15    | 14       | 11       | 15       | 10        | 11        | 5      | 18     | 100   | 50     | 14          | 127  | 113 | 184   |
| December              | 2003 | 18    | 10       | 9        | 22       | 9         | 9         | 6      | 17     | 100   | 58     | 11          | 116  | 105 | 192   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2004 | 16    | 14       | 9        | 21       | 8         | 8         | 8      | 16     | 100   | 57     | 13          | 116  | 103 | 195   |
| February              | 2004 | 15    | 15       | 11       | 19       | 8         | 8         | 8      | 15     | 100   | 50     | 13          | 119  | 107 | 197   |
| March                 | 2004 | 11    | 16       | 11       | 18       | 8         | 11        | 9      | 15     | 100   | 54     | 18          | 149  | 131 | 188   |
| April                 | 2004 | 14    | 10       | 11       | 17       | 13        | 12        | 7      | 15     | 100   | 59     | 18          | 164  | 147 | 195   |
| May                   | 2004 | 13    | 8        | 11       | 22       | 12        | 13        | 8      | 15     | 100   | 68     | 23          | 178  | 155 | 187   |
| June                  | 2004 | 13    | 8        | 13       | 17       | 14        | 13        | 7      | 15     | 100   | 63     | 22          | 196  | 174 | 200   |
| July                  | 2004 | 11    | 12       | 12       | 18       | 9         | 15        | 8      | 15     | 100   | 59     | 23          | 210  | 187 | 217   |
| August                | 2004 | 11    | 13       | 13       | 17       | 11        | 13        | 8      | 14     | 100   | 58     | 22          | 196  | 175 | 221   |
| September             | 2004 | 13    | 11       | 11       | 20       | 12        | 14        | 7      | 12     | 100   | 63     | 23          | 174  | 150 | 216   |
| October               | 2004 | 14    | 10       | 10       | 18       | 15        | 13        | 8      | 12     | 100   | 67     | 22          | 168  | 146 | 200   |
| November              | 2004 | 16    | 9        | 11       | 15       | 15        | 13        | 8      | 13     | 100   | 63     | 18          | 169  | 152 | 201   |
| December              | 2004 | 15    | 11       | 11       | 12       | 14        | 13        | 8      | 15     | 100   | 60     | 16          | 177  | 162 | 214   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2005 | 15    | 10       | 11       | 14       | 12        | 14        | 9      | 14     | 100   | 61     | 17          | 199  | 183 | 229   |
| February              | 2005 | 14    | 12       | 12       | 17       | 10        | 15        | 8      | 13     | 100   | 58     | 19          | 183  | 164 | 231   |
| March                 | 2005 | 15    | 11       | 13       | 18       | 9         | 11        | 7      | 15     | 100   | 52     | 18          | 159  | 141 | 214   |
| April                 | 2005 | 15    | 10       | 16       | 15       | 10        | 10        | 6      | 17     | 100   | 47     | 15          | 136  | 120 | 196   |
| May                   | 2005 | 14    | 11       | 16       | 13       | 12        | 11        | 5      | 18     | 100   | 48     | 15          | 144  | 128 | 196   |
| June                  | 2005 | 12    | 11       | 17       | 12       | 12        | 14        | 6      | 17     | 100   | 56     | 19          | 191  | 171 | 203   |
| July                  | 2005 | 11    | 10       | 16       | 12       | 13        | 15        | 7      | 16     | 100   | 66     | 23          | 214  | 191 | 205   |
| August                | 2005 | 13    | 9        | 14       | 12       | 12        | 15        | 8      | 17     | 100   | 68     | 22          | 234  | 213 | 209   |
| September             | 2005 | 14    | 9        | 12       | 11       | 13        | 13        | 10     | 18     | 100   | 66     | 16          | 232  | 216 | 206   |
| October               | 2005 | 15    | 12       | 11       | 11       | 11        | 14        | 8      | 18     | 100   | 64     | 14          | 219  | 205 | 203   |
| November              | 2005 | 13    | 12       | 12       | 15       | 10        | 12        | 7      | 18     | 100   | 62     | 16          | 185  | 169 | 198   |
| December              | 2005 | 12    | 12       | 12       | 14       | 15        | 13        | 8      | 14     | 100   | 74     | 21          | 166  | 145 | 203   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2006 | 11    | 11       | 14       | 15       | 14        | 11        | 8      | 15     | 100   | 66     | 22          | 159  | 137 | 209   |
| February              | 2006 | 14    | 9        | 12       | 10       | 17        | 13        | 11     | 13     | 100   | 76     | 19          | 210  | 191 | 206   |
| March                 | 2006 | 14    | 11       | 12       | 12       | 12        | 15        | 10     | 13     | 100   | 66     | 17          | 220  | 203 | 199   |
| April                 | 2006 | 13    | 13       | 11       | 11       | 15        | 17        | 10     | 11     | 100   | 73     | 18          | 228  | 211 | 199   |

# REGION WEST

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**TABLE 21**  
**CURRENT VALUE OF STOCK MARKET INVESTMENTS**  
**(Three Month Moving Averages)**

| <u>Date of Survey</u> |      | Under | \$10k    | \$25k    | \$50k    | \$100k    | \$200k    | \$500k | DK, NA | Total | Median | Percentiles |      |     | Cases |
|-----------------------|------|-------|----------|----------|----------|-----------|-----------|--------|--------|-------|--------|-------------|------|-----|-------|
|                       |      | \$10k | to \$24k | to \$49k | to \$99k | to \$199k | to \$499k | and up |        |       | 1000's | 25th        | 75th | Rng |       |
| May                   | 2006 | 11    | 13       | 11       | 13       | 13        | 15        | 9      | 14     | 100   | 69     | 21          | 210  | 190 | 201   |
| June                  | 2006 | 10    | 13       | 9        | 13       | 16        | 17        | 7      | 15     | 100   | 80     | 22          | 193  | 171 | 191   |
| July                  | 2006 | 12    | 10       | 9        | 10       | 12        | 16        | 9      | 22     | 100   | 77     | 20          | 213  | 193 | 181   |
