



Filing ID #20032246

# 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		Commvault Systems, Inc. - Common Stock (CVLT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	09/23/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Diageo plc Common Stock (DEO) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	09/22/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Independence Realty Trust, Inc. Common Stock (IRT) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	09/22/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Intuitive Surgical, Inc. - Common Stock (ISRG) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S (partial)	09/03/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		M3 INC UNSP/ADR (MTHRY) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	09/30/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Natera, Inc. - Common Stock (NTRA) [ST] FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	09/22/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>

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JT		SYSMEX CORP UNSP/ASDR (SSMX) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	09/22/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		Tandem Diabetes Care, Inc. - Common Stock (TNDM) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	P	09/22/2025	10/07/2025	\$1,001 - \$15,000	<input type="checkbox"/>
JT		The Baldwin Insurance Group, Inc. - Class A Common Stock (BWIN) [ST]  FILING STATUS: New SUBHOLDING OF: Morgan Stanley - Select UMA Account # 1	S	09/23/2025	10/07/2025	\$1,001 - \$15,000	<input 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	09/11/2025	10/07/2025	\$1,001 - \$15,000	<input 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 - 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 , 10/15/2025