

P144312A Internal Individual Investor Study

June 2020

P144312A Internal Individual Investor Study

Report Settings

| | |
|--------------------|-----------------------|
| Respondents: | Qualified Only |
| Additional Filter: | None |
| Table Set: | All |
| Percentage Base: | Total Answering |
| Stat Test Levels: | 95 / 90 (z-test) |
| Stat Test Groups: | ,BC,D-G,HI |
| Date Range: | (06/17/20 - 06/25/20) |

Segment Definitions

| | | |
|--------------------|--|-------|
| Total | (ALL) | n=200 |
| Male | (finGen.r1) | n=103 |
| Female | (finGen.r2) | n=97 |
| 18-34 | (netAge.r1 or netAge.r2) | n=52 |
| 35-44 | (netAge.r3) | n=32 |
| 45-54 | (netAge.r4) | n=43 |
| 55+ | (netAge.r5 or netAge.r6) | n=73 |
| Less than \$100,00 | (netHhIncUS.r4 or netHhIncUS.r5 or netHhIncUS.r6 or netHhIncUS.r1 or netHhIncUS.r2 or netHhIncUS.r3) | n=102 |
| \$100,000 or more | (netHhIncUS.r7) | n=97 |

Weighting

| | | |
|-------|-------------|------------------|
| Total | nweight.val | WT_p144312a_norm |
|-------|-------------|------------------|

dmCntry: Country

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| United States of America | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Australia | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Brazil | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Canada | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| China | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| France | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Germany | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| India | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Italy | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Japan | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Mexico | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Russian Federation | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Spain | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| United Kingdom | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Other country | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

Table Base: Total Answering

dmAge: Age

| | | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|-------------------------------|------------|----------------|-------------|------------|------------|-------------|--------------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Mean | 47.86 | 47.48 | 48.26 | 25.17 | 40.00 D | 48.96 DE | 66.84 DEF | 48.64 | 46.89 |
| Median | 48.00 | 45.00 | 49.00 | 25.00 | 40.00 | 48.00 | 67.00 | 48.00 | 45.00 |
| Standard Deviation | 17.41 | 15.92 | 18.96 | 5.18 | 2.42 | 3.03 | 6.81 | 20.22 | 13.98 |

finGen: Gender (Final)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Male | 52% | 100% C | 0% | 45% | 68% | 47% | 52% | 40% | 64% H |
| Female | 48% | 0% | 100% B | 55% | 32% | 53% | 48% | 60% I | 36% |

Table Base: Total Answering

netAge: Age (Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|-------------|-------------|-------------|------------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| 18-34 | 26% | 23% | 29% | 100% EFG | 0% | 0% | 0% | 34% i | 18% |
| 18-24 | 12% | 11% | 14% | 47% EFG | 0% | 0% | 0% | 16% | 8% |
| 25-34 | 14% | 12% | 15% | 53% EFG | 0% | 0% | 0% | 17% | 10% |
| 35-44 | 16% | 21% | 11% | 0% | 100% DFG | 0% | 0% | 8% | 26% H |
| 45-54 | 21% | 20% | 23% | 0% | 0% | 100% DEG | 0% | 15% | 27% |
| 55-64 | 16% | 20% | 12% | 0% | 0% | 0% | 44% DEF | 15% | 17% |
| 65+ | 21% | 16% | 25% | 0% | 0% | 0% | 56% DEF | 29% I | 12% |

Table Base: Total Answering

netGenAge: Gender Age (Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Male 18-24 | 6% | 11% C | 0% | 21% EFG | 0% | 0% | 0% | 7% | 4% |
| Male 25-34 | 6% | 12% C | 0% | 24% EFG | 0% | 0% | 0% | 5% | 7% |
| Male 35-44 | 11% | 21% C | 0% | 0% | 68% DFG | 0% | 0% | 3% | 20% H |
| Male 45-54 | 10% | 20% C | 0% | 0% | 0% | 47% DEG | 0% | 5% | 15% h |
| Male 55-64 | 10% | 20% C | 0% | 0% | 0% | 0% | 28% DEF | 8% | 13% |
| Male 65+ | 9% | 16% C | 0% | 0% | 0% | 0% | 23% DEF | 12% | 5% |
| Female 18-24 | 7% | 0% | 14% B | 26% EFG | 0% | 0% | 0% | 9% | 4% |
| Female 25-34 | 7% | 0% | 15% B | 28% EFG | 0% | 0% | 0% | 12% i | 3% |
| Female 35-44 | 5% | 0% | 11% B | 0% | 32% DFG | 0% | 0% | 5% | 6% |
| Female 45-54 | 11% | 0% | 23% B | 0% | 0% | 53% DEG | 0% | 10% | 12% |
| Female 55-64 | 6% | 0% | 12% B | 0% | 0% | 0% | 15% Def | 7% | 4% |

