



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		3M Company Common Stock (MMM) [ST]	S (partial)	04/28/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Advanced Micro Devices, Inc. (AMD) [ST]	P	04/27/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Advanced Micro Devices, Inc. (AMD) [ST]	P	04/23/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Ally Financial Inc. Common Stock (ALLY) [ST]	S	04/09/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3					
JT		AT&T Inc. (T) [ST]	S	04/09/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3					
JT		CBIZ, Inc. Common Stock (CBZ) [ST]	P	04/06/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

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JT	Darden Restaurants, Inc. Common Stock (DRI) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	Dollar Tree, Inc. - Common Stock (DLTR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	First Watch Restaurant Group, Inc. - Common Stock (FWRG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	04/06/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Ford Motor Company Common Stock (F) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	Freeport-McMoRan, Inc. Common Stock (FCX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	04/15/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Goldman Sachs Group, Inc. (GS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	04/16/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Goldman Sachs Group, Inc. (GS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	HDFC Bank Limited Common Stock (HDB) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	04/13/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Home Depot, Inc. (HD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	Infineon Technologies AG (IFNNY)	P	04/13/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	[ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					<input type="checkbox"/>
JT	Intapp, Inc. - Common Stock (INTA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	04/13/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	International Business Machines Corporation Common Stock (IBM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	04/24/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	MarketAxess Holdings, Inc. - Common Stock (MKTX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Martin Marietta Materials, Inc. Common Stock (MLM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	NetEase, Inc. - American Depositary Shares, each representing 5 ordinary shares (NTES) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	04/06/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Performance Food Group Company Common Stock (PFGC) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
JT	ServiceNow, Inc. Common Stock (NOW) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	04/24/2026	05/05/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Synchrony Financial Common Stock (SYF) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>

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JT		Tractor Supply Company - Common Stock (TSCO) [ST]	S	04/09/2026	05/05/2026	\$15,001 - \$50,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3					
JT		Valley National Bancorp (VLY) [ST]	S	04/09/2026	05/05/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Active Asset Account # 3					

* 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 - Active Asset Account # 3 (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 , 05/19/2026