



# PERIODIC TRANSACTION REPORT

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## FILER INFORMATION

**Name:** Hon. Jefferson Shreve**Status:** Member**State/District:** IN06

## TRANSACTIONS

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		Accenture plc Class A Ordinary Shares (ACN) [ST]	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Advanced Micro Devices, Inc. (AMD) [ST]	P	03/31/2025	04/03/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Advanced Micro Devices, Inc. (AMD) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Agilent Technologies, Inc. Common Stock (A) [ST]	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Air Products and Chemicals, Inc. Common Stock (APD) [ST]	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	Akamai Technologies, Inc. - Common Stock (AKAM) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	American Express Company Common Stock (AXP) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	American International Group, Inc. New Common Stock (AIG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	Analog Devices, Inc. - Common Stock (ADI) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	03/05/2025	03/28/2025	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
	Analog Devices, Inc. - Common Stock (ADI) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Aon plc Class A Ordinary Shares (AON) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	Apple Inc. - Common Stock (AAPL) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Applied Materials, Inc. - Common Stock (AMAT) [ST] FILING STATUS: New	P	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Applovin Corporation - Class A	Common Stock (APP) [ST]	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Ares Management Corporation Class A	Common Stock (ARES) [ST]	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Arista Networks, Inc. Common Stock	(ANET) [ST]	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Autodesk, Inc. - Common Stock	(ADSK) [ST]	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Axon Enterprise, Inc. - Common Stock	(AXON) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Ball Corporation Common Stock	(BALL) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Becton, Dickinson and Company	Common Stock (BDX) [ST]	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	BlackRock, Inc. Common Stock (BLK) [ST]	P	03/31/2025	04/03/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Block, Inc. Class A Common Stock, (XYZ) [ST]	P	03/31/2025	04/03/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Broadcom Inc. - Common Stock (AVGO) [ST]	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Buckle, Inc. (BKE) [ST]	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Caesars Entertainment, Inc. - Common Stock (CZR) [ST]	P	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Caesars Entertainment, Inc. - Common Stock (CZR) [ST]	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Caterpillar, Inc. Common Stock (CAT) [ST]	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Choe Global Markets, Inc. (CBOE) [ST]	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New					

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Cboe Global Markets, Inc. (CBOE) [ST]	P		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Centene Corporation Common Stock (CNC) [ST]	P		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Chipotle Mexican Grill, Inc. Common Stock (CMG) [ST]	S		03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Coinbase Global, Inc. - Class A Common Stock (COIN) [ST]	S		03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Comcast Corporation - Class A Common Stock (CMCSA) [ST]	P		03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	ConocoPhillips Common Stock (COP) [ST]	S		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Constellation Energy Corporation - Common Stock (CEG) [ST]	S		03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

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	Costco Wholesale Corporation - Common Stock (COST) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	CSX Corporation (CSX) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Delta Air Lines, Inc. Common Stock (DAL) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Dollar General Corporation Common Stock (DG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	DuPont de Nemours, Inc. Common Stock (DD) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	EPAM Systems, Inc. Common Stock (EPAM) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Exponent, Inc. - Common Stock (EXPO) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	First Busey Corporation - Common Stock (BUSE) [ST] FILING STATUS: New	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>

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		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Fortune Brands Innovations, Inc.	Common Stock (FBIN) [ST]	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Gilead Sciences, Inc. - Common Stock (GILD) [ST]		P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Goldman Sachs Group, Inc. (GS) [ST]		P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Halliburton Company Common Stock (HAL) [ST]		S (partial)	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Harley-Davidson, Inc. Common Stock (HOG) [ST]		P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Heico Corporation Common Stock (HEIA) [ST]		P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Herc Holdings Inc. Common Stock (HRI) [ST]		S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

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	Highwoods Properties, Inc. Common Stock (HIW) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	Highwoods Properties, Inc. Common Stock (HIW) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	HNI Corporation Common Stock (HNI) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Home BancShares, Inc. Common Stock (HOMB) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Home Depot, Inc. (HD) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Hubbell Inc Common Stock (HUBB) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	IDACORP, Inc. Common Stock (IDA) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
	IDEX Corporation Common Stock (IEX) [ST] FILING STATUS: New	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>



ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	P		03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Intel Corporation - Common Stock (INTC) [ST]	P		03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	ITT Inc. Common Stock (ITT) [ST]	S		03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Johnson & Johnson Common Stock (JNJ) [ST]	P		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	JP Morgan Chase & Co. Common Stock (JPM) [ST]	S (partial)		03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Lam Research Corporation - Common Stock (LRCX) [ST]	P		03/31/2025	04/03/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Lam Research Corporation - Common Stock (LRCX) [ST]	S (partial)		03/05/2025	03/28/2025	\$50,001 - \$100,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						

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	Lazard, Inc.	Common Stock (LAZ) [ST]	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Lennar Corporation	Class A Common Stock (LEN) [ST]	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	LGI Homes, Inc. -	Common Stock (LGIH) [ST]	P	03/05/2025	03/27/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Littelfuse, Inc. -	Common Stock (LFUS) [ST]	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Marathon Petroleum Corporation	Common Stock (MPC) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Marvell Technology, Inc. -	Common Stock (MRVL) [ST]	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	McDonald's Corporation	Common Stock (MCD) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Newmont Corporation (NEM) [ST]		P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New					

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		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Nike, Inc.	Common Stock (NKE) [ST]	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Norfolk Southern Corporation	Common Stock (NSC) [ST]	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Nucor Corporation	Common Stock (NUE) [ST]	S	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Nucor Corporation	Common Stock (NUE) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	nVent Electric plc	Ordinary Shares (NVT) [ST]	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	NVIDIA Corporation	- Common Stock (NVDA) [ST]	S (partial)	03/31/2025	04/03/2025	\$100,001 - \$250,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Oracle Corporation	Common Stock (ORCL) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

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	PayPal Holdings, Inc. - Common Stock (PYPL) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Prudential Financial, Inc. Common Stock (PRU) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	Quanta Services, Inc. Common Stock (PWR) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Rapid7, Inc. - Common Stock (RPD) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	RLI Corp. Common Stock (RLI) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Ross Stores, Inc. - Common Stock (ROST) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Schlumberger N.V. Common Stock (SLB) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	Schneider National, Inc. Common Stock (SNDR) [ST] FILING STATUS: New	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>

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		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		ServiceNow, Inc. Common Stock (NOW) [ST]	S	03/31/2025	04/03/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Simon Property Group, Inc. Common Stock (SPG) [ST]	S	03/31/2025	04/03/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Stryker Corporation Common Stock (SYK) [ST]	S (partial)	03/13/2025	03/28/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Synopsys, Inc. - Common Stock (SNPS) [ST]	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Sysco Corporation Common Stock (SYY) [ST]	S (partial)	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Target Corporation Common Stock (TGT) [ST]	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Texas Instruments Incorporated - Common Stock (TXN) [ST]	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

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	Texas Instruments Incorporated - Common Stock (TXN) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	The Carlyle Group Inc. - Common Stock (CG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	The Trade Desk, Inc. - Class A Common Stock (TTD) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Trane Technologies plc (TT) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Transdigm Group Incorporated Common Stock (TDG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	United Community Banks, Inc. Common Stock (UCB) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	UnitedHealth Group Incorporated Common Stock (UNH) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Valero Energy Corporation Common Stock (VLO) [ST] FILING STATUS: New	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Vaxcyte, Inc. - Common Stock (PCVX) [ST]	S		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Vertex Pharmaceuticals Incorporated - Common Stock (VRTX) [ST]	P		03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Vicor Corporation - Common Stock (VICR) [ST]	P		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Vicor Corporation - Common Stock (VICR) [ST]	S		03/31/2025	04/03/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Vishay Intertechnology, Inc. Common Stock (VSH) [ST]	S		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Vistra Corp. Common Stock (VST) [ST]	P		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Walt Disney Company (DIS) [ST]	S (partial)		03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	Wells Fargo & Company Common Stock (WFC) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	Western Digital Corporation - Common Stock (WDC) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	03/13/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Weyerhaeuser Company Common Stock (WY) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/13/2025	03/28/1935	\$15,001 - \$50,000	<input type="checkbox"/>
	Zoetis Inc. Class A Common Stock (ZTS) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	03/05/2025	03/28/2025	\$15,001 - \$50,000	<input type="checkbox"/>

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

## INVESTMENT VEHICLE DETAILS

- o CRT - Standard Unit Trust

## 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. Jefferson Shreve , 04/11/2025