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netGenAge: Gender Age (Net)

| | | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|-------------------|------------|----------------|-----------------|------------|------------|------------|-------------------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Female 65+ | 12% | 0% | 25% B | 0% | 0% | 0% | 33% DEF | 17% | 7% |

Table Base: Total Answering

dmStateUS: State (US)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|-----------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Alabama | 0% | 1% | 0% | 1% | 0% | 1% | 0% | 0% | 1% |
| Alaska | 0% | 1% | 0% | 1% | 0% | 0% | 0% | 1% | 0% |
| Arizona | 4% | 5% | 3% | 6% | 2% | 2% | 4% | 7% | 1% |
| Arkansas | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% |
| California | 10% | 12% | 7% | 11% | 9% | 12% | 7% | 6% | 14% |
| Colorado | 1% | 0% | 3% | 0% | 0% | 4% | 1% | 1% | 2% |
| Connecticut | 0% | 1% | 0% | 0% | 0% | 1% | 0% | 1% | 0% |
| Delaware | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| District of Columbia | 1% | 1% | 0% | 0% | 4% | 0% | 0% | 0% | 1% |
| Florida | 5% | 4% | 6% | 2% | 14% | 1% | 5% | 6% | 4% |
| Georgia | 4% | 2% | 6% | 3% | 0% | 4% | 6% | 3% | 4% |
| Hawaii | 2% | 4% | 0% | 0% | 0% | 0% | 5% | 4% | 0% |
| Idaho | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 0% |
| Illinois | 2% | 1% | 4% | 4% | 0% | 1% | 3% | 4% | 0% |
| Indiana | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Iowa | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Kansas | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Kentucky | 1% | 1% | 2% | 0% | 0% | 4% | 1% | 3% | 0% |
| Louisiana | 0% | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% |

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dmStateUS: State (US)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|-----------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Maine | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Maryland | 2% | 0% | 4% | 6% | 0% | 0% | 2% | 0% | 4% |
| Massachusetts | 1% | 1% | 1% | 0% | 0% | 0% | 3% | 2% | 0% |
| Michigan | 5% | 7% | 3% | 5% | 7% | 3% | 6% | 6% | 4% |
| Minnesota | 3% | 0% | 7% b | 0% | 10% | 0% | 5% | 6% i | 0% |
| Mississippi | 1% | 0% | 1% | 2% | 0% | 0% | 0% | 1% | 0% |
| Missouri | 3% | 1% | 5% | 0% | 2% | 0% | 8% | 6% | 1% |
| Montana | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Nebraska | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 0% | 0% |
| Nevada | 0% | 0% | 0% | 0% | 1% | 0% | 0% | 1% | 0% |
| New Hampshire | 1% | 2% | 0% | 0% | 0% | 4% | 0% | 0% | 2% |
| New Jersey | 2% | 4% | 1% | 0% | 1% | 11% dg | 0% | 4% | 1% |
| New Mexico | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| New York | 11% | 12% | 9% | 16% | 28% FG | 4% | 3% | 3% | 18% H |
| North Carolina | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| North Dakota | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Ohio | 5% | 6% | 5% | 4% | 6% | 0% | 9% | 9% | 2% |
| Oklahoma | 0% | 1% | 0% | 0% | 1% | 0% | 1% | 1% | 0% |
| Oregon | 3% | 3% | 3% | 1% | 0% | 0% | 7% | 2% | 4% |

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dmStateUS: State (US)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Pennsylvania | 3% | 3% | 3% | 2% | 0% | 7% | 3% | 4% | 3% |
| Rhode Island | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| South Carolina | 2% | 1% | 2% | 6% | 0% | 1% | 0% | 2% | 2% |
| South Dakota | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Tennessee | 6% | 4% | 8% | 14% G | 0% | 9% | 1% | 4% | 8% |
| Texas | 10% | 11% | 9% | 7% | 8% | 16% | 9% | 8% | 12% |
| Utah | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Vermont | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Virginia | 3% | 7% C | 0% | 1% | 4% | 7% | 2% | 2% | 5% |
| Washington | 3% | 2% | 4% | 7% | 1% | 5% | 0% | 4% | 2% |
| West Virginia | 1% | 1% | 0% | 0% | 0% | 0% | 1% | 0% | 1% |
| Wisconsin | 2% | 4% | 0% | 0% | 0% | 0% | 5% | 0% | 4% |
| Wyoming | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| American Samoa | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Federated States of Micronesia | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Guam | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

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dmStateUS: State (US)

| | | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Marshall Islands | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Northern Mariana Islands | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Palau | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Puerto Rico | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Virgin Islands | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

Table Base: Total Answering

netRegionUS: Census Region (US Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Northeast | 19% | 22% | 15% | 19% | 29% g | 27% g | 9% | 14% | 24% |
| Midwest | 21% | 17% | 25% | 12% | 25% f | 4% | 36% DF | 32% I | 10% |
| South | 37% | 34% | 40% | 43% | 31% | 46% | 29% | 30% | 44% |
| West | 24% | 27% | 20% | 26% | 15% | 23% | 26% | 25% | 22% |
| Non-US State | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |

Table Base: Total Answering

S1: Which of the following financial assets/products, if any, do you currently have or own outside of employer sponsored products? Please also include any that you share with your spouse or partner.

