

090320 - HOD FLASH (24 Hour) Survey

QS2Q1: 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. Please select all that apply.

	Total (A)	Gender		Age					Male Age					Female Age					Region			
		Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
<b>Total</b>	N=1036	N=499	N=537	N=307	N=171	N=167	N=173	N=218	N=153	N=84	N=82	N=82	N=99	N=154	N=86	N=86	N=91	N=120	N=182	N=391	N=216	N=246
<b>Total (Unweighted)</b>	N=1036	N=455	N=581	N=337	N=168	N=172	N=164	N=195	N=136	N=101	N=86	N=62	N=70	N=201	N=67	N=86	N=102	N=125	N=192	N=392	N=197	N=255
<b>General Checking and Savings (Net)</b>	62%	63%	62%	47%	48%	64%	77%	81%	49%	51%	62%	77%	82%	45%	45%	66%	77%	80%	63%	61%	61%	64%
Checking accounts, traditional savings accounts	61%	62%	60%	46%	48%	62%	75%	79%	48%	50%	59%	77%	82%	44%	45%	65%	73%	77%	61%	59%	61%	63%
CDs or money market accounts	17%	19%	15%	7%	14%	14%	22%	30%	8%	19%	23%	24%	27%	7%	9%	4%	20%	33%	21%	14%	13%	22%
<b>Equity Investors (Net)</b>	50%	59%	41%	44%	47%	47%	49%	62%	57%	65%	59%	46%	67%	32%	29%	36%	52%	58%	56%	47%	44%	55%
Individual Retirement Account (IRA) that is NOT a	26%	27%	26%	15%	17%	24%	34%	44%	19%	16%	30%	25%	48%	12%	18%	19%	43%	41%	35%	22%	22%	31%
Mutual funds	23%	28%	17%	14%	20%	24%	21%	38%	18%	30%	28%	24%	45%	9%	9%	19%	19%	32%	25%	21%	23%	22%
Equity stocks	15%	22%	9%	12%	16%	15%	10%	24%	18%	23%	23%	8%	39%	7%	9%	8%	12%	12%	18%	12%	19%	16%
Fixed or Variable Annuities	11%	13%	9%	6%	5%	4%	13%	27%	7%	8%	2%	15%	32%	5%	3%	5%	10%	23%	11%	11%	11%	12%
Exchange traded funds (ETFs)	11%	14%	7%	9%	12%	7%	6%	18%	13%	13%	11%	5%	27%	5%	11%	3%	7%	11%	12%	11%	12%	7%
Individual bonds (government, municipal)	10%	12%	9%	7%	11%	7%	7%	19%	9%	14%	12%	7%	19%	6%	9%	1%	6%	19%	12%	8%	12%	11%
Commodity stocks	10%	13%	7%	7%	11%	11%	13%	9%	9%	15%	18%	16%	10%	5%	6%	5%	10%	9%	13%	9%	4%	14%
Term life insurance	22%	22%	22%	15%	25%	27%	28%	23%	16%	28%	29%	26%	18%	13%	22%	24%	30%	28%	30%	22%	22%	18%
Other	2%	3%	1%	0%	3%	0%	2%	4%	0%	4%	0%	5%	6%	0%	1%	0%	0%	2%	1%	2%	3%	2%
None	19%	15%	23%	28%	21%	17%	13%	12%	21%	13%	14%	10%	15%	36%	30%	19%	16%	10%	18%	20%	19%	19%
<b>Count</b>	2.26	2.49	2.05	1.67	2.02	2.11	2.44	3.27	1.86	2.33	2.51	2.43	3.66	1.48	1.72	1.73	2.45	2.95	2.56	2.10	2.19	2.37

\* Table Base: US RESPONDENTS

QS2Q1: 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. Please select all that apply.