| August                | 2006 | 10    | 9        | 9        | 10       | 13        | 18        | 11     | 20     | 100   | 90     | 25          | 245  | 221 | 164   |
| September             | 2006 | 13    | 8        | 10       | 10       | 11        | 14        | 11     | 23     | 100   | 72     | 20          | 233  | 213 | 182   |
| October               | 2006 | 14    | 9        | 9        | 11       | 12        | 15        | 10     | 19     | 100   | 74     | 19          | 226  | 208 | 191   |
| November              | 2006 | 13    | 12       | 10       | 10       | 11        | 14        | 9      | 20     | 100   | 65     | 17          | 214  | 197 | 204   |
| December              | 2006 | 11    | 9        | 11       | 11       | 13        | 16        | 10     | 18     | 100   | 94     | 26          | 234  | 208 | 185   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2007 | 10    | 10       | 12       | 12       | 13        | 16        | 12     | 15     | 100   | 96     | 28          | 259  | 230 | 179   |
| February              | 2007 | 9     | 10       | 9        | 12       | 12        | 16        | 12     | 20     | 100   | 98     | 26          | 270  | 244 | 167   |
| March                 | 2007 | 9     | 12       | 10       | 13       | 12        | 13        | 12     | 19     | 100   | 76     | 21          | 255  | 234 | 185   |
| April                 | 2007 | 10    | 12       | 8        | 12       | 14        | 13        | 12     | 18     | 100   | 83     | 21          | 220  | 200 | 190   |
| May                   | 2007 | 13    | 9        | 9        | 13       | 15        | 14        | 14     | 12     | 100   | 87     | 24          | 239  | 215 | 199   |
| June                  | 2007 | 12    | 9        | 8        | 13       | 15        | 18        | 15     | 10     | 100   | 110    | 32          | 282  | 251 | 180   |
| July                  | 2007 | 10    | 13       | 8        | 13       | 12        | 18        | 15     | 11     | 100   | 98     | 30          | 285  | 254 | 169   |
| August                | 2007 | 8     | 14       | 9        | 11       | 11        | 18        | 13     | 16     | 100   | 99     | 28          | 287  | 259 | 176   |
| September             | 2007 | 10    | 16       | 10       | 11       | 10        | 17        | 13     | 14     | 100   | 78     | 20          | 258  | 238 | 187   |
| October               | 2007 | 14    | 11       | 10       | 10       | 10        | 17        | 14     | 15     | 100   | 77     | 19          | 267  | 249 | 194   |
| November              | 2007 | 20    | 11       | 8        | 10       | 14        | 14        | 11     | 12     | 100   | 68     | 13          | 214  | 201 | 185   |
| December              | 2007 | 18    | 10       | 8        | 7        | 16        | 17        | 11     | 13     | 100   | 80     | 16          | 237  | 222 | 174   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2008 | 14    | 12       | 9        | 10       | 18        | 14        | 8      | 15     | 100   | 78     | 19          | 192  | 173 | 167   |
| February              | 2008 | 12    | 13       | 11       | 12       | 13        | 16        | 10     | 13     | 100   | 70     | 21          | 212  | 191 | 180   |
| March                 | 2008 | 11    | 14       | 11       | 14       | 11        | 14        | 11     | 14     | 100   | 66     | 22          | 232  | 210 | 197   |
| April                 | 2008 | 12    | 12       | 10       | 13       | 10        | 18        | 11     | 14     | 100   | 70     | 20          | 275  | 255 | 210   |
| May                   | 2008 | 11    | 9        | 10       | 12       | 15        | 17        | 10     | 17     | 100   | 90     | 27          | 275  | 248 | 207   |
| June                  | 2008 | 11    | 9        | 8        | 14       | 15        | 18        | 9      | 16     | 100   | 86     | 26          | 249  | 223 | 205   |
| July                  | 2008 | 8     | 10       | 11       | 14       | 17        | 15        | 10     | 17     | 100   | 91     | 30          | 223  | 193 | 188   |
| August                | 2008 | 9     | 12       | 10       | 13       | 15        | 17        | 9      | 14     | 100   | 85     | 25          | 212  | 187 | 190   |
| September             | 2008 | 9     | 11       | 11       | 12       | 17        | 16        | 11     | 13     | 100   | 100    | 27          | 223  | 196 | 197   |
| October               | 2008 | 11    | 9        | 10       | 15       | 16        | 18        | 13     | 9      | 100   | 100    | 30          | 240  | 210 | 215   |
| November              | 2008 | 9     | 8        | 10       | 16       | 18        | 17        | 12     | 10     | 100   | 101    | 34          | 245  | 211 | 223   |
| December              | 2008 | 10    | 9        | 11       | 16       | 16        | 13        | 10     | 15     | 100   | 75     | 29          | 204  | 175 | 222   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2009 | 8     | 13       | 10       | 14       | 15        | 11        | 10     | 19     | 100   | 74     | 24          | 206  | 182 | 214   |
| February              | 2009 | 8     | 14       | 11       | 13       | 12        | 13        | 8      | 20     | 100   | 66     | 20          | 199  | 180 | 204   |
| March                 | 2009 | 9     | 15       | 10       | 15       | 13        | 15        | 8      | 16     | 100   | 73     | 20          | 200  | 180 | 201   |
| April                 | 2009 | 9     | 12       | 13       | 14       | 14        | 16        | 8      | 13     | 100   | 74     | 22          | 222  | 200 | 204   |
| May                   | 2009 | 10    | 11       | 15       | 14       | 14        | 15        | 10     | 12     | 100   | 75     | 24          | 236  | 211 | 205   |
| June                  | 2009 | 9     | 12       | 17       | 13       | 12        | 15        | 10     | 12     | 100   | 68     | 24          | 225  | 200 | 202   |
| July                  | 2009 | 11    | 10       | 16       | 12       | 11        | 15        | 12     | 13     | 100   | 74     | 23          | 253  | 229 | 195   |
| August                | 2009 | 11    | 10       | 13       | 14       | 11        | 13        | 13     | 15     | 100   | 74     | 23          | 259  | 235 | 198   |