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|--|------------|----------------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| General Checking or Saving (Net) | 75% | 69% | 82% | 42% | 79% D | 79% D | 94% Def | 73% | 76% |
| Checking accounts, traditional savings accounts | 70% | 67% | 72% | 36% | 78% D | 69% D | 90% Df | 67% | 72% |
| CDs or money market accounts | 35% | 28% | 42% | 25% | 21% | 40% | 44% e | 37% | 32% |
| Individual Equity Investments (Net) | 80% | 92% C | 67% | 92% fg | 84% | 71% | 74% | 77% | 83% |
| Individual Equity Investments (Net) | 80% | 92% C | 67% | 92% fg | 84% | 71% | 74% | 77% | 83% |
| Non-Equity Investments (Net) | 76% | 76% | 77% | 52% | 86% D | 74% | 90% D | 67% | 86% H |

continued...

S1: Which of the following financial assets/products, if any, do you currently have or own outside of employer sponsored products? also include any that you share with your spouse or partner.

| | Gender (Final) | | | Age (Net) | | | | Household Income (US Net) | |
|---|----------------|-----------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| General Checking or Saving (Net) | 75% | 69% | 82% | 42% | 79% D | 79% D | 94% Def | 73% | 76% |
| Mutual funds | 48% | 59% C | 37% | 34% | 50% | 53% | 55% | 38% | 59% H |
| Equity stocks | 29% | 44% C | 12% | 19% | 21% | 32% | 37% | 26% | 32% |
| Non-Equity Investments (Net) | 76% | 76% | 77% | 52% | 86% D | 74% | 90% D | 67% | 86% H |
| Fixed or Variable Annuities | 13% | 17% | 9% | 10% | 8% | 3% | 24% F | 12% | 15% |
| Individual Retirement Account (IRA) that is NOT employer sponsored | 60% | 59% | 61% | 23% | 62% D | 66% D | 81% D | 51% | 68% h |
| Term life insurance | 32% | 36% | 27% | 37% | 42% | 21% | 29% | 36% | 27% |
| Other (please specify): | 1% | 1% | 0% | 0% | 3% | 0% | 0% | 0% | 1% |
| None of the above | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% | 0% |
| Count | 3.55 | 3.88 | 3.21 | 2.77 | 3.65 | 3.45 | 4.12 | 3.30 | 3.83 |

continued...

S1: Which of the following financial assets/products, if any, do you currently have or own outside of employer sponsored products? also include any that you share with your spouse or partner.

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|--|------------|-----------------|-------------|-----------------|-----------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Exchange traded funds (ETFs) | 28% | 39% C | 17% | 30% | 28% | 23% | 30% | 19% | 39% H |
| Individual bonds (gov ernment, municipal) | 24% | 22% | 26% | 43% G | 21% | 22% | 14% | 31% | 18% |
| Commodity stocks | 16% | 16% | 17% | 22% g | 31% G | 16% | 7% | 14% | 20% |

Q2: What percentage of your personal savings is invested in equities (e.g., equity mutual funds, stocks, etc.)?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=159 | N=95 * | N=64 * | N=48 * | N=27 ** | N=30 * | N=54 * | N=79 * | N=81 * |
| Total (Unweighted) | N=158 | N=101 | N=57 * | N=44 * | N=45 * | N=31 * | N=38 * | N=74 * | N=83 * |
| Top 2 | 19% | 28% C | 6% | 10% | 14% | 28% | 25% | 13% | 24% |
| 80% to <100% | 5% | 7% | 2% | 0% | 0% | 0% | 13% d | 7% | 3% |
| 60% to <80% | 14% | 21% C | 5% | 9% | 14% | 28% | 12% | 6% | 22% h |
| 40% to <60% | 28% | 28% | 29% | 38% | 31% | 25% | 20% | 31% | 25% |
| Bottom 2 | 53% | 45% | 65% b | 52% | 55% | 47% | 55% | 55% | 50% |
| 20% to <40% | 38% | 34% | 44% | 42% | 31% | 43% | 35% | 40% | 36% |
| 0% to <20% | 15% | 10% | 21% | 10% | 24% | 4% | 20% | 15% | 14% |
| Mean | 2.57 | 2.79 C | 2.23 | 2.49 | 2.36 | 2.78 | 2.62 | 2.50 | 2.63 |
| Median | 2.00 | 3.00 | 2.00 | 2.00 | 2.00 | 3.00 | 2.00 | 2.00 | 2.00 |
| Standard Deviation | 1.06 | 1.10 | 0.90 | 0.82 | 1.02 | 0.92 | 1.30 | 1.06 | 1.06 |