	Total (A)	Household Income			Education			Employed		Children in HH		Parent of Child Under :		Home Ownership		Marital Status		Race/Ethnicity			
		Less than \$50K	\$50K - \$74.5K	\$75K - \$95	\$100K+ (E)	HS or Less	Some Coll	College Grad+ (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowner	Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)	Hispanic (U)
<b>Total</b>	N=1036	N=312	N=171	N=135	N=368	N=355	N=334	N=207	N=580	N=456	N=402	N=634	N=358	N=678	N=746	N=257	N=506	N=530	N=619	N=116	N=168
<b>Total (Unweighted)</b>	N=1036	N=389	N=219	N=148	N=230	N=322	N=337	N=241	N=588	N=448	N=394	N=642	N=356	N=680	N=721	N=283	N=489	N=547	N=725	N=111	N=97
<b>General Checking and Savings (Net)</b>	62%	53%	59%	77%	69%	53%	63%	75%	64%	60%	52%	69%	53%	67%	66%	55%	71%	63%	70%	52%	48%
Checking accounts, traditional savings accounts	61%	52%	58%	75%	67%	52%	61%	72%	61%	60%	50%	68%	50%	66%	64%	54%	70%	52%	69%	52%	48%
CDs or money market accounts	17%	8%	14%	24%	24%	11%	13%	27%	19%	14%	15%	19%	15%	18%	21%	6%	20%	13%	20%	7%	9%
<b>Equity Investors (Net)</b>	50%	31%	48%	62%	65%	39%	44%	66%	57%	40%	53%	48%	55%	47%	55%	39%	58%	41%	52%	49%	45%
Individual Retirement Account (IRA) that is NOT a	26%	11%	27%	34%	36%	18%	25%	38%	26%	27%	23%	28%	23%	28%	31%	17%	35%	28%	31%	22%	15%
Mutual funds	23%	13%	20%	24%	33%	13%	21%	36%	28%	16%	18%	25%	19%	24%	26%	16%	29%	17%	25%	19%	18%
Equity stocks	15%	7%	14%	17%	25%	7%	13%	26%	18%	12%	17%	14%	19%	14%	19%	8%	18%	13%	17%	11%	12%
Fixed or Variable Annuities	11%	6%	9%	13%	16%	6%	10%	18%	9%	13%	6%	14%	7%	13%	13%	7%	16%	7%	14%	6%	5%
Exchange traded funds (ETFs)	11%	5%	9%	12%	17%	5%	12%	14%	12%	9%	13%	9%	14%	9%	12%	7%	12%	9%	11%	15%	8%
Individual bonds (government, municipal)	10%	4%	8%	15%	16%	5%	11%	13%	10%	10%	10%	10%	10%	10%	11%	8%	14%	7%	13%	9%	3%
Commodity stocks	10%	5%	8%	10%	15%	7%	9%	12%	12%	6%	11%	8%	12%	8%	11%	7%	12%	7%	9%	11%	13%
Term life insurance	22%	12%	21%	29%	30%	18%	20%	27%	26%	17%	31%	17%	31%	18%	25%	17%	32%	13%	25%	27%	14%
Other	2%	1%	1%	1%	3%	1%	1%	3%	1%	2%	1%	2%	1%	2%	2%	1%	2%	1%	2%	1%	0%
None	19%	29%	23%	8%	9%	26%	23%	11%	12%	28%	17%	20%	14%	22%	14%	27%	13%	26%	17%	20%	23%
<b>Count</b>	2.26	1.52	2.13	2.63	2.91	1.70	2.18	2.97	2.34	2.16	2.10	2.37	2.15	2.33	2.49	1.74	2.73	1.82	2.54	1.99	1.68

\* Table Base: US RESPONDENTS

QS2Q2: How has your equity portfolio investment strategy changed since the start of the coronavirus pandemic in comparison to prior years? Compared to prior years, since the start of the coronavirus pandemic I have been investing...

	Total (A)	Gender		Age					Male Age					Female Age					Region			
		Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
<b>Total</b>	N=515	N=293	N=222	N=136	N=80	N=78	N=85	N=135	N=87	N=55	N=48	N=38	N=66	N=49	N=25	N=30	N=47	N=69	N=102	N=182	N=94	N=136
<b>Total (Unweighted)</b>	N=488	N=252	N=236	N=141	N=86	N=81	N=70	N=110	N=73	N=64	N=48	N=25	N=42	N=68	N=22	N=33	N=45	N=68	N=100	N=174	N=85	N=129
<b>Significantly/Somewhat More (Net)</b>	36%	42%	28%	47%	69%	41%	22%	10%	45%	79%	50%	26%	8%	51%	47%	28%	18%	12%	38%	40%	27%	35%
Significantly more of my portfolio into stocks and e	23%	27%	18%	34%	48%	18%	14%	5%	37%	55%	21%	16%	0%	30%	34%	12%	12%	11%	23%	26%	21%	20%
Somewhat more of my portfolio into stocks and e	13%	15%	10%	13%	21%	24%	8%	5%	8%	25%	28%	10%	8%	21%	13%	17%	6%	1%	15%	13%	6%	16%
No more or less of my portfolio into stocks and equiti	48%	43%	54%	34%	16%	40%	66%	74%	35%	8%	33%	64%	79%	31%	35%	52%	67%	69%	50%	41%	54%	50%
<b>Significantly/Somewhat Less (Net)</b>	16%	15%	18%	19%	15%	18%	13%	16%	20%	13%	17%	10%	13%	17%	18%	20%	15%	19%	12%	19%	18%	15%
Somewhat less of my portfolio into stocks and e	9%	9%	9%	12%	13%	7%	8%	7%	15%	10%	5%	5%	7%	5%	18%	11%	10%	7%	9%	11%	10%	7%
Significantly less of my portfolio into stocks and e	7%	6%	9%	7%	2%	11%	5%	9%	5%	3%	12%	5%	5%	12%	0%	10%	5%	12%	3%	8%	9%	7%

\* Table Base: EQUITY INVESTORS

QS2Q2: How has your equity portfolio investment strategy changed since the start of the coronavirus pandemic in comparison to prior years? Compared to prior years, since the start of the coronavirus pandemic I have been investing...

