



# 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		Abbott Laboratories Common Stock (ABT) [ST]	S (partial)	05/27/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		AbbVie Inc. Common Stock (ABBV) [ST]	S	05/05/2026	06/02/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Advanced Micro Devices, Inc. (AMD) [ST]	P	05/05/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Analog Devices, Inc. - Common Stock (ADI) [ST]	P	05/19/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	S (partial)	05/04/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Berkshire Hathaway Inc. New Common Stock (BRK.B) [ST]	S (partial)	05/04/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	Fabrinet Ordinary Shares (FN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	05/01/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Intuit Inc. - Common Stock (INTU) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1 DESCRIPTION: 5/26/26 full sale less than \$1,000	S (partial)	05/22/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Lumentum Holdings Inc. - Common Stock (LITE) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	05/22/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Micron Technology, Inc. - Common Stock (MU) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	05/21/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$340; Expires 10/16/2026	S	05/19/2026	06/02/2026	\$250,001 - \$500,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$330; Expires 10/16/2026	S	05/19/2026	06/02/2026	\$500,001 - \$1,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$325; Expires 06/18/2026	P	05/19/2026	06/02/2026	\$250,001 - \$500,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$325; Expires 06/18/2026	P	05/19/2026	06/02/2026	\$500,001 - \$1,000,000	<input type="checkbox"/>

ID	Owner	Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT		NESTLE S.A S/ADR (NSRGY) [ST]	S (partial)	05/14/2026	06/02/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		NESTLE S.A S/ADR (NSRGY) [ST]	S (partial)	05/05/2026	06/02/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Palo Alto Networks, Inc. (PANW) [ST]	P	05/14/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Sandisk Corporation - Common Stock When-Issued (SNDK) [ST]	P	05/07/2026	06/02/2026	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Tri Pointe Homes, Inc. Common Stock (TPH) [ST]	S	05/15/2026	06/02/2026	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Twilio Inc. Class A Common Stock (TWLO) [ST]	P	05/04/2026	06/02/2026	\$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

- Morgan Stanley - Portfolio Management Active Assets Account (Owner: JT)  
LOCATION: US
- Morgan Stanley - Select UMA Account # 1 (Owner: JT)  
LOCATION: US

## INITIAL PUBLIC OFFERINGS

Yes  No

## CERTIFICATION AND SIGNATURE

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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 , 06/03/2026