

## Executive Dashboard - Financial - WealthTrends (Target Group)

Provides key measures to evaluate the economic and financial wellbeing of households in a specified Target Group for a time series analysis. Data visualizations are also provided to better illustrate key economic and financial trends for Savings, Investments, Real Estate values and Consumer Debt.

### WealthTrends | Quarterly Growth Rates



**Target Group:** Suburban Middle-Class Families (11, 19, 21, 25, 38, 45) — The Target Group used for this report.

**Total Households\*:** 8,384

#### AVERAGE VALUES AND GROWTH RATES PER HOUSEHOLD

	2020 Q4	2021 Q1	% Growth: Q4 to Q1
<b>WealthScapes Totals</b>			
WealthTrends Net Worth - Value	\$225,700	\$255,450	5.9
WealthTrends Assets - Value			4.1
WealthTrends Debt - Balance			1.3
<b>Assets - Savings</b>			
Total Savings - Balance			0.0
Chequing & Savings Accounts - Balance	\$51,455	\$52,259	1.6
GICs and Term Deposits - Balance	\$28,280	\$27,477	-2.8
<b>Assets - Investments</b>			
Total Investments - Balance	\$121,014	\$124,310	2.7
Stocks - Balance	\$28,305	\$28,475	0.6
Bonds - Balance	\$5,396	\$5,161	-4.3
Investment Funds - Balance	\$87,314	\$90,674	3.8
<b>Assets - Unlisted Shares</b>			
Unlisted Shares - Balance			
<b>Assets - Real Estate</b>			
Total Real Estate - Value			
Primary Real Estate - Value			
Other Real Estate - Value			
Net Real Estate Equity - Value			
<b>Debt</b>			
Mortgage - Balance	\$73,153	\$72,123	-1.4
Total Consumer Debt - Balance	\$34,651	\$34,283	-1.1
Credit Card Debt - Balance	\$7,675	\$7,220	-5.9
Personal Loans - Balance			
Lines of Credit - Balance			

The Total Household count in the Trade Area for 2020 Q4.  
**Note:** Total households are not projected per quarter.  
 The value listed here is used throughout all reported quarterly data.

The average balance for total investments for households in the **Young Urban Core** Target Group in the benchmark (benchmark is listed in the Reports Details page) in the last quarter of 2020 (2020 Q4) was **\$269,650**. These households saw an increase of **3.9%** in their total investment balance in the first quarter of 2021 (2021 Q1) with a value of **\$280,219**.

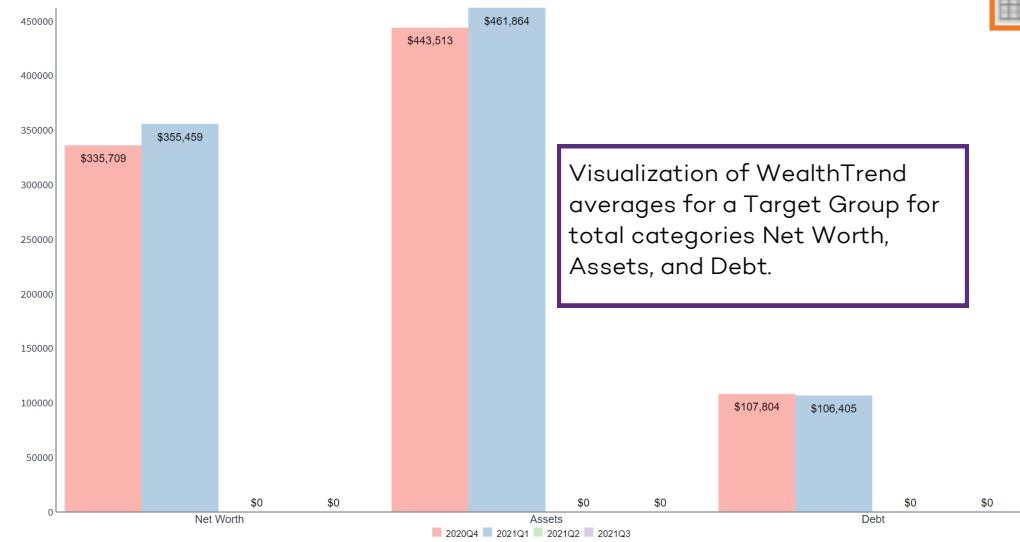
**Quarter (e.g. 2020 Q4):** The value or balance in dollars per household in the Target Group for the variable during a quarterly period.  
**% Growth (e.g. % Growth Q4 to Q1):** Provides a measure for comparing values between quarters, while also describing economic and financial growth patterns for households in the Target Group.  
**Note:** Users have the ability to view tabular format and download the raw data for the tables.