	Total (A)	Household Income			Education			Employed		Children in HH		Parent of Child Under :		Home Ownership		Marital Status		Race/Ethnicity			
		Less than \$50K	\$50K - \$74.5K	\$75K - \$95	\$100K+ (E)	HS or Less	Some Coll	College Grad+ (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowner	Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)	Hispanic (U)
<b>Total</b>	N=515	N=97	N=82	N=84	N=237	N=139	N=148	N=136	N=333	N=182	N=211	N=303	N=196	N=318	N=412	N=101	N=296	N=219	N=322	N=57	N=76
<b>Total (Unweighted)</b>	N=488	N=123	N=111	N=93	N=147	N=115	N=135	N=148	N=325	N=163	N=200	N=288	N=191	N=297	N=382	N=104	N=270	N=218	N=361	N=45	N=41
<b>Significantly/Somewhat More (Net)</b>	36%	44%	29%	33%	38%	42%	29%	34%	47%	15%	52%	24%	57%	23%	34%	44%	31%	42%	29%	47%	55%
Significantly more of my portfolio into stocks and	23%	26%	16%	13%	29%	25%	18%	25%	31%	9%	37%	13%	42%	12%	22%	25%	21%	25%	16%	35%	38%
Somewhat more of my portfolio into stocks and e	13%	18%	13%	20%	9%	17%	11%	10%	17%	5%	15%	11%	15%	11%	11%	19%	10%	17%	13%	13%	17%
No more or less of my portfolio into stocks and equiti	48%	40%	55%	48%	46%	43%	57%	44%	37%	68%	33%	58%	30%	59%	50%	39%	54%	39%	54%	34%	33%
<b>Significantly/Somewhat Less (Net)</b>	16%	16%	16%	18%	16%	15%	15%	22%	16%	18%	15%	17%	13%	18%	16%	17%	15%	19%	12%	19%	13%
Somewhat less of my portfolio into stocks and e	9%	5%	8%	10%	11%	4%	8%	15%	11%	7%	10%	9%	8%	10%	9%	12%	9%	10%	11%	14%	3%
Significantly less of my portfolio into stocks and e	7%	11%	8%	8%	5%	10%	7%	7%	5%	11%	5%	9%	5%	8%	8%	5%	6%	9%	6%	5%	9%

\* Table Base: EQUITY INVESTORS

QS2Q3: How has your individual stock trading strategy changed since the start of the coronavirus pandemic in comparison to prior years? Compared to prior years, since the start of the coronavirus pandemic I have been executing...

	Gender		Age					Male Age					Female Age					Region				
	Total (A)	Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
<b>Total</b>	N=515	N=293	N=222	N=136	N=80	N=78	N=85	N=135	N=87	N=55	N=48	N=38	N=66	N=49	N=25	N=30	N=47	N=69	N=102	N=182	N=94	N=136
<b>Total (Unweighted)</b>	N=488	N=252	N=236	N=141	N=86	N=81	N=70	N=110	N=73	N=64	N=48	N=25	N=42	N=68	N=22	N=33	N=45	N=68	N=100	N=174	N=85	N=129
<b>Significantly/Somewhat More (Net)</b>	33%	38%	25%	43%	61%	41%	19%	10%	39%	72%	53%	27%	6%	50%	39%	22%	13%	13%	35%	36%	29%	31%
Significantly more individual stock trades	17%	20%	12%	22%	35%	23%	9%	2%	25%	39%	27%	8%	0%	16%	27%	17%	10%	4%	16%	19%	10%	20%
Somewhat more individual stock trades	16%	18%	13%	21%	26%	18%	10%	7%	14%	32%	26%	19%	6%	35%	12%	5%	3%	8%	18%	17%	19%	11%
No more or less individual stock trades	50%	46%	56%	32%	19%	44%	72%	77%	36%	15%	36%	59%	85%	27%	27%	57%	82%	68%	47%	46%	56%	54%
<b>Significantly/Somewhat Fewer (Net)</b>	17%	15%	19%	25%	19%	15%	9%	14%	26%	13%	11%	14%	8%	23%	33%	21%	5%	19%	18%	18%	15%	15%
Somewhat fewer individual stock trades	10%	9%	11%	13%	14%	7%	7%	7%	10%	11%	7%	11%	5%	20%	20%	7%	3%	10%	17%	17%	7%	10%
Significantly fewer individual stock trades	7%	7%	8%	11%	6%	8%	2%	7%	16%	2%	4%	2%	3%	3%	13%	14%	2%	10%	1%	11%	8%	5%

\* Table Base: EQUITY INVESTORS

QS3Q3: How has your individual stock trading strategy changed since the start of the coronavirus pandemic in comparison to prior years? Compared to prior years, since the start of the coronavirus pandemic I have been executing...

