



# 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	Alamo Group, Inc. Common Stock (ALG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	10/25/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Alibaba Group Holding Limited American Depository Shares each representing eight Ordinary share (BABA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	10/16/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Allegro MicroSystems, Inc. - Common Stock (ALGM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	10/17/2024	11/05/2024	\$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	P	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	AppFolio, Inc. - Class A Common Stock (APPF) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	10/31/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New	P	10/02/2024	11/05/2024	\$15,001 - \$50,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	P	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Blackstone Inc. Common Stock (BX) [ST]	P	10/24/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Booking Holdings Inc. - Common Stock (BKNG) [ST]	S (partial)	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Broadcom Inc. - Common Stock (AVGO) [ST]	S (partial)	10/03/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Chord Energy Corporation - Common Stock (CHRD) [ST]	P	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		DISCO CORP UNSP /ADR (DSCSY) [ST]	P	10/25/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		DISCO CORP UNSP /ADR (DSCSY) [ST]	P	10/28/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		EEN ENERGY HLDGS UNSP/ADR (XNGSY) [ST]	P	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Eli Lilly and Company Common Stock (LLY) [ST]	S (partial)	10/16/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New					

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Enerpac Tool Group Corp. Common Stock (EPAC) [ST]	P	10/25/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Gates Industrial Corporation plc Ordinary Shares (GTES) [ST]	P	10/31/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Home Depot, Inc. (HD) [ST]	P	10/03/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		ICU Medical, Inc. - Common Stock (ICUI) [ST]	S (partial)	10/31/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		International Business Machines Corporation Common Stock (IBM) [ST]	P	10/10/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		ITT Inc. Common Stock (ITT) [ST]	S (partial)	10/31/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		KKR & Co. Inc. Common Stock (KKR) [ST]	S (partial)	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Lam Research Corporation - Common Stock (LRCX) [ST]	S (partial)	10/22/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Lam Research Corporation - Common Stock (LRCX) [ST]	S (partial)	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New					

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Manulife Financial Corporation Common Stock (MFC) [ST]	S (partial)	10/04/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Manulife Financial Corporation Common Stock (MFC) [ST]	P	10/15/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Meta Platforms, Inc. - Class A Common Stock (META) [ST]	S (partial)	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Microsoft Corporation - Common Stock (MSFT) [ST]	S (partial)	10/03/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Microsoft Corporation - Common Stock (MSFT) [ST]	S (partial)	10/02/2024	11/05/2024	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	MongoDB, Inc. - Class A Common Stock (MDB) [ST]	S	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Netflix, Inc. - Common Stock (NFLX) [ST]	S (partial)	10/18/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	NVIDIA Corporation - Common Stock (NVDA) [ST]	S (partial)	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Pacific Premier Bancorp Inc - Common Stock (PPBI) [ST]	P	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New					

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		SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		PayPal Holdings, Inc. - Common Stock (PYPL) [ST]	P	10/24/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) [ST]	S (partial)	10/23/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		ServiceNow, Inc. Common Stock (NOW) [ST]	P	10/04/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		ServiceNow, Inc. Common Stock (NOW) [ST]	P	10/08/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Stifel Financial Corporation Common Stock (SF) [ST]	S (partial)	10/31/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]	S (partial)	10/24/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST]	S (partial)	10/04/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		TE Connectivity plc Ordinary Shares (TEL) [ST]	P	10/04/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		TE Connectivity plc Ordinary Shares (TEL) [ST]	P	10/03/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New					

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		TECHTRONIC INDUS LTD ADR (TTNDY) [ST]	P	10/28/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		TECHTRONIC INDUS LTD ADR (TTNDY) [ST]	P	10/29/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		Tesla, Inc. - Common Stock (TSLA) [ST]	S (partial)	10/14/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		Texas Capital Bancshares, Inc. - Common Stock (TCBI) [ST]	P	10/31/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		Transdigm Group Incorporated Common Stock (TDG) [ST]	S (partial)	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		U.S. Physical Therapy, Inc. Common Stock (USPH) [ST]	P	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		Vertiv Holdings, LLC Class A Common Stock (VRT) [ST]	P	10/17/2024	11/05/2024	\$1,001 - \$15,000	<input 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>.

## 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 , 11/06/2024