



Filing ID #20033576

# PERIODIC TRANSACTION REPORT

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## FILER INFORMATION

**Name:** Hon. Josh Gottheimer**Status:** Member**State/District:** NJ05

## TRANSACTIONS

ID	Owner Asset	Transaction Date Type	Notification Date	Amount	Cap. Gains > \$200?
JT	BHP Group Limited American Depository Shares (BHP) [ST]	S	11/19/2025	12/04/2025	\$1,001 - \$15,000 <input checked="" type="checkbox"/>
	FILING STATUS: New				
	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1				
JT	CSW Industrials, Inc. Common Stock (CSW) [ST]	P	11/17/2025	12/04/2025	\$1,001 - \$15,000 <input type="checkbox"/>
	FILING STATUS: New				
	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1				
JT	DASSAULT SYSTEMES SA ADR (DASTY) [ST]	S (partial)	11/21/2025	12/04/2025	\$1,001 - \$15,000 <input type="checkbox"/>
	FILING STATUS: New				
	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1				
JT	Edwards Lifesciences Corporation Common Stock (EW) [ST]	S	11/19/2025	12/04/2025	\$1,001 - \$15,000 <input checked="" type="checkbox"/>
	FILING STATUS: New				
	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1				
JT	Fidelity National Information Services, Inc. Common Stock (FIS) [ST]	S	11/19/2025	12/04/2025	\$15,001 - \$50,000 <input checked="" type="checkbox"/>
	FILING STATUS: New				
	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1				
JT	Home Depot, Inc. (HD) [ST]	S	11/19/2025	12/04/2025	\$1,001 - \$15,000 <input type="checkbox"/>
	FILING STATUS: New				
	SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1				

ID	Owner Asset	Transaction Date Type	Notification Date	Amount	Cap. Gains > \$200?	
JT	HubSpot, Inc. Common Stock (HUBS) [ST]	S	11/19/2025	12/04/2025	\$1,001 - \$15,000	<input type="checkbox"/>
	FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1					
JT	KKR & Co. Inc. Common Stock (KKR) [ST]	S	11/19/2025	12/04/2025	\$1,001 - \$15,000	<input checked="" 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 - 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