	Household Income					Education			Employed		Children in HH		Parent of Child Under :		Home Ownership		Marital Status		Race/Ethnicity		
	Total (A)	Less than \$50K - \$74. \$75K - \$95 \$100K+ (E)				HS or Les	Some Coll	College Grad+ (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowner	Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)	Hispanic (U)
<b>Total</b>	N=515	N=97	N=82	N=84	N=237	N=139	N=148	N=136	N=333	N=182	N=211	N=303	N=196	N=318	N=412	N=101	N=296	N=219	N=322	N=57	N=76
<b>Total (Unweighted)</b>	N=488	N=123	N=111	N=93	N=147	N=115	N=135	N=148	N=325	N=163	N=200	N=288	N=191	N=297	N=382	N=104	N=270	N=218	N=361	N=45	N=41
<b>Significantly/Somewhat More (Net)</b>	33%	42%	32%	28%	33%	39%	24%	33%	43%	15%	48%	22%	51%	22%	30%	43%	28%	39%	26%	36%	60%
Significantly more individual stock trades	17%	24%	11%	10%	19%	19%	13%	17%	23%	6%	25%	11%	25%	11%	15%	25%	14%	20%	10%	25%	36%
Somewhat more individual stock trades	16%	18%	21%	18%	14%	20%	11%	17%	20%	9%	23%	11%	25%	10%	16%	18%	14%	19%	16%	10%	24%
No more or less individual stock trades	50%	45%	54%	55%	47%	52%	60%	46%	40%	68%	35%	61%	32%	61%	51%	47%	55%	44%	57%	51%	20%
<b>Significantly/Somewhat Fewer (Net)</b>	17%	14%	14%	16%	20%	10%	16%	21%	17%	18%	17%	17%	17%	17%	19%	10%	17%	17%	17%	13%	20%
Somewhat fewer individual stock trades	10%	8%	6%	14%	11%	8%	8%	14%	11%	7%	13%	8%	13%	8%	10%	7%	9%	11%	9%	11%	11%
Significantly fewer individual stock trades	7%	6%	8%	3%	9%	2%	8%	7%	6%	10%	4%	9%	4%	9%	8%	3%	6%	8%	6%	8%	9%

\* Table Base: EQUITY INVESTORS

QS3Q4: In the last month, which of the following publicly traded firms have you traded individual shares from? Please select all that apply.

	Gender		Age					Male Age					Female Age					Region				
	Total (A)	Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
<b>Total</b>	N=515	N=293	N=222	N=136	N=80	N=78	N=85	N=135	N=87	N=55	N=48	N=38	N=66	N=49	N=25	N=30	N=47	N=69	N=102	N=182	N=94	N=136
<b>Total (Unweighted)</b>	N=488	N=252	N=236	N=141	N=86	N=81	N=70	N=110	N=73	N=64	N=48	N=25	N=42	N=68	N=22	N=33	N=45	N=68	N=100	N=174	N=85	N=129
Amazon (AMZN)	21%	26%	14%	29%	52%	20%	12%	2%	30%	54%	24%	21%	3%	27%	48%	12%	4%	1%	28%	23%	17%	16%
Facebook (FB)	19%	21%	17%	22%	44%	22%	14%	2%	18%	48%	26%	9%	4%	28%	38%	15%	19%	0%	28%	18%	16%	16%
Netflix (NFLX)	18%	23%	12%	28%	40%	19%	3%	4%	30%	47%	25%	5%	2%	24%	23%	9%	2%	6%	21%	15%	18%	20%
Apple (AAPL)	17%	21%	12%	25%	33%	21%	10%	2%	24%	41%	25%	15%	2%	27%	15%	13%	7%	2%	18%	18%	15%	17%
Microsoft (MSFT)	13%	17%	8%	19%	22%	18%	8%	3%	24%	25%	23%	9%	3%	10%	17%	10%	7%	3%	13%	15%	12%	11%
Tesla (TSLA)	11%	12%	10%	19%	17%	10%	5%	4%	18%	14%	16%	8%	2%	21%	22%	0%	3%	7%	8%	13%	12%	10%
Twitter (TWTR)	8%	9%	6%	11%	21%	8%	3%	0%	9%	24%	9%	7%	0%	16%	16%	6%	1%	0%	12%	9%	8%	4%
Alphabet (GOOGL)	7%	9%	6%	10%	15%	9%	4%	1%	11%	9%	14%	6%	2%	9%	29%	1%	2%	0%	12%	10%	3%	4%
Uber (UBER)	5%	6%	5%	5%	12%	5%	8%	1%	5%	16%	7%	0%	0%	5%	3%	2%	13%	1%	9%	7%	3%	4%
Snapchat (SNAP)	5%	5%	6%	14%	7%	1%	2%	0%	8%	11%	2%	0%	0%	25%	0%	0%	4%	0%	9%	5%	5%	4%
None of these	53%	48%	59%	31%	16%	49%	74%	85%	34%	10%	40%	74%	88%	27%	28%	64%	75%	82%	48%	52%	56%	56%
<b>Count</b>	1.79	1.96	1.56	2.13	2.80	1.81	1.44	1.05	2.10	2.99	2.12	1.54	1.06	2.19	2.39	1.33	1.36	1.03	2.07	1.83	1.65	1.62