Q3: What are your expected annual returns from equity investments over the next 5 years?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=159 | N=95 * | N=64 * | N=48 * | N=27 ** | N=30 * | N=54 * | N=79 * | N=81 * |
| Total (Unweighted) | N=158 | N=101 | N=57 * | N=44 * | N=45 * | N=31 * | N=38 * | N=74 * | N=83 * |
| Top 2 | 19% | 25% c | 10% | 11% | 21% | 26% | 21% | 21% | 17% |
| >15% | 6% | 6% | 5% | 4% | 8% | 12% | 3% | 4% | 7% |
| 10% to <15% | 13% | 19% c | 4% | 8% | 13% | 14% | 18% | 16% | 11% |
| Mid 3 | 58% | 53% | 65% | 68% e | 40% | 74% e | 49% | 62% | 54% |
| 5% to <10% | 30% | 27% | 34% | 33% | 23% | 22% | 35% | 35% | 24% |
| 0% to <5% | 10% | 7% | 15% | 12% | 3% | 6% | 13% | 7% | 12% |
| -5% to <0% | 18% | 19% | 17% | 23% G | 14% g | 46% eG | 1% | 19% | 17% |
| Bottom 2 | 23% | 22% | 25% | 21% f | 39% F | 0% | 30% F | 18% | 29% |
| -10% to <-5% | 11% | 7% | 16% | 11% | 19% f | 0% | 13% | 8% | 14% |
| <-10% | 12% | 15% | 8% | 10% | 20% f | 0% | 17% f | 10% | 15% |
| Mean | 3.97 | 4.05 | 3.84 | 3.85 | 3.61 | 4.41 | 4.00 | 4.17 | 3.76 |
| Median | 4.00 | 5.00 | 4.00 | 4.00 | 3.00 | 4.00 | 5.00 | 5.00 | 4.00 |
| Standard Deviation | 1.75 | 1.85 | 1.61 | 1.59 | 2.03 | 1.49 | 1.86 | 1.67 | 1.82 |

Q4: Which of the following statements best describes your opinion on investing in the stock market now?

| | | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---|------------|----------------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Bullish, it is a good time to increase investments in the stock market | 32% | 42% C | 21% | 37% g | 67% DFG | 27% | 16% | 24% | 41% h |
| Bearish, it is a good time to decrease investments in the stock market | 19% | 17% | 21% | 32% eG | 9% | 27% g | 10% | 26% i | 12% |
| Neither - it is a time to hold positions in the stock market | 28% | 25% | 31% | 17% | 21% | 15% | 47% DeF | 30% | 26% |
| Not sure | 21% | 15% | 27% | 14% | 3% | 31% E | 27% E | 20% | 21% |

Q5: Based on current market valuations, how do you think most equity stocks are valued?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Undervalued | 25% | 25% | 24% | 16% | 39% d | 17% | 29% | 14% | 36% H |
| Fairly valued | 37% | 38% | 36% | 63% efG | 35% | 35% | 20% | 44% | 30% |
| Overvalued | 23% | 30% c | 15% | 19% | 14% | 33% | 24% | 23% | 23% |
| Not Sure | 15% | 7% | 25% B | 1% | 12% | 14% | 27% D | 18% | 11% |

Q6: Based on current market trends, how confident are you in achieving your investment goals?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|-------------------------------|------------|----------------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 50% | 56% | 43% | 43% | 56% | 49% | 51% | 40% | 59% h |
| Very Confident | 17% | 30% C | 4% | 15% | 36% G | 18% | 10% | 9% | 26% H |
| Fairly Confident | 32% | 26% | 39% | 28% | 20% | 32% | 41% | 31% | 33% |
| Neither/Not Sure (Net) | 27% | 22% | 34% | 36% E | 2% | 20% e | 37% E | 36% i | 19% |
| Neither | 20% | 15% | 24% | 29% E | 2% | 20% e | 20% e | 27% i | 12% |
| Not sure | 8% | 7% | 9% | 7% | 0% | 0% | 17% eF | 9% | 7% |
| Bottom 2 | 23% | 23% | 24% | 21% | 41% G | 30% g | 12% | 24% | 22% |
| Not Very Confident | 18% | 20% | 17% | 13% | 32% G | 30% g | 10% | 17% | 19% |
| Not At All Confident | 5% | 3% | 6% | 8% | 9% | 0% | 2% | 6% | 3% |
| Mean | 3.87 | 4.01 | 3.71 | 3.71 | 3.41 | 3.37 | 4.47 EF | 3.72 | 4.01 |
| Median | 4.00 | 4.00 | 4.00 | 4.00 | 4.00 | 3.00 | 4.00 | 3.00 | 4.00 |
| Standard Deviation | 1.87 | 1.79 | 1.95 | 1.85 | 1.50 | 1.11 | 2.22 | 1.95 | 1.77 |