% Growth Legend: < 0% > 0%

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WEALTHTRENDS AVERAGES PER HOUSEHOLD

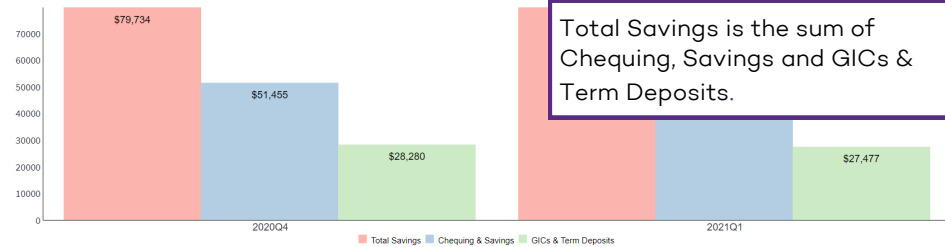


Visualization of WealthTrend averages for a Target Group for total categories Net Worth, Assets, and Debt.



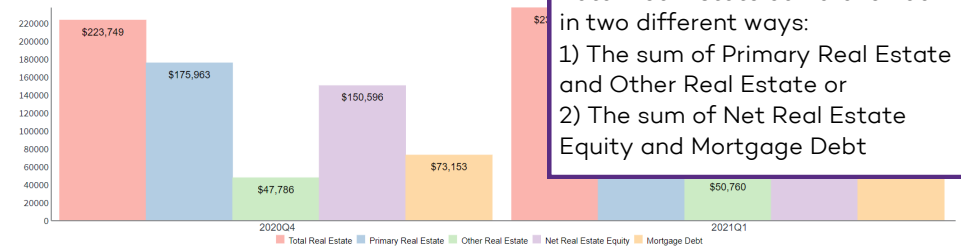
**Note:** Change to tabular format by scrolling over the graph and clicking the spreadsheet icon in the top right corner. Once in tabular format, download the data by scrolling over the table and clicking the Excel icon, , that appears in the top right corner of the table. Return to the graph by clicking on the spreadsheet icon.

SAVINGS PER HOUSEHOLD



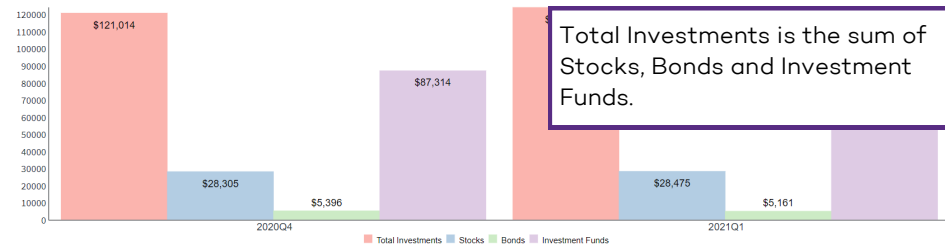
Total Savings is the sum of Chequing, Savings and GICs & Term Deposits.

REAL ESTATE VALUES PER HOUSEHOLD



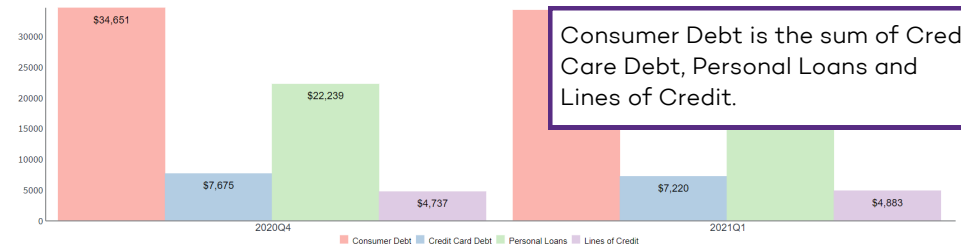
Total Real Estate can be broken down in two different ways:  
 1) The sum of Primary Real Estate and Other Real Estate or  
 2) The sum of Net Real Estate Equity and Mortgage Debt

INVESTMENTS PER HOUSEHOLD



Total Investments is the sum of Stocks, Bonds and Investment Funds.

CONSUMER DEBT PER HOUSEHOLD



Consumer Debt is the sum of Credit Card Debt, Personal Loans and Lines of Credit.