



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		Air Products and Chemicals, Inc. Common Stock (APD) [ST]	P	03/05/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Alcon Inc. Ordinary Shares (ALC) [ST]	S	03/12/2026	04/07/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		CBIZ, Inc. Common Stock (CBZ) [ST]	S	03/05/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Columbia Banking System, Inc. - Common Stock (COLB) [ST]	S	03/05/2026	04/07/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Crown Castle Inc. Common Stock (CCI) [ST]	S (partial)	03/24/2026	04/07/2026	\$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]	S (partial)	03/24/2026	04/07/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

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JT		Fabrinet Ordinary Shares (FN) [ST]	P	03/24/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		First Watch Restaurant Group, Inc. - Common Stock (FWRG) [ST]	S	03/05/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		HDFC Bank Limited Common Stock (HDB) [ST]	S (partial)	03/12/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Infineon Technologies AG (IFNNY) [ST]	S	03/12/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Intapp, Inc. - Common Stock (INTA) [ST]	S	03/12/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		La-Z-Boy Incorporated Common Stock (LZB) [ST]	S	03/12/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Microsoft Corporation - Common Stock (MSFT) [OP]	P	03/25/2026	04/07/2026	\$50,001 - \$100,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$325; Expires 06/18/2026					
JT		Microsoft Corporation - Common Stock (MSFT) [OP]	P	03/25/2026	04/07/2026	\$500,001 - \$1,000,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$320; Expires 06/18/2026					
JT		NetEase, Inc. - American Depositary Shares, each representing 5 ordinary shares (NTES) [ST]	S (partial)	03/05/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New					

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SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		Phreesia, Inc. Common Stock (PHR) [ST]	S	03/05/2026	04/07/2026	\$1,001 - \$15,000	<input type="checkbox"/>
FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1							
JT		Sea Limited American Depositary Shares, each representing one Class A Ordinary Share (SE) [ST]	P	03/10/2026	04/07/2026	\$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	03/06/2026	04/07/2026	\$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 - Portfolio Management Active Assets Account (Owner: JT)
LOCATION: US
- 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 , 04/08/2026