



Filing ID #20025678

PERIODIC TRANSACTION REPORT

Clerk of the House of Representatives • Legislative Resource Center • B81 Cannon Building • Washington, DC 20515

FILER INFORMATION

Name: Hon. Josh Gottheimer**Status:** Member**State/District:** NJ05

TRANSACTIONS

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		3M Company Common Stock (MMM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/26/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Abbott Laboratories Common Stock (ABT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/29/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Advanced Micro Devices, Inc. (AMD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Advanced Micro Devices, Inc. (AMD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/31/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Airbnb, Inc. - Class A Common Stock (ABNB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	07/09/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		ALLIANZ SE UNSP/ADR (ALIZY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/09/2024	08/12/2024	\$1,001 - \$15,000	☒

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JT		Alphabet Inc. - Class C Capital Stock (GOOG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/01/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Ambev S.A. American Depositary Shares (ABEV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Ambev S.A. American Depositary Shares (ABEV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/31/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Amphenol Corporation Common Stock (APH) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		Arista Networks, Inc. Common Stock (ANET) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/29/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		AtriCure, Inc. - Common Stock (ATRC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		AutoZone, Inc. Common Stock (AZO) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		Block, Inc. Class A Common Stock, (SQ) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	07/24/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Block, Inc. Class A Common Stock, (SQ) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐

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JT	D.R. Horton, Inc. Common Stock (DHI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/31/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	D.R. Horton, Inc. Common Stock (DHI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	DBS GROUP HLDGS LTD S/ADR (DBSDY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/08/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	Eli Lilly and Company Common Stock (LLY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	Flywire Corporation - Voting Common Stock (FLYW) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Freeport-McMoRan, Inc. Common Stock (FCX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Genmab A/S - American Depositary Shares (GMAB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Heartland Express, Inc. - Common Stock (HTLD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	07/26/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Helen of Troy Limited - Common Stock (HELE) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	07/12/2024	08/12/2024	\$1,001 - \$15,000	☐

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JT		HubSpot, Inc. Common Stock (HUBS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		Intuit Inc. - Common Stock (INTU) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		Intuitive Surgical, Inc. - Common Stock (ISRG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/22/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		La-Z-Boy Incorporated Common Stock (LZB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/16/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Marriott International - Class A Common Stock (MAR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/09/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		Mastercard Incorporated Common Stock (MA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Mastercard Incorporated Common Stock (MA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/18/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Mastercard Incorporated Common Stock (MA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/31/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		McDonald's Corporation Common Stock (MCD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/09/2024	08/12/2024	\$1,001 - \$15,000	☐

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	McKesson Corporation Common Stock (MCK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	Medpace Holdings, Inc. - Common Stock (MEDP) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/26/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	Meta Platforms, Inc. - Class A Common Stock (META) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	Netflix, Inc. - Common Stock (NFLX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	Northrop Grumman Corporation Common Stock (NOC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Pacific Premier Bancorp Inc - Common Stock (PPBI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Paragon 28, Inc. Common Stock (FNA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
SP	PT Telekomunikasi Indonesia, Tbk (TLK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Roth IRA Spouse	P	07/31/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	PT Telekomunikasi Indonesia, Tbk (TLK) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐

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JT	Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	ROCHE HOLDING LTD S/ADR (RHHBY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/23/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Salesforce, Inc. Common Stock (CRM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	07/22/2024	08/12/2024	\$1,001 - \$15,000	☒
JT	Schneider National, Inc. Common Stock (SNDR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/26/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Shell PLC American Depositary Shares (SHEL) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/05/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Shionogi & Co Ltd Unsponsored ADR (SGIOY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Shoals Technologies Group, Inc. - Class A Common Stock (SHLS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐
JT	Sony Group Corporation American Depositary Shares (SONY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/20/2024	\$1,001 - \$15,000	☐
JT	SpringWorks Therapeutics, Inc. - common stock (SWTX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐

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JT		Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/05/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		Tesla, Inc. - Common Stock (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Tesla, Inc. - Common Stock (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/29/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Tesla, Inc. - Common Stock (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/24/2024	08/12/2024	\$1,001 - \$15,000	☐
JT		Trane Technologies plc (TT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	07/01/2024	08/12/2024	\$1,001 - \$15,000	☒
JT		Viavi Solutions Inc. - Common Stock (VIAV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	07/19/2024	08/12/2024	\$1,001 - \$15,000	☐

* For the complete list of asset type abbreviations, please visit <https://fd.house.gov/reference/asset-type-codes.aspx>.

INVESTMENT VEHICLE DETAILS

- Morgan Stanley - Roth IRA Spouse (Owner: SP)
- Morgan Stanley - Select UMA Account # 1 (Owner: JT)
LOCATION: US

INITIAL PUBLIC OFFERINGS

☐ Yes ☒ No

CERTIFICATION AND SIGNATURE

☒ I CERTIFY that the statements I have made on the attached Periodic Transaction Report are true, complete, and correct to the best of

my knowledge and belief. Further, I CERTIFY that I have disclosed all transactions as required by the STOCK Act.

Digitally Signed: Hon. Josh Gottheimer , 08/15/2024