| September             | 2009 | 9     | 7        | 12       | 17       | 13        | 13        | 13     | 15     | 100   | 82     | 30          | 279  | 249 | 199   |
| October               | 2009 | 9     | 10       | 8        | 18       | 15        | 12        | 12     | 15     | 100   | 83     | 27          | 246  | 218 | 206   |
| November              | 2009 | 11    | 11       | 9        | 17       | 13        | 14        | 11     | 14     | 100   | 75     | 23          | 223  | 200 | 193   |
| December              | 2009 | 13    | 14       | 8        | 12       | 11        | 14        | 12     | 16     | 100   | 71     | 15          | 247  | 231 | 183   |
|                       |      |       |          |          |          |           |           |        |        |       |        |             |      |     |       |
| January               | 2010 | 12    | 15       | 12       | 13       | 8         | 14        | 12     | 14     | 100   | 57     | 16          | 230  | 215 | 186   |
| February              | 2010 | 8     | 14       | 13       | 15       | 9         | 13        | 13     | 15     | 100   | 63     | 25          | 234  | 209 | 208   |
| March                 | 2010 | 7     | 12       | 11       | 17       | 10        | 16        | 12     | 14     | 100   | 84     | 29          | 235  | 207 | 221   |
| April                 | 2010 | 6     | 11       | 9        | 15       | 15        | 18        | 11     | 16     | 100   | 105    | 32          | 264  | 232 | 223   |
| May                   | 2010 | 7     | 9        | 7        | 15       | 15        | 19        | 10     | 18     | 100   | 110    | 35          | 269  | 234 | 196   |
| June                  | 2010 | 6     | 8        | 11       | 14       | 15        | 19        | 9      | 20     | 100   | 102    | 36          | 261  | 225 | 184   |

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**TABLE 21**  
**CURRENT VALUE OF STOCK MARKET INVESTMENTS**  
**(Three Month Moving Averages)**

| Date of Survey |      | Under<br>\$10k | \$10k<br>to \$24k | \$25k<br>to \$49k | \$50k<br>to \$99k | \$100k<br>to \$199k | \$200k<br>to \$499k | \$500k<br>and up | DK, NA | Total | Median<br>1000's | Percentiles |      |     | Cases |
|----------------|------|----------------|-------------------|-------------------|-------------------|---------------------|---------------------|------------------|--------|-------|------------------|-------------|------|-----|-------|
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  | 25th        | 75th | Rng |       |
| July           | 2010 | 8              | 6                 | 11                | 13                | 14                  | 19                  | 8                | 20     | 100   | 105              | 38          | 248  | 211 | 185   |
| August         | 2010 | 9              | 9                 | 12                | 10                | 13                  | 20                  | 11               | 16     | 100   | 106              | 29          | 302  | 273 | 195   |
| September      | 2010 | 11             | 8                 | 11                | 7                 | 16                  | 19                  | 13               | 14     | 100   | 123              | 28          | 304  | 275 | 205   |
| October        | 2010 | 10             | 9                 | 11                | 7                 | 16                  | 17                  | 15               | 14     | 100   | 123              | 27          | 333  | 305 | 208   |
| November       | 2010 | 8              | 8                 | 9                 | 10                | 20                  | 14                  | 14               | 17     | 100   | 123              | 35          | 258  | 223 | 218   |
| December       | 2010 | 6              | 9                 | 9                 | 11                | 21                  | 13                  | 13               | 18     | 100   | 120              | 38          | 247  | 210 | 200   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2011 | 6              | 7                 | 10                | 13                | 18                  | 17                  | 12               | 18     | 100   | 120              | 39          | 256  | 216 | 193   |
| February       | 2011 | 6              | 10                | 10                | 13                | 14                  | 18                  | 15               | 15     | 100   | 113              | 32          | 318  | 285 | 185   |
| March          | 2011 | 6              | 12                | 8                 | 13                | 13                  | 17                  | 15               | 15     | 100   | 111              | 29          | 332  | 303 | 203   |
| April          | 2011 | 6              | 14                | 7                 | 13                | 13                  | 14                  | 15               | 17     | 100   | 105              | 25          | 332  | 307 | 213   |
| May            | 2011 | 7              | 12                | 8                 | 13                | 15                  | 16                  | 11               | 18     | 100   | 108              | 27          | 284  | 257 | 213   |
| June           | 2011 | 8              | 10                | 10                | 12                | 13                  | 18                  | 9                | 20     | 100   | 97               | 27          | 283  | 256 | 201   |
| July           | 2011 | 9              | 9                 | 8                 | 10                | 13                  | 19                  | 12               | 19     | 100   | 122              | 33          | 325  | 292 | 188   |
| August         | 2011 | 7              | 9                 | 10                | 11                | 11                  | 18                  | 15               | 19     | 100   | 121              | 35          | 376  | 341 | 191   |
| September      | 2011 | 5              | 10                | 9                 | 12                | 13                  | 16                  | 17               | 18     | 100   | 133              | 39          | 405  | 366 | 209   |
