TABLE 21

CURRENT VALUE OF STOCK MARKET INVESTMENTS

THREE MONTH MOVING AVERAGES

	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
UNDER $10,000	10%	10%	11%	9%	10%	10%	9%	8%	8%	9%	10%	9%	10%
$10,000-24,999	6	7	7	8	8	7	7	7	8	9	8	8	7
$25,000-49,999	7	8	9	9	8	6	7	8	8	8	7	7	7
$50,000-99,999	9	11	11	11	9	11	11	12	11	11	11	12	12
$100,000-199,999	13	12	11	11	11	10	10	10	11	11	11	11	10
$200,000-499,999	16	16	16	17	18	17	16	16	17	16	16	16	17
$500,000 AND UP	23	21	20	20	21	23	23	22	21	22	23	24	24
DK/NA	16	15	15	15	15	16	17	17	16	14	14	13	13
TOTAL	100	100	100	100	100	100	100	100	100	100	100	100	100
CASES	1219	1217	1234	1253	1249	1225	1208	1246	1259	1252	1251	1252	1250
MEDIAN (1,000's)	155	138	127	127	143	154	155	154	148	147	148	156	156
25th PERCENTILE (1,000's)	34	34	32	35	34	39	38	41	37	35	34	40	40
75th PERCENTILE (1,000's)	495	459	418	428	460	520	524	508	480	490	503	532	527
INTERQUARTILE RANGE (75th-25th) (1,000's)	461	425	386	393	426	481	485	467	443	454	468	492	487

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

	Feb 2023	Mar 2023	Apr 2023	May 2023	Jun 2023	Jul 2023	Aug 2023	Sep 2023	Oct 2023	Nov 2023	Dec 2023	Jan 2024	Feb 2024
All	155	138	127	127	143	154	155	154	148	147	148	156	156
Age 18 to 44	39	44	44	53	51	61	54	57	54	50	46	56	57
Age 45 to 64	245	244	229	214	228	231	236	230	235	247	255	261	293
Age 65+	279	255	255	296	296	342	301	280	232	267	320	335	313
Income Bottom Third	23	33	36	42	30	27	36	35	43	34	37	36	41
Income Middle Third	94	79	60	73	83	94	80	73	67	77	90	99	87
Income Top Third	370	311	293	291	321	366	384	387	338	336	310	339	359
Educ High School or Less	65	67	44	56	46	62	56	61	68	76	84	79	79
Educ Some College	58	58	54	58	54	63	70	71	69	67	72	75	69
Educ College Degree	233	197	191	189	219	238	246	246	227	224	218	241	244
Democrat	180	184	173	173	175	187	198	222	191	201	178	213	208
Independent	108	99	95	96	114	117	127	108	114	95	115	108	102
Republican	171	150	125	151	172	203	184	164	139	145	159	167	180

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