Q7: What do you think of current interest rates set by the Federal Reserve?

| | | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Too high | 13% | 15% | 10% | 30% FG | 17% g | 6% | 2% | 13% | 13% |
| About right | 46% | 56% c | 36% | 33% | 53% | 51% | 50% | 46% | 47% |
| Too low | 26% | 24% | 28% | 29% | 19% | 16% | 33% | 25% | 27% |
| Not sure | 15% | 5% | 25% B | 8% | 12% | 26% d | 14% | 16% | 13% |

Q8A: Which of the following best describes how interest rates may have affected any large purchase (e.g., buying a house or car) that you may have made in the last 3 months?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|--|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| I have recently made a large purchase primarily influenced by interest rates | 33% | 39% | 27% | 58% fG | 55% G | 30% G | 7% | 27% | 40% |
| I have recently made a large purchase, but interest rates didn't affect that decision | 12% | 13% | 11% | 20% | 7% | 7% | 12% | 15% | 9% |
| I have not made any large purchases in the recent past | 55% | 48% | 62% | 22% | 38% | 63% D | 81% DE | 58% | 51% |

Q8B: Based on the current interest rates, how likely are you to make a large purchase (e.g., buy a house or car) in the next 3 months?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|-----------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 43% | 55% C | 31% | 31% | 56% | 49% | 42% | 33% | 53% H |
| Much more likely | 8% | 15% C | 2% | 4% | 7% | 15% | 9% | 4% | 13% |
| Somewhat more likely | 34% | 40% | 29% | 27% | 49% | 34% | 33% | 29% | 40% |
| Bottom 2 | 57% | 45% | 69% B | 69% | 44% | 51% | 58% | 67% I | 47% |
| Somewhat less likely | 32% | 26% | 39% | 37% | 30% | 21% | 37% | 39% | 26% |
| Much less likely | 25% | 19% | 30% | 32% | 13% | 30% | 21% | 28% | 21% |
| Mean | 2.27 | 2.50 C | 2.02 | 2.04 | 2.49 d | 2.34 | 2.29 | 2.10 | 2.46 h |
| Median | 2.00 | 3.00 | 2.00 | 2.00 | 3.00 | 2.00 | 2.00 | 2.00 | 3.00 |
| Standard Deviation | 0.93 | 0.97 | 0.82 | 0.88 | 0.82 | 1.07 | 0.90 | 0.86 | 0.97 |

Q9: How much influence do the following pieces of information have on your financial/investment decisions?

Top 2 Summary

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Top 2 Summary (Average %) | 56% | 62% | 49% | 41% | 56% | 62% | 62% | 50% | 62% |
| Earnings Reports from Corporations | 60% | 66% | 53% | 47% | 59% | 66% | 65% | 56% | 63% |
| Analyst Reports | 56% | 62% | 51% | 49% | 62% | 63% | 55% | 57% | 55% |
| Federal Reserve Announcements | 62% | 64% | 59% | 47% | 61% | 68% | 68% | 58% | 66% |
| Current Events/News | 57% | 63% | 51% | 25% | 47% | 65% D | 81% DE | 50% | 66% |
| Political Decisions | 54% | 60% | 48% | 42% | 50% | 60% | 61% | 48% | 61% |
| Macro Economic Trends | 45% | 61% C | 29% | 37% | 60% | 48% | 44% | 33% | 59% H |

Q9: How much influence do the following pieces of information have on your financial/investment decisions?

Earnings Reports from Corporations

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 60% | 66% | 53% | 47% | 59% | 66% | 65% | 56% | 63% |
| Strong influence | 23% | 32% C | 14% | 14% | 22% | 24% | 31% | 20% | 27% |
| Moderate Influence | 36% | 34% | 39% | 34% | 37% | 42% | 34% | 36% | 36% |
| Bottom 2 | 40% | 34% | 47% | 53% | 41% | 34% | 35% | 44% | 37% |
| Minimal Influence | 22% | 18% | 26% | 31% | 12% | 14% | 25% | 25% | 19% |
| No Influence | 18% | 16% | 20% | 21% | 30% g | 20% | 10% | 19% | 18% |
| Mean | 2.65 | 2.81 c | 2.47 | 2.40 | 2.51 | 2.70 | 2.85 d | 2.58 | 2.72 |
| Median | 3.00 | 3.00 | 3.00 | 2.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 |
| Standard Deviation | 1.03 | 1.06 | 0.98 | 0.98 | 1.15 | 1.06 | 0.97 | 1.02 | 1.05 |

Q9: How much influence do the following pieces of information have on your financial/investment decisions?

