



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?
	AbbVie Inc. Common Stock (ABBV) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/17/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	Adobe Inc. - Common Stock (ADBE) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Advanced Micro Devices, Inc. (AMD) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	Agilent Technologies, Inc. Common Stock (A) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Akamai Technologies, Inc. - Common Stock (AKAM) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		Albemarle Corporation Common Stock (ALB) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		American Express Company Common Stock (AXP) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		American Water Works Company, Inc. Common Stock (AWK) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Amgen Inc. - Common Stock (AMGN) [ST]	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Apple Inc. - Common Stock (AAPL) [ST]	P	04/07/2025	04/25/2025	\$100,001 - \$250,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Applied Materials, Inc. - Common Stock (AMAT) [ST]	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Applied Materials, Inc. - Common Stock (AMAT) [ST]	P	04/17/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Applovin Corporation - Class A Common Stock (APP) [ST]	P	04/07/2025	04/25/2025	\$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					
		Aptiv PLC Ordinary Shares (APTV) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		Ares Management Corporation Class A Common Stock (ARES) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/17/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		Arista Networks, Inc. Common Stock (ANET) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		Autodesk, Inc. - Common Stock (ADSK) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		AvalonBay Communities, Inc. Common Stock (AVB) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		Ball Corporation Common Stock (BALL) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		Bank of America Corporation Common Stock (BAC) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
		BlackRock, Inc. Common Stock (BLK) [ST]	P	04/07/2025	04/25/2025	\$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]	S (partial)	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Booking Holdings Inc. - Common Stock (BKNG) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Broadcom Inc. - Common Stock (AVGO) [ST]	S (partial)	04/17/2025	04/25/2025	\$100,001 - \$250,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Brunswick Corporation Common Stock (BC) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Buckle, Inc. (BKE) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Carnival Corporation Common Stock (CCL) [ST]	S	04/07/2025	04/25/2025	\$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]	P	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New					

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		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Cboe Global Markets, Inc. (CBOE) [ST]	P		04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Cheniere Energy, Inc. Common Stock (LNG) [ST]	S (partial)		04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Chevron Corporation Common Stock (CVX) [ST]	P		04/07/2025	04/25/2025	\$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]	P		04/17/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Cintas Corporation - Common Stock (CTAS) [ST]	P		04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Citizens Financial Group, Inc. Common Stock (CFG) [ST]	S		04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Clorox Company (CLX) [ST]	S (partial)		04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						

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		ConocoPhillips Common Stock (COP) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		ConocoPhillips Common Stock (COP) [ST]	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Crown Castle Inc. Common Stock (CCI) [ST]	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		CSX Corporation (CSX) [ST]	P	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Danaher Corporation Common Stock (DHR) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Devon Energy Corporation Common Stock (DVN) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		DexCom, Inc. - Common Stock (DXCM) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Discover Financial Services Common Stock (DFS) [ST]	S (partial)	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New					

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		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Ecolab Inc.	Common Stock (ECL) [ST]	P	04/07/2025	04/25/2025	\$100,001 - \$250,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Edwards Lifesciences Corporation	Common Stock (EW) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Exxon Mobil Corporation	Common Stock (XOM) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Fidelity National Information Services, Inc.	Common Stock (FIS) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	First Busey Corporation -	Common Stock (BUSE) [ST]	S (partial)	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Fortune Brands Innovations, Inc.	Common Stock (FBIN) [ST]	S	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Freeport-McMoRan, Inc.	Common Stock (FCX) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

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	GE Aerospace Common Stock (GE) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Gen Digital Inc. - Common Stock (GEN) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Goldman Sachs Group, Inc. (GS) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Halliburton Company Common Stock (HAL) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Harley-Davidson, Inc. Common Stock (HOG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Heico Corporation Common Stock (HEIA) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Herc Holdings Inc. Common Stock (HRI) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Herc Holdings Inc. Common Stock (HRI) [ST] FILING STATUS: New	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>

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	SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Hilton Worldwide Holdings Inc. Common Stock (HLT) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Home BancShares, Inc. Common Stock (HOMB) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Home Depot, Inc. (HD) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Honeywell International Inc. (HON) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	IDEXX Laboratories, Inc. - Common Stock (IDXX) [ST]	P	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Intel Corporation - Common Stock (INTC) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	International Flavors & Fragrances, Inc. Common Stock (IFF) [ST]	S	04/07/2025	04/25/2025	\$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?
	Intuit Inc. - Common Stock (INTU) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$100,001 - \$250,000	<input type="checkbox"/>
	Intuitive Surgical, Inc. - Common Stock (ISRG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Keysight Technologies Inc. Common Stock (KEYS) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Lam Research Corporation - Common Stock (LRCX) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	LGI Homes, Inc. - Common Stock (LGIH) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Lincoln Electric Holdings, Inc. - Common Shares (LECO) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Linde plc - Ordinary Shares (LIN) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	Littelfuse, Inc. - Common Stock (LFUS) [ST] FILING STATUS: New	P	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>

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		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Lockheed Martin Corporation	Common Stock (LMT) [ST]	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Lowe's Companies, Inc.	Common Stock (LOW) [ST]	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	lululemon athletica inc. - Common	Stock (LULU) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	lululemon athletica inc. - Common	Stock (LULU) [ST]	S (partial)	04/17/2025	04/25/2025	\$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]	P	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Mastercard Incorporated	Common Stock (MA) [ST]	S (partial)	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Match Group, Inc. - Common	Stock (MTCH) [ST]	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					

