

Executive Dashboards - Financial CLOUT - Trade Area

An overview of current-year and five-year projections of market penetration and dollar balances for a number of financial products including all basic banking products and services, such as checking accounts, investments, credit cards, lines of credit and savings products.

Financial CLOUT 2021 | Asset Product Overview

ENVIRONICS ANALYTICS

Trade Area: San Diego

The Trade Area used in the analysis.

CHECKING ACCOUNT



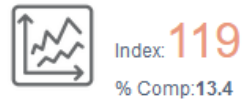
Checking Account(s)

SAVINGS ACCOUNT



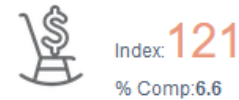
Other Type of Savings/Money Mkt Account(s)

STOCK TRADES



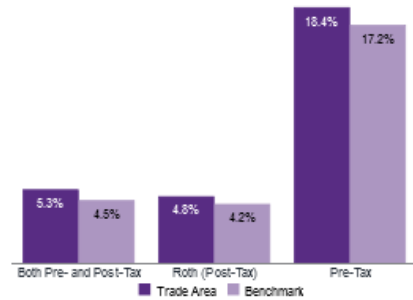
Times bought/sold thru broker - 1-4 times

RETIREMENT ACCOUNTS



Roth IRA Split Investments (Stocks/Bonds /Interest-Earning Assets)

PENSION/RETIREMENT CONTRIBUTION



INVESTMENT PRODUCTS

	Count	%	Base Count	Base %	Index
Investment					
Publicly-Traded Stock of Current/Former Employer	54,349	10.47	11,036,130	8.78	119
Publicly-Traded Stocks of Other Company	92,018	17.73	18,838,351	14.98	118
Real Estate	112,553	21.69	23,350,240	18.57	117
Publicly-Traded Stocks	148,143	28.55	30,599,003	24.34	117
Brokerage Account(s)	169,829	32.69	36,247,121	28.83	113
Corporate or Municipal Bonds	39,689	7.65	8,598,299	6.84	112
Mutual Funds and ETFs	123,555	23.81	27,391,130	21.79	109
Government Bonds or Treasury Bills	40,959	7.89	9,300,836	7.40	107
Tax-Deferred Savings Plan (Coverdell/529/Education Plan)	44,215	8.52	10,463,330	8.31	102
Government Savings Bonds	65,771	12.68	16,158,558	12.85	99

For example, **13.4%** of households in the Trade Area of San Diego, buys or sells stocks through a broker between 1 to 4 times in the last 90 days. With an Index value of **119**, this is 19% higher than average when compared to all of the United States.

Benchmark: United States

Chosen from Index ranking with a minimum 5% composition
Used 90 day profiles to provide most current view of the market

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The Benchmark selected for analysis.



Count: The number of people or households in the Trade Area who have that financial product or service.
%: (Count / Total Count * 100) The percentage of the population or households in the Trade Area who have that financial product or service.
Base Count: The number of people or households in the benchmark who have that financial product or service.
Base %: (Base Count / Base Total Count * 100) The percentage of the population or households in the benchmark who have that financial product or service.
Index: (% / Base % * 100) Measures if the population or households in the Trade Area are more or less likely to have that financial product or service when compared to the benchmark (average = 100).