Analyst Reports

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 56% | 62% | 51% | 49% | 62% | 63% | 55% | 57% | 55% |
| Strong influence | 19% | 24% | 12% | 16% | 34% g | 21% | 12% | 10% | 27% H |
| Moderate Influence | 38% | 37% | 38% | 33% | 28% | 43% | 43% | 47% i | 28% |
| Bottom 2 | 44% | 38% | 49% | 51% | 38% | 37% | 45% | 43% | 45% |
| Minimal Influence | 28% | 28% | 28% | 25% | 20% | 34% | 29% | 20% | 36% h |
| No Influence | 16% | 11% | 22% | 26% F | 18% | 3% | 15% | 23% i | 9% |
| Mean | 2.59 | 2.75 c | 2.42 | 2.39 | 2.77 | 2.81 | 2.52 | 2.45 | 2.74 |
| Median | 3.00 | 3.00 | 3.00 | 2.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 |
| Standard Deviation | 0.97 | 0.95 | 0.97 | 1.05 | 1.12 | 0.80 | 0.90 | 0.96 | 0.96 |

Q9: How much influence do the following pieces of information have on your financial/investment decisions?

Federal Reserve Announcements

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 62% | 64% | 59% | 47% | 61% | 68% | 68% | 58% | 66% |
| Strong influence | 22% | 25% | 18% | 22% | 19% | 21% | 23% | 18% | 26% |
| Moderate Influence | 40% | 39% | 41% | 25% | 42% | 48% | 45% | 40% | 40% |
| Bottom 2 | 38% | 36% | 41% | 53% | 39% | 32% | 32% | 42% | 34% |
| Minimal Influence | 28% | 28% | 28% | 39% | 29% | 22% | 24% | 31% | 25% |
| No Influence | 10% | 8% | 13% | 14% | 10% | 10% | 8% | 11% | 9% |
| Mean | 2.73 | 2.81 | 2.65 | 2.56 | 2.71 | 2.79 | 2.83 | 2.65 | 2.83 |
| Median | 3.00 | 3.00 | 3.00 | 2.00 | 3.00 | 3.00 | 3.00 | 3.00 | 3.00 |
| Standard Deviation | 0.92 | 0.91 | 0.92 | 1.00 | 0.91 | 0.89 | 0.88 | 0.91 | 0.92 |

Q9: How much influence do the following pieces of information have on your financial/investment decisions?

Current Events/News

| | | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 57% | 63% | 51% | 25% | 47% | 65% D | 81% DE | 50% | 66% |
| Strong influence | 22% | 32% C | 12% | 11% | 30% | 29% | 22% | 19% | 26% |
| Moderate Influence | 35% | 31% | 39% | 14% | 17% | 35% d | 58% DE | 31% | 40% |
| Bottom 2 | 43% | 37% | 49% | 75% FG | 53% G | 35% | 19% | 50% | 34% |
| Minimal Influence | 32% | 31% | 34% | 54% G | 35% g | 34% | 15% | 34% | 31% |
| No Influence | 10% | 6% | 15% | 21% Fg | 18% f | 1% | 4% | 16% I | 3% |
| Mean | 2.69 | 2.90 C | 2.48 | 2.16 | 2.60 | 2.92 D | 2.98 D | 2.53 | 2.88 H |
| Median | 3.00 | 3.00 | 3.00 | 2.00 | 2.00 | 3.00 | 3.00 | 2.00 | 3.00 |
| Standard Deviation | 0.93 | 0.92 | 0.90 | 0.89 | 1.11 | 0.83 | 0.75 | 0.99 | 0.83 |

Q9: How much influence do the following pieces of information have on your financial/investment decisions?

Political Decisions

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 54% | 60% | 48% | 42% | 50% | 60% | 61% | 48% | 61% |
| Strong influence | 16% | 23% C | 8% | 12% | 27% | 14% | 14% | 10% | 23% h |
| Moderate Influence | 38% | 37% | 40% | 30% | 23% | 45% | 47% e | 38% | 38% |
| Bottom 2 | 46% | 40% | 52% | 58% | 50% | 40% | 39% | 52% | 39% |
| Minimal Influence | 27% | 22% | 31% | 27% | 24% | 29% | 26% | 32% | 21% |
| No Influence | 19% | 18% | 21% | 31% g | 26% | 11% | 12% | 20% | 19% |
| Mean | 2.51 | 2.66 | 2.35 | 2.23 | 2.50 | 2.63 | 2.64 | 2.38 | 2.65 |
| Median | 3.00 | 3.00 | 2.00 | 2.00 | 2.00 | 3.00 | 3.00 | 2.00 | 3.00 |
| Standard Deviation | 0.98 | 1.03 | 0.90 | 1.03 | 1.17 | 0.87 | 0.88 | 0.92 | 1.03 |

Q9: How much influence do the following pieces of information have on your financial/investment decisions?

