



PERIODIC TRANSACTION REPORT

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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	AbbVie Inc. (ABBV) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Adobe Inc. (ADBE) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/10/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Adobe Inc. (ADBE) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Advanced Micro Devices, Inc. (AMD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Airbnb, Inc. - Class A (ABNB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/08/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Alphabet Inc. - Class C Capital Stock (GOOG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Amgen Inc. (AMGN) [ST]	S	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Apple Inc. (AAPL) [ST]	P	05/16/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Blackstone Inc. (BX) [ST]	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Broadcom Inc. (AVGO) [ST]	P	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Capital One Financial Corporation (COF) [ST]	S	05/02/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Charles Schwab Corporation (SCHW) [ST]	S (partial)	05/08/2023	06/07/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Cheniere Energy, Inc. (LNG) [ST]	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	ConocoPhillips (COP) [ST]	S (partial)	05/23/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Deere & Company (DE) [ST]	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Deere & Company (DE) [ST]	S (partial)	05/05/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Eli Lilly and Company (LLY) [ST]	P	05/03/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Eli Lilly and Company (LLY) [ST]	P	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Eli Lilly and Company (LLY) [ST]	P	05/05/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Eli Lilly and Company (LLY) [ST]	P	05/09/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Etsy, Inc. (ETSY) [ST]	S	05/08/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Exact Sciences Corporation (EXAS) [ST]	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	First Solar, Inc. (FSLR) [ST]	P	05/12/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Freeport-McMoRan, Inc. (FCX) [ST]	S (partial)	05/03/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Intuitive Surgical, Inc. (ISRG) [ST]	S (partial)	05/30/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Intuitive Surgical, Inc. (ISRG) [ST]	P	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Manulife Financial Corporation	P	05/15/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		(MFC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					<input type="checkbox"/>
JT	Mastercard Incorporated (MA)	[ST]	P	05/11/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	McKesson Corporation (MCK)	[ST]	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Microsoft Corporation (MSFT)	[ST]	P	05/30/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Microsoft Corporation (MSFT)	[OP]	P	05/16/2023	06/06/2023	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$160; Expires 01/19/2024					
JT	Microsoft Corporation (MSFT)	[OP]	P	05/15/2023	06/06/2023	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$155; Expires 01/19/2024					
JT	Microsoft Corporation (MSFT)	[OP]	P	05/15/2023	06/06/2023	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$160; Expires 09/15/2023					
JT	Microsoft Corporation (MSFT)	[OP]	P	05/15/2023	06/06/2023	\$500,001 - \$1,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$165; Expires 08/18/2023					
JT	Microsoft Corporation (MSFT)	[OP]	S	05/16/2023	06/06/2023	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account					

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		DESCRIPTION: Call options; Strike price \$160; Expires 03/15/2024					
JT	Microsoft Corporation (MSFT) [OP]	S		05/15/2023	06/06/2023	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$165; Expires 01/19/2024					
JT	Microsoft Corporation (MSFT) [OP]	S		05/15/2023	06/06/2023	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$160; Expires 01/19/2024					
JT	Microsoft Corporation (MSFT) [OP]	S		05/15/2023	06/06/2023	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$160; Expires 06/21/2024					
JT	MongoDB, Inc. - Class A (MDB) [ST]	S (partial)		05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Morgan Stanley (MS) [ST]	S (partial)		05/05/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	NVIDIA Corporation (NVDA) [ST]	P		05/09/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	NVIDIA Corporation (NVDA) [ST]	P		05/08/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	NVIDIA Corporation (NVDA) [ST]	P		05/04/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Oracle Corporation (ORCL) [ST]	S (partial)		05/19/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New					

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	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Oracle Corporation (ORCL) [ST]	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	PayPal Holdings, Inc. (PYPL) [ST]	S	05/12/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Progressive Corporation (PGR) [ST]	S (partial)	05/17/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Roche Holdings AG Basel American Depository Shares (RHHBY) [ST]	S (partial)	05/16/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Seagen Inc. (SGEN) [ST]	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Sherwin-Williams Company (SHW) [ST]	S (partial)	05/12/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Shopify Inc. Class A Subordinate Voting Shares (SHOP) [ST]	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Starbucks Corporation (SBUX) [ST]	P	05/08/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Tapestry, Inc. (TPR) [ST]	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Tencent Holdings Limited	S (partial)	05/15/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>

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	Un-sponsored ADR Representing B Shares (TCEHY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					<input type="checkbox"/>
JT	Tencent Holdings Limited Un-sponsored ADR Representing B Shares (TCEHY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/16/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Tesla, Inc. (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Texas Instruments Incorporated (TXN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	The Trade Desk, Inc. - Class A (TTD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/01/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Trane Technologies plc (TT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Transdigm Group Incorporated (TDG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	05/16/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	U.S. Physical Therapy, Inc. (USPH) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	05/24/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Uber Technologies, Inc. (UBER) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	05/19/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>
JT	United Parcel Service, Inc. (UPS) [ST]	S (partial)	05/03/2023	06/06/2023	\$1,001 - \$15,000	<input type="checkbox"/>

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		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		United Parcel Service, Inc. (UPS) [ST]	S (partial)	05/12/2023	06/06/2023	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

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

ASSET CLASS DETAILS

- o Morgan Stanley - Portfolio Management Active Assets Account (Owner: JT)
LOCATION: US
- o 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 , 06/11/2023