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Rep. Michael E. Capuano (D-MA)

House · Democrat (most recent term) · MA-7 · in Congress 1999–2019 ·
Bioguide ID C001037

Party history: D 1999–2019. Source: term data in unitedstates/congress-legislators (CC0);
party shown is as recorded per term there.

Estimated net worth (from public disclosures)

Estimate	Report year	Low	Mid	High
(a) Estimated net worth at the earliest available report (2013); the member entered office earlier, in 1999	2013	\$572,040	\$1,744,518	\$2,916,997
(b) Latest net worth estimate	2017	\$1,346,046	\$2,781,522	\$4,216,998
(c) Estimated gain / loss, nominal dollars, 2013 → 2017 (4 years spanned)	2013– 2017	– \$1,570,951	+ \$1,037,004	+ \$3,644,958

Gain Low = latest Low – earliest High; Gain High = latest High – earliest Low (widest possible spread); Mid = latest Mid – earliest Mid.

Reliability flags (net worth): none for these two endpoints. **Included in the recommended dollar-gain ranking.**

Net worth by report year (mid; Low–High)

Report year	Assets (mid)	Liabilities (mid)	Net worth mid	Low ... High	Status / flags
2013	\$2,327,020	\$582,502	\$1,744,518	\$572,040 ... \$2,916,997	computed
2014	\$2,808,020	\$440,002	\$2,368,019	\$1,079,041 ... \$3,656,997	computed
2015	\$3,021,522	\$440,002	\$2,581,520	\$1,212,044 ... \$3,950,997	computed
2016	\$3,144,022	\$440,002	\$2,704,020	\$1,282,044 ... \$4,125,997	computed
2017	\$3,201,523	\$420,001	\$2,781,522	\$1,346,046 ... \$4,216,998	computed

- **What this is:** Net worth = Schedule A assets (each value range at its midpoint; low–high range shown) minus Schedule D liabilities (midpoints / ranges). **Low** = assets at range floors minus liabilities at range

ceilings; **Mid** = midpoints; **High** = assets at ceilings minus liabilities at floors. Low and High are outer bounds of the reported ranges, not likely outcomes.

- **What it excludes / understates:** exact values (only ranges are reported); a **personal residence is not reported as an asset** (although a mortgage on it may be listed as a liability, which then lowers the estimate); retirement and federal accounts (e.g. Thrift Savings Plan, defined-benefit pensions) are only partly or not reported; assets of excepted/blind trusts, cash held below reporting thresholds, vehicles, household goods and most spouse/dependent items exempt from reporting are not included; liabilities on a personal residence, revolving credit under thresholds and loans to family may be omitted by filers.
- **Open-ended top ranges** (e.g. "Over \$50,000,000") are counted at their **lower bound** and flagged, so such values are understated.
- The change is a change in **estimated net worth in nominal dollars** (no inflation adjustment). It includes salary, gifts, inheritances, business income and re-valuation as well as investment results, and it is subject to range-bracket noise; it is **not** an investment return and implies nothing about conduct.

Read this first. Members report asset values only as *ranges* (e.g. "\$15,001 – \$50,000"), never exact dollars. Every figure below is an **estimate** computed from range midpoints, not a measured return. Figures cannot be interpreted as investment performance, and they do not show wrongdoing or skill. Methodology and limitations are at the end and in the project README. Sources: public financial disclosure reports filed with the Clerk of the U.S. House of Representatives and/or the Secretary of the Senate (Senate eFD), linked below.

AVG. ANNUAL
CHANGE
(GEOMETRIC, EST.)

