



# 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	Adobe Inc. - Common Stock (ADBE) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/15/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Adobe Inc. - Common Stock (ADBE) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Advanced Micro Devices, Inc. (AMD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/18/2024	04/04/2024	\$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	P	03/15/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Agree Realty Corporation Common Stock (ADC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/22/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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JT	Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/15/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	BHP Group Limited American Depository Shares (BHP) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/12/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	BioNTech SE - American Depository Shares (BNTX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Block, Inc. Class A Common Stock, (SQ) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/21/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	CBIZ, Inc. Common Stock (CBZ) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/07/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	D.R. Horton, Inc. Common Stock (DHI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	D.R. Horton, Inc. Common Stock (DHI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/07/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	DASSAULT SYSTEMES SA ADR (DASTY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Eaton Corporation, PLC Ordinary Shares (ETN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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JT	EEN ENERGY HLDGS UNSP/ADR (XNGSY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/26/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Endava plc American Depositary Shares (DAVA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Fox Factory Holding Corp. - Common Stock (FOXF) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	HAIER SMART HOME U/ADR (HSHCY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	HCA Healthcare, Inc. Common Stock (HCA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/01/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Intapp, Inc. - Common Stock (INTA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Marriott International - Class A Common Stock (MAR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	MercadoLibre, Inc. - Common Stock (MELI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/15/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	MercadoLibre, Inc. - Common Stock (MELI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/12/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>

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JT	OceanFirst Financial Corp. - Common Stock (OCFC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Perella Weinberg Partners - Class A Common Stock (PWP) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	03/07/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Salesforce, Inc. Common Stock (CRM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Shiseido Co Ltd Ord American Depository Shares (SSDOY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Shoals Technologies Group, Inc. - Class A Common Stock (SHLS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	03/14/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Synopsys, Inc. - Common Stock (SNPS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/12/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Tesla, Inc. - Common Stock (TSLA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/15/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Transdigm Group Incorporated Common Stock (TDG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	03/13/2024	04/04/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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

## INVESTMENT VEHICLE DETAILS

- 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 , 04/07/2024