\* Table Base: EQUITY INVESTORS

QS3Q4: In the last month, which of the following publicly traded firms have you traded individual shares from? Please select all that apply.

	Household Income					Education			Employed		Children in HH		Parent of Child Under :		Home Ownership		Marital Status		Race/Ethnicity		
	Total (A)	Less than \$50K - \$74. \$75K - \$95 \$100K+ (E)				HS or Les	Some Coll	College Grad+ (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowner	Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)	Hispanic (U)
<b>Total</b>	N=515	N=97	N=82	N=84	N=237	N=139	N=148	N=136	N=333	N=182	N=211	N=303	N=196	N=318	N=412	N=101	N=296	N=219	N=322	N=57	N=76
<b>Total (Unweighted)</b>	N=488	N=123	N=111	N=93	N=147	N=115	N=135	N=148	N=325	N=163	N=200	N=288	N=191	N=297	N=382	N=104	N=270	N=218	N=361	N=45	N=41
Amazon (AMZN)	21%	21%	17%	18%	24%	20%	17%	22%	29%	6%	34%	12%	34%	13%	19%	28%	6%	19%	24%	20%	22%
Facebook (FB)	19%	18%	17%	22%	20%	20%	10%	23%	26%	6%	29%	12%	31%	11%	17%	26%	19%	19%	17%	27%	22%
Netflix (NFLX)	18%	23%	19%	8%	20%	18%	12%	16%	25%	6%	31%	9%	32%	10%	17%	21%	14%	23%	15%	21%	36%
Apple (AAPL)	17%	23%	16%	15%	17%	17%	13%	19%	24%	5%	27%	10%	28%	11%	15%	27%	17%	18%	15%	8%	29%
Microsoft (MSFT)	13%	9%	12%	15%	16%	12%	9%	15%	17%	7%	23%	7%	23%	8%	14%	11%	12%	15%	14%	20%	3%
Tesla (TSLA)	11%	12%	16%	9%	11%	11%	10%	14%	12%	9%	14%	9%	14%	10%	11%	12%	9%	14%	11%	5%	16%
Twitter (TWTR)	8%	6%	6%	7%	10%	4%	6%	8%	12%	1%	15%	4%	15%	4%	8%	10%	10%	5%	9%	14%	2%
Alphabet (GOOGL)	7%	8%	7%	2%	10%	5%	6%	10%	10%	2%	13%	3%	14%	3%	8%	7%	9%	5%	8%	8%	9%
Uber (UBER)	5%	4%	4%	7%	6%	5%	4%	6%	8%	1%	8%	4%	9%	3%	5%	7%	6%	5%	6%	12%	3%
Snapchat (SNAP)	5%	6%	9%	5%	4%	3%	8%	4%	8%	2%	12%	1%	12%	2%	6%	5%	4%	7%	4%	3%	8%
None of these	53%	44%	53%	51%	55%	47%	64%	49%	40%	76%	32%	67%	28%	68%	56%	38%	58%	32%	60%	44%	31%
<b>Count</b>	1.79	1.74	1.77	1.59	1.93	1.64	1.60	1.86	2.10	1.21	2.37	1.39	2.40	1.41	1.76	1.91	1.78	1.80	1.77	1.86	1.82

\* Table Base: EQUITY INVESTORS

QS3Q5: Since the start of the coronavirus pandemic, have you purchased options (i.e., contract that allows an investor to buy underlying security instrument at a predetermined price over a certain period of time) or bought on margin (i.e., purchased a stock by borrowing the balance from a bank or broker and using the same security as collateral)?