+6.2%

SIMPLE AVERAGE OF
YEARS

+6.7%

YEARS ESTIMATED

4

BEST / WORST
SINGLE YEAR

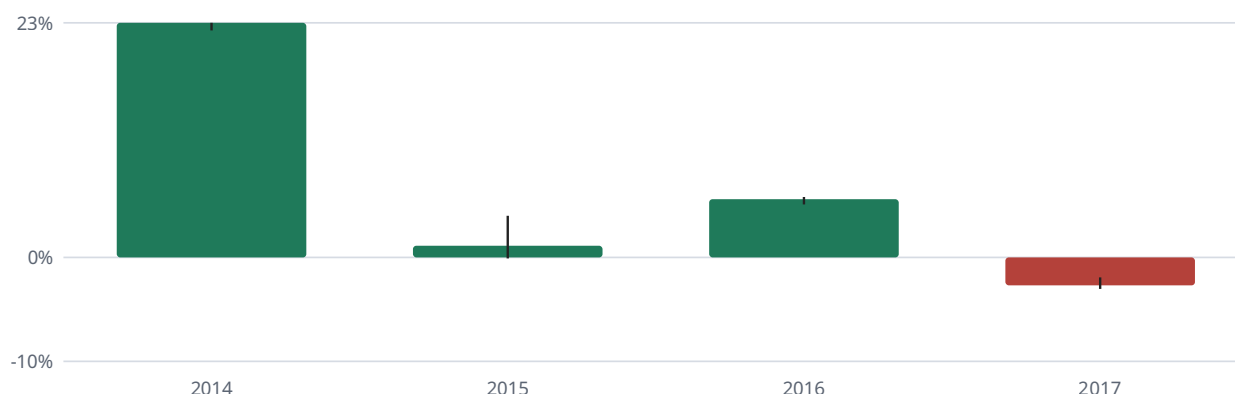
2014 +23%

2017 -3%

Reliability flags: few years (4).

Sensitivity band for the average (all ranges at floor vs. all at ceiling, same holdings both years): +7.4% to +5.7%. This band is narrow because it moves both years together; the true uncertainty is larger — see the per-year "strict envelope" column and the limitations.

Estimated year-over-year change



Bars: midpoint estimate; whisker: same-position floor/ceiling band. Axis clipped to -100%...+150%. Years with insufficient traceable holdings are omitted.

Year (t-1 → t)	Opening value (mid)	Closing value (mid)	Income (mid)	Buys (mid)	Sales (mid)	Est. gain	Same-position band	Strict envelope	Traced coverage	Status / flags
2013→2014	\$2,294,520	\$2,767,520	\$53,004	\$8,000	\$0	+22.6%	+21.8% ... +24.3%	-68% ... +113%	99%	counted
2014→2015	\$2,742,018	\$2,883,019	\$53,004	\$203,507	\$40,501	+1.1%	-0.1% ... +4.0%	-87% ... +89%	98%	counted
2015→2016	\$3,021,522	\$3,144,022	\$46,754	\$383,008	\$383,008	+5.6%	+5.1% ... +5.8%	-91% ... +102%	100%	counted; many new/exited positions
2016→2017	\$3,136,022	\$3,031,020	\$53,004	\$32,500	\$0	-2.7%	-3.0% ... -1.9%	-82% ... +77%	100%	counted

Filings used

Each annual-report year uses one filing (most recently filed version among originals/amendments whose Schedule A row count is ≥ 40% of the largest). Electronic (text) PDFs are parsed. Scanned/image-only filings are OCR-read and used **only** if they pass the explicit validation gates described in the project README (value/income coverage, two-engine agreement, exact bracket snapping, page completeness, year-to-year position continuity); such years are labelled **OCR-derived** below. Scanned filings that fail validation are listed as “insufficient data – scanned”.

Report year	Doc ID	Type	Filed	Schedule A rows	Rows with unparsed value	Source (official filing) / SHA-256
2013	10000969	House annual	5/5/2014	40	0	10000969.pdf 0757c229bf9fc5c4ee1b414d18704396cd5473d5e005a67cc1025f969912b68f
2014	10005668	House annual	5/9/2015	41	0	10005668.pdf 28c3a8030ef1f0b71aad2abaf09458d3352cb779265e812db37425eb002a3a8b
2015	10010160	House annual	5/8/2016	46	0	10010160.pdf 032fc317246b0622aa5b61e642b4d1b308865750c678073d8c42ebc89d8651e8

2016	10015045	House annual	5/15/2017	58	0	10015045.pdf 8442c4c92bdd575d8ff25eb8232c7 161c21c062b6eccf7023ad7b0301 c f f e c 8 2
2017	10021676	House annual	5/14/2018	50	0	10021676.pdf 75bc3e49f8b99a3a8d1827fd20065 b51c5cb6d24e5361e9b55ad4ea005 ee64e2

Largest movers 2014→2015

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
CT&M, LLC	SP	held	\$100,001 - \$250,000	\$250,001 - \$500,000	\$0	\$0
Charles Schwab 401K ⇒ Schwab Health Care Fund	SP	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$83,001	\$0
Nesteggs - IRA Rollover ⇒ Windward Aggressive Fund	SP	held	\$50,001 - \$100,000	None	\$0	\$0
Fidelity - IRA Rollover ⇒ Royce Total Return FD Investment CL	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$8,000	\$0
Charles Schwab 401K ⇒ Cash & MM Fund	SP	exited	\$1,001 - \$15,000	—	\$0	\$32,500
Fidelity - IRA Rollover ⇒ Fidelity GNMA Fund	SP	new	—	\$15,001 - \$50,000	\$16,001	\$0
Fidelity - IRA Rollover ⇒ Select Nat'l Gas	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$8,000
Charles Schwab 401K ⇒ Principal Mid Cap Blend A	SP	held	\$15,001 - \$50,000	\$15,001 - \$50,000	\$16,001	\$0