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	McDonald's Corporation Common Stock (MCD) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Merck & Company, Inc. Common Stock (MRK) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Meta Platforms, Inc. - Class A Common Stock (META) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Meta Platforms, Inc. - Class A Common Stock (META) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	04/07/2025	04/25/2025	\$100,001 - \$250,000	<input type="checkbox"/>
	Microchip Technology Incorporated - Common Stock (MCHP) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Micron Technology, Inc. - Common Stock (MU) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$250,001 - \$500,000	<input type="checkbox"/>
	Morgan Stanley Common Stock (MS) [ST] FILING STATUS: New	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>

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		SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Netflix, Inc. - Common Stock (NFLX) [ST]	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		NextEra Energy, Inc. Common Stock (NEE) [ST]	P	04/17/2025	04/25/2025	\$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]	S	04/11/2025	04/25/2025	\$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)	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Occidental Petroleum Corporation Common Stock (OXY) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Oracle Corporation Common Stock (ORCL) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Palo Alto Networks, Inc. (PANW) [ST]	S	04/07/2025	04/25/2025	\$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	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Pembroke Pines FL Cap Impt Re 5.000 [CS] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/14/2025	04/25/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	Pepsico, Inc. (PEP) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Pfizer, Inc. Common Stock (PFE) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Phillips 66 Common Stock (PSX) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Prologis, Inc. Common Stock (PLD) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	QUALCOMM Incorporated - Common Stock (QCOM) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Rapid7, Inc. - Common Stock (RPD) [ST] FILING STATUS: New	P	04/07/2025	04/25/2025	\$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					
	Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) [ST]	S		04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Repligen Corporation - Common Stock (RGEN) [ST]	S		04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Ross Stores, Inc. - Common Stock (ROST) [ST]	P		04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Royal Gold, Inc. - Common Stock (RGLD) [ST]	P		04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	S&P Global Inc. Common Stock (SPGI) [ST]	P		04/17/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Salesforce, Inc. Common Stock (CRM) [ST]	S		04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Sandisk Corporation - Common Stock (SNDK) [ST]	S		04/07/2025	04/25/2025	\$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?
	Schlumberger N.V. Common Stock (SLB) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Schneider National, Inc. Common Stock (SNDR) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Spotify Technology S.A. Ordinary Shares (SPOT) [ST] FILING STATUS: New SUBHOLDING OF: CRT - NIMCRUT DESCRIPTION: Portfolio Rebalance	P	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Stag Industrial, Inc. Common Stock (STAG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	Stag Industrial, Inc. Common Stock (STAG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S (partial)	04/11/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	Stag Industrial, Inc. Common Stock (STAG) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Starbucks Corporation - Common Stock (SBUX) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	Stryker Corporation Common Stock (SYK) [ST] FILING STATUS: New	P	04/17/2025	04/25/2025	\$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					
		Synopsys, Inc. - Common Stock (SNPS) [ST]	P	04/17/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Target Corporation Common Stock (TGT) [ST]	S	04/07/2025	04/25/2025	\$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	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		The Carlyle Group Inc. - Common Stock (CG) [ST]	P	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		The Carlyle Group Inc. - Common Stock (CG) [ST]	S (partial)	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		The Trade Desk, Inc. - Class A Common Stock (TTD) [ST]	S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
		Thermo Fisher Scientific Inc Common Stock (TMO) [ST]	S	04/07/2025	04/25/2025	\$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?
	TJX Companies, Inc. (TJX) [ST]		P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Trane Technologies plc (TT) [ST]		P	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Transdigm Group Incorporated Common Stock (TDG) [ST]		P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Uber Technologies, Inc. Common Stock (UBER) [ST]		P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	United Parcel Service, Inc. Common Stock (UPS) [ST]		P	04/07/2025	04/25/2025	\$50,001 - \$100,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	United Parcel Service, Inc. Common Stock (UPS) [ST]		S (partial)	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	UnitedHealth Group Incorporated Common Stock (UNH) [ST]		P	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance						
	Valero Energy Corporation Common Stock (VLO) [ST]		S	04/07/2025	04/25/2025	\$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					
	Visa Inc. (V) [ST]		S (partial)	04/07/2025	04/25/2025	\$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]		S	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Walmart Inc. Common Stock (WMT) [ST]		P	04/11/2025	04/25/2025	\$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)	04/07/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Western Digital Corporation - Common Stock (WDC) [ST]		P	04/17/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Weyerhaeuser Company Common Stock (WY) [ST]		S	04/11/2025	04/25/2025	\$15,001 - \$50,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance					
	Workday, Inc. - Class A Common Stock (WDAY) [ST]		P	04/07/2025	04/25/2025	\$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?
	Zoetis Inc. Class A Common Stock (ZTS) [ST] FILING STATUS: New SUBHOLDING OF: CRT - Standard Unit Trust DESCRIPTION: Portfolio Rebalance	P	04/07/2025	04/25/2025	\$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	S (partial)	04/17/2025	04/25/2025	\$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

- CRT - NIMCRUT
- 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 , 05/08/2025