



PERIODIC TRANSACTION REPORT

Clerk of the House of Representatives • Legislative Resource Center • 135 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		Advanced Micro Devices, Inc. (AMD) [ST]	P	02/22/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Booking Holdings Inc. - Common Stock (BKNG) [ST]	P	02/09/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Booking Holdings Inc. - Common Stock (BKNG) [ST]	P	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Charles Schwab Corporation (SCHW) [ST]	S (partial)	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Cheniere Energy, Inc. Common Stock (LNG) [ST]	S	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
		FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT		Chord Energy Corporation - Common Stock (CHRD) [ST]	P	02/13/2024	03/05/2024	\$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	Cognizant Technology Solutions Corporation - Class A Common Stock (CTSH) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/12/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	DBS GROUP HLDGS LTD S/ADR (DBSDY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/13/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Deere & Company Common Stock (DE) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Eli Lilly and Company Common Stock (LLY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Exact Sciences Corporation - Common Stock (EXAS) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	First Solar, Inc. - Common Stock (FSLR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	Freeport-McMoRan, Inc. Common Stock (FCX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	02/29/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	KKR & Co. Inc. Common Stock (KKR) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
JT	L'Oreal Co. American Depositary Shares (LRLCY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	02/26/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
JT	Meta Platforms, Inc. - Class A Common Stock (META) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" 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 \$170; Expires 01/17/2025 COMMENTS: Ref: 044Q34N6	P	02/13/2024	03/05/2024	\$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 \$170; Expires 01/17/2025 COMMENTS: Ref: 043IK92L	P	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<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 \$170; Expires 01/17/2025 COMMENTS: Ref: 044Q34N4	P	02/13/2024	03/05/2024	\$1,000,001 - \$5,000,000	<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 \$165; Expires 01/17/2025 COMMENTS: Ref: 043IK90L	P	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<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 \$165; Expires 01/17/2025 COMMENTS: Ref: 043IK88L	P	02/12/2024	03/05/2024	\$500,001 - \$1,000,000	<input type="checkbox"/>

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JT	Microsoft Corporation - Common Stock (MSFT) [OP] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$165; Expires 01/17/2025 COMMENTS: Ref: 043IK86L	P	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<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 \$165; Expires 01/17/2025 COMMENTS: Ref: 043IK73L	P	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<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 \$240; Expires 06/20/2025	S	02/13/2024	03/05/2024	\$1,000,001 - \$5,000,000	<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 \$225; Expires 06/20/2025	S	02/13/2024	03/05/2024	\$500,001 - \$1,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account	S (partial)	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<input checked="" 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 \$235; Expires 06/20/2025	S	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<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 \$230; Expires 06/20/2025	S	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
JT	Microsoft Corporation - Common Stock (MSFT) [OP]	S	02/12/2024	03/05/2024	\$500,001 - \$1,000,000	<input type="checkbox"/>

ID	Owner Asset	Transaction Type	Date	Notification Date	Amount	Cap. Gains > \$200?
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$225; Expires 06/20/2025					
JT	Microsoft Corporation - Common Stock (MSFT) [OP]	S	02/12/2024	03/05/2024	\$1,000,001 - \$5,000,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Portfolio Management Active Assets Account DESCRIPTION: Call options; Strike price \$220; Expires 06/20/2025					
JT	Moderna, Inc. - Common Stock (MRNA) [ST]	S	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	MongoDB, Inc. - Class A Common Stock (MDB) [ST]	S (partial)	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Morgan Stanley Common Stock (MS) [ST]	S	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	MSCI Inc. Common Stock (MSCI) [ST]	S	02/01/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	Netflix, Inc. - Common Stock (NFLX) [ST]	S (partial)	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	NVIDIA Corporation - Common Stock (NVDA) [ST]	S (partial)	02/08/2024	03/05/2024	\$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]	S (partial)	02/21/2024	03/05/2024	\$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	Regeneron Pharmaceuticals, Inc. - Common Stock (REGN) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/08/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Taiwan Semiconductor Manufacturing Company Ltd. (TSM) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/09/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	Terex Corporation Common Stock (TEX) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/13/2024	03/05/2024	\$1,001 - \$15,000	<input checked="" type="checkbox"/>
JT	The Trade Desk, Inc. - Class A Common Stock (TTD) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	02/01/2024	03/05/2024	\$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

- 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 , 03/07/2024