| October        | 2011 | 4              | 10                | 12                | 14                | 14                  | 14                  | 15               | 17     | 100   | 111              | 34          | 341  | 307 | 206   |
| November       | 2011 | 3              | 12                | 11                | 16                | 17                  | 13                  | 12               | 16     | 100   | 104              | 34          | 273  | 240 | 208   |
| December       | 2011 | 6              | 10                | 11                | 15                | 17                  | 11                  | 14               | 16     | 100   | 101              | 32          | 305  | 273 | 194   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2012 | 8              | 10                | 10                | 14                | 15                  | 14                  | 12               | 17     | 100   | 96               | 30          | 278  | 248 | 210   |
| February       | 2012 | 9              | 8                 | 9                 | 12                | 12                  | 16                  | 14               | 19     | 100   | 103              | 30          | 344  | 314 | 212   |
| March          | 2012 | 9              | 10                | 10                | 14                | 11                  | 19                  | 11               | 16     | 100   | 87               | 28          | 264  | 236 | 221   |
| April          | 2012 | 8              | 12                | 10                | 15                | 14                  | 16                  | 10               | 13     | 100   | 82               | 27          | 242  | 216 | 201   |
| May            | 2012 | 9              | 12                | 10                | 14                | 17                  | 16                  | 9                | 14     | 100   | 85               | 26          | 223  | 197 | 191   |
| June           | 2012 | 11             | 11                | 9                 | 10                | 19                  | 13                  | 10               | 18     | 100   | 94               | 23          | 241  | 218 | 188   |
| July           | 2012 | 8              | 7                 | 8                 | 13                | 14                  | 16                  | 15               | 19     | 100   | 122              | 39          | 337  | 298 | 203   |
| August         | 2012 | 7              | 8                 | 8                 | 12                | 13                  | 17                  | 15               | 20     | 100   | 131              | 42          | 322  | 280 | 202   |
| September      | 2012 | 3              | 8                 | 7                 | 15                | 12                  | 20                  | 17               | 18     | 100   | 156              | 53          | 378  | 324 | 210   |
| October        | 2012 | 7              | 7                 | 8                 | 16                | 14                  | 15                  | 17               | 16     | 100   | 129              | 43          | 318  | 275 | 202   |
| November       | 2012 | 7              | 6                 | 7                 | 17                | 15                  | 17                  | 17               | 13     | 100   | 135              | 44          | 333  | 288 | 193   |
| December       | 2012 | 8              | 8                 | 7                 | 17                | 16                  | 16                  | 12               | 16     | 100   | 109              | 37          | 259  | 221 | 202   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2013 | 7              | 11                | 7                 | 14                | 15                  | 18                  | 12               | 16     | 100   | 106              | 34          | 274  | 240 | 209   |
| February       | 2013 | 8              | 12                | 9                 | 14                | 11                  | 16                  | 13               | 17     | 100   | 85               | 27          | 289  | 262 | 213   |
| March          | 2013 | 8              | 9                 | 11                | 12                | 9                   | 16                  | 18               | 16     | 100   | 119              | 29          | 382  | 353 | 191   |
| April          | 2013 | 9              | 8                 | 10                | 15                | 9                   | 15                  | 16               | 19     | 100   | 120              | 29          | 341  | 312 | 174   |
| May            | 2013 | 11             | 8                 | 7                 | 14                | 10                  | 15                  | 16               | 19     | 100   | 125              | 28          | 359  | 330 | 178   |
| June           | 2013 | 12             | 11                | 6                 | 14                | 13                  | 13                  | 14               | 17     | 100   | 85               | 21          | 270  | 250 | 179   |
| July           | 2013 | 11             | 11                | 7                 | 13                | 16                  | 13                  | 16               | 13     | 100   | 89               | 26          | 287  | 260 | 177   |
| August         | 2013 | 11             | 11                | 8                 | 15                | 17                  | 13                  | 14               | 11     | 100   | 78               | 25          | 240  | 215 | 169   |
| September      | 2013 | 8              | 10                | 9                 | 16                | 15                  | 15                  | 16               | 11     | 100   | 102              | 32          | 306  | 274 | 175   |
| October        | 2013 | 9              | 9                 | 9                 | 14                | 13                  | 17                  | 16               | 14     | 100   | 105              | 29          | 364  | 335 | 190   |
| November       | 2013 | 7              | 8                 | 9                 | 15                | 11                  | 15                  | 18               | 16     | 100   | 112              | 33          | 378  | 345 | 206   |