Macro Economic Trends

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Top 2 | 45% | 61% C | 29% | 37% | 60% | 48% | 44% | 33% | 59% H |
| Strong influence | 14% | 16% | 11% | 8% | 19% | 17% | 14% | 11% | 17% |
| Moderate Influence | 32% | 44% C | 18% | 29% | 40% | 31% | 30% | 22% | 42% H |
| Bottom 2 | 55% | 39% | 71% B | 63% | 40% | 52% | 56% | 67% I | 41% |
| Minimal Influence | 31% | 24% | 39% | 40% | 20% | 29% | 30% | 34% | 27% |
| No Influence | 24% | 16% | 32% b | 22% | 20% | 23% | 26% | 33% I | 14% |
| Mean | 2.35 | 2.61 C | 2.08 | 2.23 | 2.59 | 2.41 | 2.31 | 2.11 | 2.61 H |
| Median | 2.00 | 3.00 | 2.00 | 2.00 | 3.00 | 2.00 | 2.00 | 2.00 | 3.00 |
| Standard Deviation | 0.99 | 0.94 | 0.97 | 0.89 | 1.03 | 1.03 | 1.01 | 0.99 | 0.93 |

Q10: Which of the following do you think are among the best investment(s) right now?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|--|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| CDs or money market accounts | 29% | 31% | 27% | 36% | 25% | 24% | 29% | 24% | 35% |
| Equity Investments | 77% | 85% C | 69% | 82% | 77% | 84% | 69% | 76% | 78% |
| Equity stocks | 32% | 37% | 26% | 30% | 36% | 25% | 35% | 31% | 33% |
| Individual bonds (gov ernment, municipal) | 21% | 23% | 20% | 35% f | 16% | 14% | 19% | 28% | 15% |
| Commodity stocks | 24% | 30% | 17% | 30% g | 45% G | 25% | 10% | 19% | 30% |
| Mutual funds | 42% | 48% | 35% | 29% | 53% | 58% D | 36% | 40% | 45% |
| Exchange traded funds (ETFs) | 19% | 29% C | 8% | 14% | 23% | 30% | 14% | 10% | 29% H |
| Non Equity Investments | 43% | 42% | 44% | 43% | 50% | 50% | 35% | 47% | 39% |
| Fixed or Variable Annuities | 17% | 17% | 17% | 22% | 22% | 24% g | 8% | 17% | 18% |

continued...

Q10: Which of the following do you think are among the best investment(s) right now?

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|--|------------|----------------|-------------|------------|------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Individual Retirement Account (IRA) that is NOT employer sponsored | 31% | 31% | 31% | 27% | 28% | 47% | 27% | 36% | 27% |
| Other (please specify): | 1% | 1% | 0% | 0% | 2% | 0% | 0% | 0% | 1% |
| Just keep my money in Checking accounts or traditional savings accounts | 7% | 1% | 12% B | 1% | 2% | 4% | 15% d | 6% | 7% |
| None of the above | 3% | 5% | 1% | 4% | 0% | 2% | 5% | 6% | 0% |
| Count | 2.26 | 2.54 | 1.95 | 2.27 | 2.52 | 2.53 | 1.97 | 2.15 | 2.39 |

netEduUS: Education (US Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Less than HS degree | 3% | 3% | 3% | 6% | 1% | 0% | 3% | 5% | 0% |
| HS degree to less than 4 year college degree | 47% | 35% | 59% B | 63% EF | 9% | 30% e | 62% EF | 70% I | 23% |
| 4 year college degree or more | 50% | 62% C | 38% | 32% | 89% DG | 70% DG | 35% | 24% | 77% H |

Table Base: Total Answering

netHhIncUS: Household Income (US Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|-----------------------------|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Less than \$15,000 | 0% | 1% | 0% | 1% | 0% | 0% | 0% | 1% | 0% |
| \$15,000-\$24,999 | 1% | 1% | 2% | 5% | 0% | 0% | 0% | 3% | 0% |
| \$25,000-\$34,999 | 7% | 2% | 12% B | 8% | 4% | 0% | 12% | 14% I | 0% |
| \$35,000-\$49,999 | 7% | 7% | 8% | 7% | 0% | 10% | 9% | 14% I | 0% |
| \$50,000-\$74,999 | 21% | 19% | 22% | 23% E | 2% | 10% | 34% Ef | 41% I | 0% |
| \$75,000-\$99,999 | 14% | 10% | 19% | 22% g | 18% | 16% | 5% | 28% I | 0% |
| \$100,000 or more | 48% | 60% C | 36% | 34% | 76% DG | 62% dg | 38% | 0% | 100% H |
| Prefer not to answer | 1% | 0% | 1% | 0% | 0% | 1% | 1% | 0% | 0% |