Largest movers 2015→2016

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Charles Schwab 401K ⇒ First Eagle Fund of America	SP	held	\$1,001 - \$15,000	None	\$0	\$40,501
Charles Schwab 401K ⇒ Schwab Total Stock Market Fund	SP	held	\$1,001 - \$15,000	None	\$0	\$32,500

Fidelity - IRA Rollover ⇒ Invesco Growth & Income Fund	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
Charles Schwab 401K ⇒ Schwab Cash & MM Fund	SP	held	\$1,001 - \$15,000	None	\$0	\$32,500
Fidelity - IRA Rollover ⇒ Pax World Small Cap Class A	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
TD Ameritrade 401K ⇒ First Eagle Fund of America	SP	new	—	\$15,001 - \$50,000	\$40,501	\$0
Fidelity - IRA Rollover ⇒ Royce Total Return FD Investment CL	SP	held	\$1,001 - \$15,000	\$1,001 - \$15,000	\$0	\$0
TD Ameritrade 401K ⇒ Harding Loevner Intl Sm	SP	new	—	\$1,001 - \$15,000	\$8,000	\$0

Largest movers 2016→2017

Position (as written in filing)	Owner	Kind	Opening range(s)	Closing range(s)	Buys (mid)	Sales (mid)
Fidelity - IRA Rollover ⇒ Pax World Small Cap Class A [MF]	SP	held	\$15,001 - \$50,000	None	\$0	\$0
Fidelity - IRA Rollover ⇒ Fidelity Cash Reserves [MF]	SP	held	\$15,001 - \$50,000	\$1 - \$1,000	\$0	\$0
Fidelity - IRA Rollover ⇒ Family Value [MF]	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0
Nationwide Retirement ⇒ NW Lg Cap Growth [MF]	—	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
TD Ameritrade 401K ⇒ Baron Small Cap [MF]	SP	held	\$1,001 - \$15,000	\$15,001 - \$50,000	\$0	\$0
TD Ameritrade 401K ⇒ First Eagle Fund of America [MF]	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0
Fidelity - IRA Rollover ⇒ Export & Multinational [MF]	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0
TD Ameritrade 401K ⇒ Insured Deposit Acct (IDA) [MF]	SP	held	\$15,001 - \$50,000	\$1,001 - \$15,000	\$0	\$0

Method (summary)

1. Schedule A asset rows are read from each annual report; the dollar range for each row is converted to its midpoint. Open-ended top ranges ("Over \$50,000,000") are excluded from the traced set and counted as a coverage loss.

2. Positions are matched year to year by owner code (self/SP/DC/JT) + normalised asset name. A position that appears only in year t is included only if Schedule B shows a purchase of it in year t (opening value 0); a position that disappears is included only if Schedule B shows a sale (closing value 0). Otherwise it is excluded as unexplained.
3. Estimated gain = (closing – opening + reported income – purchases + sale proceeds) ÷ opening, all at midpoints, for the traced positions. “Capital gains” income is not added again (it is already in value change and sale proceeds).
4. A year counts only if traced opening value ≥ \$50,000 and traced coverage ≥ 60% of the opening midpoint. A member is ranked only with ≥ 3 such years (exactly 2 = “limited data”, shown but unranked). Average = geometric mean of (1+yearly estimate).

Limitations

- Ranges are wide (up to a factor of 5 or more, and up to \$50M+ open-ended); a holding can move between ranges without any real change in value, and stay in a range while moving materially. Yearly estimates are therefore noisy; the “strict envelope” shows the mathematical worst/best case and is typically wider than ±100%.
- Purchases and sales are only disclosed as ranges and only for transactions over \$1,000; partial sales, dividend reinvestment, spousal/dependent accounts and retirement-plan funds are reported inconsistently. Excepted/ blind trusts, personal residences and certain pensions are not reported at all.
- Filers sometimes change how they list assets (e.g. listing a brokerage account vs. its individual holdings), which can make positions untraceable across years; these are excluded rather than guessed.
- Asset values in an annual report are as of Dec 31 of the reporting year; the report year t–1→t covers that calendar year. Late or amended filings are used when filed; extensions can delay them.
- The text of these reports is machine-parsed from PDFs; parse errors are possible. Every number links back to the cited filing. This is not investment advice.
- Use of these filings is restricted by 5 U.S.C. § 105(c) (no unlawful, commercial or credit-rating purpose, and none for solicitation of money).

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Figures are estimates derived from value ranges reported in public financial disclosures; they are not exact values and are not financial advice.