	Gender		Age					Male Age					Female Age					Region				
	Total (A)	Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
<b>Total</b>	N=515	N=293	N=222	N=136	N=80	N=78	N=85	N=135	N=87	N=55	N=48	N=38	N=66	N=49	N=25	N=30	N=47	N=69	N=102	N=182	N=94	N=136
<b>Total (Unweighted)</b>	N=488	N=252	N=236	N=141	N=86	N=81	N=70	N=110	N=73	N=64	N=48	N=25	N=42	N=68	N=22	N=33	N=45	N=68	N=100	N=174	N=85	N=129
Yes, I have purchased options	23%	26%	19%	34%	47%	21%	18%	2%	31%	56%	24%	17%	0%	39%	28%	16%	19%	4%	24%	25%	21%	22%
Yes, I have bought on margin	10%	11%	10%	17%	16%	9%	3%	5%	20%	15%	4%	6%	2%	13%	18%	16%	1%	8%	6%	13%	7%	12%
Yes, I have both purchased options, and bought on margin	10%	13%	8%	16%	13%	17%	4%	4%	16%	12%	23%	6%	4%	15%	14%	6%	2%	5%	16%	10%	9%	8%
No, I have neither purchased options nor bought on margin	56%	51%	63%	33%	24%	54%	75%	89%	33%	17%	49%	70%	95%	34%	40%	62%						

\* Table Base: EQUITY INVESTORS

Q5Q5: Since the start of the coronavirus pandemic, have you purchased options (i.e., contract that allows an investor to buy underlying security instrument at a predetermined price over a certain period of time) or bought on margin (i.e., purchased a stock by borrowing the balance from a bank or broker and using the same security as collateral)?

	Total (A)	Household Income				Education			Employed		Children in HH		arent of Child Under :		Home Ownership		Marital Status		Race/Ethnicity		
		Less thar \$50K - \$74. \$75K - \$95 \$100K+ (E)	HS or Les	Some Coll	College Grad+ (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowr Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)	Hispanic (U)				
Total	N=515	N=97	N=82	N=84	N=237	N=139	N=148	N=136	N=333	N=182	N=211	N=303	N=196	N=318	N=412	N=101	N=296	N=219	N=322	N=57	N=76
Total (Unweighted)	N=488	N=123	N=111	N=93	N=147	N=115	N=135	N=148	N=325	N=163	N=200	N=288	N=191	N=297	N=382	N=104	N=270	N=218	N=361	N=45	N=41
Yes, I have purchased options	23%	19%	19%	29%	25%	28%	19%	19%	33%	5%	36%	14%	37%	15%	23%	25%	18%	29%	17%	43%	33%
Yes, I have bought on margin	10%	19%	10%	6%	8%	18%	8%	8%	10%	11%	17%	6%	17%	6%	10%	12%	6%	16%	8%	10%	18%
Yes, I have both purchased options, and bought on m	10%	17%	12%	5%	10%	13%	7%	12%	13%	5%	14%	8%	14%	8%	20%	9%	13%	8%	14%	23%	
No, I have neither purchased options nor bought on r	56%	44%	59%	61%	57%	41%	66%	61%	44%	78%	33%	72%	33%	71%	59%	43%	67%	42%	67%	33%	26%

\* Table Base: EQUITY INVESTORS

Q5Q6: In general, do you invest differently in your retirement account than in your brokerage account?

	Total (A)	Gender		Age					Male Age					Female Age					Region			
		Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
Total	N=515	N=293	N=222	N=136	N=80	N=78	N=85	N=135	N=87	N=55	N=48	N=38	N=66	N=49	N=25	N=30	N=47	N=69	N=102	N=182	N=94	N=136
Total (Unweighted)	N=488	N=252	N=236	N=141	N=86	N=81	N=70	N=110	N=73	N=64	N=48	N=25	N=42	N=68	N=22	N=33	N=45	N=68	N=100	N=174	N=85	N=129
Yes (Net)	42%	47%	35%	53%	71%	51%	37%	11%	52%	76%	55%	46%	11%	56%	60%	43%	30%	12%	43%	45%	34%	43%
Yes, I invest more aggressively with my brokerage	25%	31%	17%	30%	45%	32%	20%	6%	32%	58%	31%	28%	8%	28%	16%	34%	14%	4%	22%	27%	18%	29%
Yes, I invest more aggressively with my retirement	17%	16%	18%	23%	26%	19%	16%	5%	20%	18%	25%	18%	3%	28%	44%	9%	16%	8%	21%	18%	15%	14%
No, I do not invest any differently with these account	34%	37%	30%	26%	21%	33%	21%	59%	26%	23%	38%	23%	70%	24%	17%	24%	19%	48%	34%	28%	48%	33%
Not at all sure	9%	6%	11%	12%	2%	5%	14%	7%	12%	1%	1%	14%	3%	13%	3%	12%	14%	11%	8%	13%	5%	6%
N/A - I do not have both types of these accounts	16%	9%	24%	9%	6%	11%	28%	22%	10%	0%	6%	17%	16%	8%	20%	21%	37%	29%	15%	15%	13%	18%

\* Table Base: EQUITY INVESTORS

Q5Q6: In general, do you invest differently in your retirement account than in your brokerage account?