| December       | 2013 | 10             | 7                 | 9                 | 17                | 11                  | 14                  | 16               | 17     | 100   | 89               | 31          | 320  | 290 | 208   |
|                |      |                |                   |                   |                   |                     |                     |                  |        |       |                  |             |      |     |       |
| January        | 2014 | 9              | 6                 | 8                 | 14                | 11                  | 17                  | 17               | 18     | 100   | 126              | 42          | 347  | 304 | 205   |
| February       | 2014 | 7              | 6                 | 5                 | 14                | 13                  | 21                  | 17               | 17     | 100   | 155              | 52          | 364  | 312 | 189   |
| March          | 2014 | 6              | 8                 | 5                 | 12                | 14                  | 20                  | 19               | 15     | 100   | 162              | 51          | 362  | 311 | 195   |
| April          | 2014 | 6              | 10                | 9                 | 13                | 12                  | 21                  | 16               | 13     | 100   | 137              | 42          | 299  | 256 | 195   |
| May            | 2014 | 6              | 13                | 12                | 13                | 11                  | 18                  | 15               | 13     | 100   | 105              | 31          | 290  | 259 | 216   |
| June           | 2014 | 7              | 13                | 13                | 12                | 11                  | 17                  | 14               | 13     | 100   | 101              | 30          | 274  | 243 | 221   |
| July           | 2014 | 7              | 14                | 10                | 13                | 10                  | 17                  | 16               | 13     | 100   | 116              | 24          | 315  | 290 | 231   |
| August         | 2014 | 12             | 12                | 9                 | 9                 | 11                  | 18                  | 19               | 11     | 100   | 137              | 22          | 367  | 344 | 228   |

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**TABLE 21**  
**CURRENT VALUE OF STOCK MARKET INVESTMENTS**  
**(Three Month Moving Averages)**

| Date of Survey |      | Under | \$10k    | \$25k    | \$50k    | \$100k    | \$200k    | \$500k | DK, NA | Total | Median | Percentiles |      |     | Cases |
|----------------|------|-------|----------|----------|----------|-----------|-----------|--------|--------|-------|--------|-------------|------|-----|-------|
|                |      | \$10k | to \$24k | to \$49k | to \$99k | to \$199k | to \$499k | and up |        |       | 1000's | 25th        | 75th | Rng |       |
| September      | 2014 | 14    | 10       | 5        | 10       | 11        | 21        | 19     | 10     | 100   | 141    | 22          | 400  | 378 | 212   |
| October        | 2014 | 13    | 10       | 6        | 13       | 14        | 19        | 17     | 9      | 100   | 109    | 25          | 350  | 324 | 198   |
| November       | 2014 | 12    | 8        | 6        | 17       | 13        | 18        | 13     | 13     | 100   | 92     | 30          | 290  | 260 | 199   |
| December       | 2014 | 14    | 8        | 8        | 16       | 13        | 15        | 12     | 14     | 100   | 85     | 26          | 260  | 235 | 198   |
| January        | 2015 | 11    | 9        | 8        | 13       | 13        | 17        | 14     | 14     | 100   | 108    | 29          | 304  | 275 | 218   |
| February       | 2015 | 8     | 10       | 10       | 10       | 15        | 16        | 17     | 13     | 100   | 132    | 32          | 362  | 331 | 213   |
| March          | 2015 | 6     | 10       | 10       | 13       | 13        | 17        | 20     | 13     | 100   | 130    | 36          | 414  | 379 | 199   |
| April          | 2015 | 10    | 7        | 8        | 13       | 14        | 16        | 18     | 14     | 100   | 118    | 30          | 381  | 351 | 196   |
| May            | 2015 | 12    | 8        | 8        | 17       | 14        | 14        | 14     | 14     | 100   | 86     | 28          | 293  | 265 | 190   |
| June           | 2015 | 12    | 7        | 9        | 17       | 15        | 17        | 13     | 11     | 100   | 102    | 32          | 269  | 237 | 198   |
| July           | 2015 | 10    | 7        | 13       | 15       | 14        | 14        | 14     | 12     | 100   | 93     | 33          | 249  | 216 | 197   |
| August         | 2015 | 9     | 5        | 11       | 11       | 15        | 17        | 18     | 14     | 100   | 145    | 48          | 362  | 315 | 212   |
| September      | 2015 | 8     | 8        | 8        | 12       | 15        | 16        | 18     | 16     | 100   | 136    | 46          | 365  | 319 | 233   |
| October        | 2015 | 9     | 8        | 6        | 12       | 12        | 21        | 16     | 16     | 100   | 143    | 43          | 389  | 346 | 250   |
| November       | 2015 | 9     | 10       | 8        | 11       | 13        | 19        | 17     | 12     | 100   | 123    | 30          | 359  | 329 | 244   |
| December       | 2015 | 9     | 9        | 11       | 8        | 14        | 22        | 17     | 9      | 100   | 146    | 30          | 371  | 341 | 235   |
| January        | 2016 | 7     | 8        | 12       | 9        | 17        | 21        | 17     | 9      | 100   | 143    | 37          | 363  | 326 | 203   |
| February       | 2016 | 9     | 7        | 12       | 12       | 15        | 20        | 14     | 11     | 100   | 118    | 34          | 306  | 272 | 220   |
| March          | 2016 | 10    | 8        | 11       | 13       | 12        | 18        | 15     | 13     | 100   | 90     | 30          | 294  | 264 | 241   |
| April          | 2016 | 12    | 12       | 9        | 11       | 12        | 18        | 14     | 13     | 100   | 92     | 21          | 283  | 262 | 281   |
| May            | 2016 | 12    | 12       | 9        | 9        | 13        | 20        | 13     | 12     | 100   | 100    | 20          | 271  | 251 | 282   |