Table Base: Total Answering

netRaceUS: Race (US Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------------|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Hispanic | 15% | 15% | 15% | 36% EG | 5% | 23% eG | 0% | 21% | 9% |
| Black (Not Hispanic) | 8% | 6% | 10% | 20% efg | 2% | 3% | 5% | 6% | 10% |
| Asian (Not Hispanic) | 9% | 9% | 10% | 2% | 3% | 26% DEg | 7% | 5% | 15% h |
| All Other (Not Hispanic) | 68% | 70% | 65% | 42% | 91% DF | 47% | 87% DF | 69% | 66% |

Table Base: Total Answering

netNetUse: Internet Usage (Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| 4 hours or less | 30% | 30% | 29% | 62% FG | 49% FG | 13% | 7% | 35% | 24% |
| 5-9 hours | 19% | 12% | 26% b | 25% g | 23% | 25% | 9% | 23% | 15% |
| 10-19 hours | 27% | 35% c | 18% | 5% | 17% | 17% | 53% DEF | 22% | 32% |
| 20 hours or more | 24% | 22% | 27% | 7% | 10% | 44% DE | 31% De | 21% | 28% |

Table Base: Total Answering

netMarStat: Marital Status (Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|------------------------------------|------------|----------------|-------------|------------|------------|------------|-----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Never married | 23% | 17% | 29% | 59% EFG | 14% | 7% | 11% | 33% I | 13% |
| Married/Living with partner | 63% | 73% C | 53% | 41% | 82% D | 71% D | 65% d | 46% | 81% H |
| Divorced/Separated/Widowed | 14% | 10% | 18% | 0% | 4% | 22% De | 24% De | 22% I | 6% |

Table Base: Total Answering

dmAdultHh: Adults in Household

| | | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|-------------|------------|------------|----------|----------------------------|---------------------------|
| | Total A | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Mean | 2.53 | 2.44 | 2.63 | 3.98 efG | 2.14 | 2.08 | 1.94 | 2.68 | 2.37 |
| Median | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 | 2.00 |
| Standard Deviation | 2.70 | 2.68 | 2.72 | 4.80 | 0.86 | 0.86 | 1.00 | 3.64 | 1.04 |

dmChildHh: Children in Household

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|-------------|------------|----------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% | 100% |
| Mean | 0.80 | 0.96 | 0.64 | 1.08 G | 1.75 dFG | 0.92 G | 0.12 | 0.59 | 1.03 H |
| Median | 0.00 | 0.00 | 0.00 | 1.00 | 2.00 | 1.00 | 0.00 | 0.00 | 1.00 |
| Standard Deviation | 1.08 | 1.16 | 0.98 | 1.11 | 1.19 | 1.04 | 0.43 | 0.98 | 1.15 |

netHhSize: Size of Household (Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|---------------------------|------------|----------------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| 1 HH member | 16% | 11% | 22% | 9% | 11% | 11% | 28% d | 27% I | 6% |
| 2 HH members | 30% | 34% | 25% | 22% e | 2% | 18% | 55% DEF | 32% | 28% |
| 3 HH members | 22% | 21% | 23% | 27% | 13% | 37% eG | 13% | 20% | 24% |
| 4 HH members | 17% | 24% c | 11% | 9% | 54% DfG | 27% G | 1% | 7% | 28% H |
| 5+ HH members | 14% | 11% | 18% | 34% FG | 20% G | 7% | 2% | 13% | 15% |

Table Base: Total Answering

netEmploy: Employment Status (Net)

| | Total A | Gender (Final) | | Age (Net) | | | | Household Income (US Net) | |
|--|------------|----------------|-------------|------------|------------|------------|------------|----------------------------|---------------------------|
| | | Male B | Female C | 18-34 D | 35-44 E | 45-54 F | 55+ G | Less than \$100,00 H | \$100,000 or more I |
| Total | N=200 | N=103 | N=97 * | N=52 * | N=32 * | N=43 * | N=73 * | N=102 | N=97 * |
| Total (Unweighted) | N=200 | N=116 | N=84 * | N=48 * | N=53 * | N=43 * | N=56 * | N=99 * | N=98 * |
| Employed (FT, PT or Self) | 76% | 85% C | 66% | 83% G | 100% dG | 95% G | 48% | 59% | 93% H |
| All Other (Unemployed, Retired, Student, Homemaker, etc.) | 24% | 15% | 34% B | 17% e | 0% | 5% | 52% DEF | 41% I | 7% |

Table Base: Total Answering