	Total (A)	Household Income				Education			Employed		Children in HH		arent of Child Under :		Home Ownership		Marital Status		Race/Ethnicity		
		Less thar \$50K - \$74. \$75K - \$95 \$100K+ (E)	HS or Les	Some Coll	College Grad+ (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowr Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)	Hispanic (U)				
Total	N=515	N=97	N=82	N=84	N=237	N=139	N=148	N=136	N=333	N=182	N=211	N=303	N=196	N=318	N=412	N=101	N=296	N=219	N=322	N=57	N=76
Total (Unweighted)	N=488	N=123	N=111	N=93	N=147	N=115	N=135	N=148	N=325	N=163	N=200	N=288	N=191	N=297	N=382	N=104	N=270	N=218	N=361	N=45	N=41
Yes (Net)	42%	47%	27%	54%	43%	51%	30%	44%	55%	18%	56%	32%	59%	31%	40%	50%	37%	48%	35%	61%	60%
Yes, I invest more aggressively with my brokerage	25%	24%	11%	25%	31%	26%	16%	25%	34%	8%	26%	12%	38%	17%	27%	17%	23%	27%	21%	39%	26%
Yes, I invest more aggressively with my retirement	17%	23%	16%	28%	12%	25%	14%	19%	21%	10%	20%	15%	21%	15%	13%	32%	14%	21%	14%	22%	34%
No, I do not invest any differently with these account	34%	28%	51%	27%	34%	30%	29%	41%	29%	43%	26%	38%	39%	27%	36%	24%	39%	27%	38%	19%	33%
Not at all sure	9%	3%	8%	11%	10%	7%	10%	5%	9%	8%	5%	11%	5%	11%	8%	11%	7%	10%	7%	13%	6%
N/A - I do not have both types of these accounts	16%	22%	14%	8%	13%	12%	30%	10%	7%	31%	11%	19%	9%	20%	16%	15%	16%	15%	21%	7%	1%

\* Table Base: EQUITY INVESTORS

Q5Q7: In the past month, have you attempted to time your investments to take advantage of perceived market movements?

	Total (A)	Gender		Age					Male Age					Female Age					Region			
		Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
Total	N=515	N=293	N=222	N=136	N=80	N=78	N=85	N=135	N=87	N=55	N=48	N=38	N=66	N=49	N=25	N=30	N=47	N=69	N=102	N=182	N=94	N=136
Total (Unweighted)	N=488	N=252	N=236	N=141	N=86	N=81	N=70	N=110	N=73	N=64	N=48	N=25	N=42	N=68	N=22	N=33	N=45	N=68	N=100	N=174	N=85	N=129
Yes	44%	52%	35%	66%	73%	50%	22%	16%	72%	75%	60%	25%	15%	56%	70%	34%	20%	17%	51%	46%	33%	46%
No	56%	48%	65%	34%	27%	50%	78%	84%	28%	25%	40%	75%	85%	44%	30%	66%	80%	83%	49%	54%	67%	54%

\* Table Base: EQUITY INVESTORS

Q5Q7: In the past month, have you attempted to time your investments to take advantage of perceived market movements?

	Total (A)	Household Income				Education			Employed		Children in HH		arent of Child Under :		Home Ownership		Marital Status		Race/Ethnicity		
		Less thar \$50K - \$74. \$75K - \$95 \$100K+ (E)	HS or Les	Some Coll	College Grad+ (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowr Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)	Hispanic (U)				
Total	N=515	N=97	N=82	N=84	N=237	N=139	N=148	N=136	N=333	N=182	N=211	N=303	N=196	N=318	N=412	N=101	N=296	N=219	N=322	N=57	N=76
Total (Unweighted)	N=488	N=123	N=111	N=93	N=147	N=115	N=135	N=148	N=325	N=163	N=200	N=288	N=191	N=297	N=382	N=104	N=270	N=218	N=361	N=45	N=41
Yes	44%	46%	38%	36%	51%	48%	39%	47%	55%	25%	63%	31%	63%	33%	41%	57%	37%	54%	38%	56%	58%
No	56%	54%	62%	64%	49%	52%	61%	53%	45%	75%	37%	69%	37%	67%	59%	43%	63%	46%	62%	44%	42%

\* Table Base: EQUITY INVESTORS

Q5Q8: About how many times in the past month have you attempted to time your investments to take advantage of perceived market movements?