| June           | 2016 | 12    | 11       | 8        | 9        | 17        | 18        | 14     | 10     | 100   | 104    | 24          | 263  | 239 | 266   |
| July           | 2016 | 12    | 8        | 11       | 11       | 17        | 16        | 16     | 9      | 100   | 100    | 31          | 275  | 243 | 242   |
| August         | 2016 | 12    | 8        | 10       | 17       | 16        | 13        | 16     | 8      | 100   | 87     | 33          | 257  | 224 | 237   |
| September      | 2016 | 13    | 7        | 10       | 16       | 14        | 14        | 16     | 9      | 100   | 86     | 29          | 266  | 237 | 247   |
| October        | 2016 | 12    | 11       | 8        | 16       | 13        | 15        | 16     | 10     | 100   | 90     | 25          | 260  | 235 | 270   |
| November       | 2016 | 11    | 13       | 8        | 13       | 15        | 17        | 14     | 9      | 100   | 95     | 22          | 267  | 245 | 277   |
| December       | 2016 | 8     | 15       | 11       | 14       | 14        | 15        | 13     | 11     | 100   | 87     | 23          | 235  | 212 | 280   |
| January        | 2017 | 8     | 13       | 11       | 16       | 14        | 15        | 12     | 11     | 100   | 80     | 28          | 216  | 189 | 272   |
| February       | 2017 | 9     | 11       | 11       | 15       | 14        | 13        | 16     | 10     | 100   | 87     | 32          | 278  | 247 | 280   |
| March          | 2017 | 10    | 9        | 11       | 16       | 12        | 13        | 18     | 11     | 100   | 84     | 34          | 276  | 243 | 274   |
| April          | 2017 | 11    | 10       | 11       | 12       | 12        | 13        | 18     | 12     | 100   | 93     | 27          | 308  | 281 | 278   |
| May            | 2017 | 11    | 11       | 10       | 14       | 13        | 13        | 15     | 14     | 100   | 89     | 25          | 241  | 217 | 280   |
| June           | 2017 | 10    | 11       | 7        | 13       | 14        | 16        | 16     | 13     | 100   | 105    | 23          | 305  | 282 | 296   |
| July           | 2017 | 9     | 10       | 8        | 16       | 14        | 14        | 14     | 15     | 100   | 94     | 28          | 277  | 249 | 307   |
| August         | 2017 | 9     | 8        | 9        | 13       | 13        | 16        | 17     | 14     | 100   | 107    | 31          | 342  | 311 | 302   |
| September      | 2017 | 8     | 10       | 10       | 13       | 13        | 16        | 16     | 14     | 100   | 102    | 31          | 338  | 308 | 294   |
| October        | 2017 | 9     | 11       | 9        | 11       | 11        | 18        | 19     | 11     | 100   | 106    | 28          | 380  | 352 | 284   |
| November       | 2017 | 11    | 11       | 10       | 10       | 10        | 17        | 19     | 13     | 100   | 109    | 24          | 380  | 357 | 288   |
| December       | 2017 | 12    | 10       | 8        | 11       | 11        | 16        | 22     | 11     | 100   | 112    | 28          | 414  | 387 | 296   |
| January        | 2018 | 12    | 9        | 8        | 10       | 11        | 16        | 21     | 12     | 100   | 118    | 28          | 421  | 393 | 291   |
| February       | 2018 | 12    | 10       | 6        | 11       | 11        | 17        | 22     | 11     | 100   | 120    | 28          | 444  | 416 | 301   |
| March          | 2018 | 10    | 9        | 7        | 10       | 12        | 17        | 21     | 14     | 100   | 129    | 32          | 428  | 396 | 305   |
| April          | 2018 | 9     | 11       | 6        | 11       | 13        | 17        | 21     | 13     | 100   | 130    | 32          | 434  | 402 | 304   |
| May            | 2018 | 8     | 13       | 6        | 11       | 12        | 17        | 19     | 13     | 100   | 117    | 30          | 412  | 382 | 289   |
| June           | 2018 | 10    | 13       | 7        | 11       | 11        | 18        | 19     | 12     | 100   | 123    | 25          | 394  | 370 | 279   |
| July           | 2018 | 12    | 11       | 9        | 12       | 9         | 16        | 18     | 12     | 100   | 106    | 24          | 396  | 372 | 270   |
| August         | 2018 | 13    | 7        | 8        | 12       | 11        | 14        | 22     | 12     | 100   | 122    | 32          | 455  | 423 | 267   |
| September      | 2018 | 12    | 7        | 9        | 13       | 11        | 15        | 22     | 12     | 100   | 111    | 36          | 422  | 386 | 287   |
| October        | 2018 | 11    | 6        | 8        | 12       | 12        | 17        | 22     | 12     | 100   | 135    | 40          | 427  | 387 | 291   |

# REGION WEST

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**TABLE 21**  
**CURRENT VALUE OF STOCK MARKET INVESTMENTS**  
**(Three Month Moving Averages)**

| <u>Date of Survey</u> |      | Under | \$10k    | \$25k    | \$50k    | \$100k    | \$200k    | \$500k | DK, NA | Total | Median | Percentiles |      |     | Cases |
|-----------------------|------|-------|----------|----------|----------|-----------|-----------|--------|--------|-------|--------|-------------|------|-----|-------|
|                       |      | \$10k | to \$24k | to \$49k | to \$99k | to \$199k | to \$499k | and up |        |       | 1000's | 25th        | 75th | Rng |       |
| November              | 2018 | 9     | 9        | 9        | 14       | 12        | 18        | 18     | 11     | 100   | 115    | 33          | 327  | 294 | 306   |
| December              | 2018 | 12    | 10       | 9        | 14       | 12        | 15        | 18     | 10     | 100   | 97     | 23          | 330  | 307 | 296   |
| January               | 2019 | 11    | 11       | 9        | 14       | 11        | 13        | 19     | 13     | 100   | 98     | 23          | 350  | 328 | 302   |
| February              | 2019 | 11    | 8        | 8        | 14       | 10        | 14        | 20     | 15     | 100   | 112    | 32          | 418  | 387 | 288   |
| March                 | 2019 | 7     | 8        | 8        | 13       | 12        | 18        | 20     | 15     | 100   | 135    | 40          | 453  | 413 | 296   |
