



Filing ID #20033576

# 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		BHP Group Limited American Depositary Shares (BHP) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	11/19/2025	12/04/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		CSW Industrials, Inc. Common Stock (CSW) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	11/17/2025	12/04/2025	\$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	S (partial)	11/21/2025	12/04/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Edwards Lifesciences Corporation Common Stock (EW) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	11/19/2025	12/04/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT		Fidelity National Information Services, Inc. Common Stock (FIS) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	11/19/2025	12/04/2025	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT		Home Depot, Inc. (HD) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	11/19/2025	12/04/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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	JT	HubSpot, Inc. Common Stock (HUBS) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	11/19/2025	12/04/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	JT	KKR & Co. Inc. Common Stock (KKR) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	11/19/2025	12/04/2025	\$1,001 - \$15,000	<input checked="" type="checkbox"/>

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

INVESTMENT VEHICLE DETAILS

- 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 , 12/29/2025