	Total (A)	Gender		Age					Male Age					Female Age					Region			
		Male (B)	Female (C)	18-34 (D)	35-44 (E)	45-54 (F)	55-64 (G)	65+ (H)	18-34 (I)	35-44 (J)	45-54 (K)	55-64 (L)	65+ (M)	18-34 (N)	35-44 (O)	45-54 (P)	55-64 (Q)	65+ (R)	Northeast (S)	South (T)	Midwest (U)	West (V)
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1	14%	9%	23%	5%	13%	17%	13%	47%	2%	19%	10%	0%	16%	11%	0%	37%	26%	73%	4%	13%	17%	21%
2	22%	21%	23%	19%	22%	22%	32%	23%	21%	15%	27%	8%	35%	13%	38%	8%	54%	13%	13%	23%	17%	29%
3	24%	26%	20%	25%	25%	34%	13%	8%	27%	17%	43%	26%	9%	22%	43%	7%	0%	7%	28%	21%	26%	22%
4	11%	13%	13%	13%	9%	6%	37%	0%	9%	7%	58%	0%	23%	11%	0%	16%	0%	22%	9%	6%	7%	9%
5	11%	13%	8%	13%	13%	13%	0%	6%	15%	18%	4%	0%	13%	9%	0%	39%	0%	0%	5%	18%	12%	8%
6-10	11%	11%	11%	15%	10%	3%	4%	16%	12%	11%	4%	8%	26%	22%	8%	0%	0%	8%	20%	5%	16%	9%
More than 10	7%	9%	2%	9%	8%	6%	2%	0%	13%	12%	5%	0%	0%	0%	0%	9%	4%	0%	7%	10%	5%	3%
Mean	4.53	5.11	3.37	5.46	4.71	3.89	3.19	2.45	5.94	5.46	3.80	3.81	3.37	4.34	2.96	4.11	2.60	1.66	5.32	5.14	4.00	3.31
Median	3.00	3.00	3.00	4.00	3.00	3.00	3.00	2.00	3.00	3.00	3.00	4.00	2.00	4.00	3.00	3.00	2.00	1.00	4.00	3.00	3.00	2.00
Standard Deviation	4.72	5.35	2.79	5.23	4.94	4.60	2.37	1.92	5.95	5.72	4.73	1.20	2.05	2.80	1.11	4.44	3.08	1.47	4.98	5.88	3.13	2.81

\* Table Base: HAVE ATTEMPTED TO TIME INVESTMENT TO TAKE ADVANTAGE OF PERCEIVED MARKET MOVEMENTS

QS2Q8: About how many times in the past month have you attempted to time your investments to take advantage of perceived market movements?

	Total (A)	Household Income				Education			Employed		Children in HH		Parent of Child Under 18		Home Ownership		Marital Status		Race/Ethnicity		
		Less than \$50K	\$50K - \$74.9K	\$75K - \$99.9K	\$100K+	HS or Less	Some Coll	College Grad+	H (H)	Yes (I)	No (J)	Yes (K)	No (L)	Yes (M)	No (N)	Homeowner	Renter (P)	Married (Q)	Not married (R)	White (S)	AA (T)
Total	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
1	14%	7%	13%	17%	16%	11%	12%	9%	11%	27%	9%	21%	9%	19%	17%	4%	17%	11%	12%	6%	16%
2	22%	29%	17%	18%	20%	21%	22%	21%	20%	30%	21%	23%	22%	21%	22%	20%	20%	23%	28%	9%	16%
3	24%	26%	19%	25%	24%	32%	26%	19%	26%	15%	28%	19%	27%	20%	24%	25%	23%	25%	20%	37%	34%
4	11%	8%	19%	9%	11%	9%	13%	12%	13%	4%	14%	8%	13%	9%	10%	14%	10%	12%	11%	21%	10%
5	11%	16%	18%	5%	10%	13%	13%	11%	11%	12%	10%	13%	8%	15%	10%	15%	9%	14%	8%	12%	18%
6-10	11%	12%	12%	14%	10%	11%	7%	16%	12%	8%	11%	11%	11%	11%	11%	13%	12%	10%	13%	11%	0%
More than 10	7%	3%	1%	11%	9%	4%	7%	12%	7%	5%	8%	5%	9%	4%	6%	10%	10%	4%	7%	4%	6%
Mean	4.53	4.06	3.86	4.98	4.77	4.09	4.70	5.51	4.73	3.73	4.91	4.00	4.98	4.00	4.22	5.42	4.87	4.20	4.51	4.24	4.20
Median	3.00	3.00	4.00	3.00	3.00	3.00	3.00	4.00	3.00	2.00	3.00	3.00	3.00	3.00	3.00	4.00	3.00	3.00	3.00	3.00	3.00
Standard Deviation	4.72	3.41	3.04	5.02	5.38	3.86	5.34	5.28	4.70	4.74	4.98	4.30	5.16	4.10	4.52	5.20	5.34	4.04	4.67	3.46	4.87

\* Table Base: HAVE ATTEMPTED TO TIME INVESTMENT TO TAKE ADVANTAGE OF PERCEIVED MARKET MOVEMENTS