| April                 | 2019 | 8     | 7        | 6        | 16       | 14        | 17        | 19     | 14     | 100   | 122    | 46          | 386  | 341 | 298   |
| May                   | 2019 | 7     | 11       | 9        | 13       | 14        | 17        | 20     | 10     | 100   | 110    | 38          | 371  | 334 | 316   |
| June                  | 2019 | 8     | 12       | 8        | 13       | 13        | 13        | 21     | 11     | 100   | 102    | 33          | 398  | 365 | 316   |
| July                  | 2019 | 9     | 11       | 10       | 12       | 13        | 13        | 21     | 11     | 100   | 101    | 31          | 388  | 357 | 313   |
| August                | 2019 | 10    | 8        | 10       | 12       | 12        | 16        | 20     | 13     | 100   | 132    | 33          | 379  | 345 | 300   |
| September             | 2019 | 13    | 6        | 9        | 10       | 12        | 18        | 19     | 12     | 100   | 141    | 32          | 362  | 330 | 285   |
| October               | 2019 | 13    | 8        | 7        | 9        | 13        | 19        | 18     | 12     | 100   | 141    | 25          | 380  | 354 | 298   |
| November              | 2019 | 12    | 7        | 6        | 11       | 14        | 15        | 19     | 16     | 100   | 120    | 29          | 411  | 382 | 332   |
| December              | 2019 | 13    | 7        | 7        | 13       | 13        | 13        | 18     | 16     | 100   | 104    | 27          | 382  | 355 | 357   |
| January               | 2020 | 13    | 7        | 9        | 11       | 10        | 16        | 21     | 15     | 100   | 117    | 29          | 448  | 418 | 345   |
| February              | 2020 | 13    | 8        | 9        | 10       | 11        | 17        | 21     | 12     | 100   | 126    | 28          | 444  | 415 | 316   |
| March                 | 2020 | 11    | 10       | 8        | 8        | 11        | 20        | 20     | 12     | 100   | 141    | 28          | 461  | 433 | 308   |
| April                 | 2020 | 9     | 11       | 9        | 10       | 11        | 17        | 19     | 13     | 100   | 128    | 29          | 418  | 389 | 312   |
| May                   | 2020 | 9     | 12       | 10       | 11       | 9         | 17        | 18     | 14     | 100   | 107    | 25          | 390  | 365 | 327   |
| June                  | 2020 | 10    | 11       | 9        | 12       | 9         | 15        | 20     | 13     | 100   | 106    | 28          | 413  | 385 | 312   |
| July                  | 2020 | 15    | 8        | 7        | 12       | 9         | 18        | 18     | 13     | 100   | 106    | 23          | 393  | 369 | 300   |
| August                | 2020 | 15    | 7        | 6        | 12       | 11        | 17        | 20     | 13     | 100   | 124    | 27          | 424  | 397 | 290   |
| September             | 2020 | 15    | 6        | 6        | 12       | 12        | 16        | 20     | 12     | 100   | 120    | 29          | 408  | 380 | 293   |
| October               | 2020 | 11    | 7        | 9        | 10       | 12        | 14        | 22     | 14     | 100   | 134    | 32          | 452  | 420 | 327   |
| November              | 2020 | 8     | 9        | 7        | 10       | 14        | 16        | 21     | 14     | 100   | 144    | 39          | 448  | 408 | 334   |
| December              | 2020 | 9     | 10       | 7        | 8        | 14        | 15        | 22     | 15     | 100   | 142    | 36          | 499  | 462 | 330   |
| January               | 2021 | 9     | 11       | 4        | 7        | 15        | 15        | 23     | 15     | 100   | 149    | 36          | 521  | 485 | 306   |
| February              | 2021 | 11    | 11       | 6        | 6        | 17        | 14        | 22     | 14     | 100   | 129    | 27          | 495  | 468 | 304   |
| March                 | 2021 | 10    | 11       | 5        | 7        | 17        | 14        | 22     | 14     | 100   | 127    | 28          | 468  | 440 | 300   |
| April                 | 2021 | 10    | 10       | 5        | 10       | 15        | 16        | 20     | 14     | 100   | 109    | 29          | 429  | 400 | 313   |
| May                   | 2021 | 11    | 8        | 7        | 11       | 10        | 16        | 23     | 14     | 100   | 133    | 29          | 489  | 460 | 314   |
| June                  | 2021 | 11    | 8        | 9        | 9        | 9         | 16        | 26     | 13     | 100   | 149    | 29          | 537  | 508 | 321   |
| July                  | 2021 | 13    | 7        | 8        | 7        | 9         | 16        | 28     | 13     | 100   | 191    | 28          | 579  | 551 | 294   |
| August                | 2021 | 12    | 8        | 7        | 8        | 9         | 15        | 25     | 15     | 100   | 176    | 26          | 556  | 530 | 282   |
| September             | 2021 | 13    | 8        | 6        | 10       | 9         | 15        | 22     | 17     | 100   | 156    | 25          | 492  | 467 | 285   |
| October               | 2021 | 12    | 11       | 7        | 11       | 9         | 16        | 20     | 15     | 100   | 125    | 23          | 439  | 416 | 302   |
| November              | 2021 | 10    | 13       | 6        | 13       | 9         | 16        | 21     | 12     | 100   | 115    | 27          | 462  | 435 | 313   |
| December              | 2021 | 9     | 13       | 5        | 11       | 12        | 18        | 21     | 11     | 100   | 132    | 30          | 455  | 425 | 308   |
| January               | 2022 | 11    | 11       | 3        | 10       | 13        | 16        | 24     | 13     | 100   | 130    | 30          | 512  | 482 | 302   |
| February              | 2022 | 12    | 9        | 3        | 10       | 14        | 16        | 23     | 12     | 100   | 141    | 31          | 486  | 455 | 285   |
| March                 | 2022 | 10    | 8        | 5        | 10       | 14        | 16        | 24     | 13     | 100   | 145    | 36          | 507  | 471 | 301   |
| April                 | 2022 | 8     | 10       | 5        | 11       | 14        | 17        | 23     | 11     | 100   | 154    | 36          | 494  | 458 | 315   |
| May                   | 2022 | 10    | 10       | 8        | 9        | 11        | 16        | 24     | 12     | 100   | 136    | 29          | 519  | 489 | 313   |
| June                  | 2022 | 12    | 8        | 7        | 8        | 12        | 17        | 24     | 11     | 100   | 143    | 32          | 521  | 488 | 294   |
| July                  | 2022 | 13    | 7        | 10       | 9        | 11        | 15        | 24     | 12     | 100   | 117    | 32          | 487  | 455 | 279   |
| August                | 2022 | 10    | 7        | 8        | 10       | 12        | 17        | 22     | 14     | 100   | 149    | 38          | 457  | 418 | 276   |
| September             | 2022 | 9     | 9        | 8        | 13       | 10        | 15        | 20     | 16     | 100   | 124    | 32          | 409  | 378 | 273   |
| October               | 2022 | 8     | 9        | 7        | 11       | 13        | 16        | 19     | 16     | 100   | 132    | 31          | 407  | 376 | 285   |
| November              | 2022 | 10    | 13       | 5        | 11       | 13        | 17        | 18     | 13     | 100   | 107    | 22          | 349  | 327 | 289   |
| December              | 2022 | 11    | 11       | 4        | 9        | 16        | 18        | 20     | 12     | 100   | 131    | 31          | 419  | 387 | 290   |

# REGION WEST

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**TABLE 21**  
**CURRENT VALUE OF STOCK MARKET INVESTMENTS**  
**(Three Month Moving Averages)**

| <u>Date of Survey</u> |      | <u>Under</u> | <u>\$10k</u>    | <u>\$25k</u>    | <u>\$50k</u>    | <u>\$100k</u>    | <u>\$200k</u>    | <u>\$500k</u> |               |              | <u>Median</u> | <u>Percentiles</u> |             |            |              |
|-----------------------|------|--------------|-----------------|-----------------|-----------------|------------------|------------------|---------------|---------------|--------------|---------------|--------------------|-------------|------------|--------------|
|                       |      | <u>\$10k</u> | <u>to \$24k</u> | <u>to \$49k</u> | <u>to \$99k</u> | <u>to \$199k</u> | <u>to \$499k</u> | <u>and up</u> | <u>DK, NA</u> | <u>Total</u> | <u>1000's</u> | <u>25th</u>        | <u>75th</u> | <u>Rng</u> | <u>Cases</u> |
| January               | 2023 | 10           | 10              | 5               | 8               | 14               | 18               | 23            | 11            | 100          | 147           | 34                 | 478         | 444        | 276          |
| February              | 2023 | 12           | 7               | 5               | 9               | 14               | 17               | 25            | 12            | 100          | 149           | 36                 | 516         | 479        | 272          |
| March                 | 2023 | 11           | 10              | 7               | 11              | 10               | 16               | 22            | 12            | 100          | 124           | 27                 | 467         | 440        | 274          |
| April                 | 2023 | 12           | 9               | 7               | 11              | 10               | 18               | 21            | 13            | 100          | 128           | 26                 | 434         | 408        | 298          |
| May                   | 2023 | 9            | 9               | 8               | 11              | 11               | 18               | 20            | 14            | 100          | 123           | 34                 | 427         | 393        | 309          |
| June                  | 2023 | 9            | 7               | 8               | 8               | 14               | 18               | 21            | 15            | 100          | 147           | 39                 | 467         | 428        | 308          |
| July                  | 2023 | 7            | 6               | 9               | 11              | 13               | 16               | 22            | 15            | 100          | 128           | 43                 | 503         | 460        | 270          |
| August                | 2023 | 7            | 6               | 9               | 11              | 13               | 18               | 22            | 14            | 100          | 144           | 45                 | 507         | 461        | 258          |
| September             | 2023 | 7            | 7               | 9               | 12              | 12               | 18               | 22            | 13            | 100          | 144           | 42                 | 494         | 452        | 276          |
| October               | 2023 | 9            | 7               | 7               | 8               | 14               | 17               | 23            | 14            | 100          | 162           | 41                 | 487         | 447        | 278          |
| November              | 2023 | 8            | 8               | 7               | 7               | 14               | 14               | 25            | 17            | 100          | 170           | 39                 | 544         | 506        | 293          |
| December              | 2023 | 10           | 8               | 6               | 8               | 14               | 14               | 26            | 16            | 100          | 164           | 37                 | 538         | 501        | 287          |
| January               | 2024 | 9            | 8               | 6               | 10              | 14               | 13               | 25            | 14            | 100          | 159           | 40                 | 527         | 487        | 304          |
| February              | 2024 | 10           | 6               | 7               | 15              | 12               | 17               | 22            | 12            | 100          | 151           | 41                 | 469         | 429        | 289          |
| March                 | 2024 | 7            | 6               | 7               | 16              | 12               | 17               | 24            | 11            | 100          | 166           | 49                 | 501         | 452        | 291          |