AO 10
Rev. 3/2023

FINANCIAL DISCLOSURE REPORT FOR CALENDAR YEAR 2024

Report Required by the Ethics in Government Act of 1978 (5 U.S.C. app. §§ 13101-13111)

1. Person Reporting (last name, first, middle initial)	2. Court or Organization	3. Date of Report
McHugh, Carolyn B.	10th Circuit Court of Appeals	08/13/2025
4. Title (Article III judges indicate active or senior status; magistrate judges indicate full- or part-time)	**5a. Report Type (check appropriate type)**	**6. Reporting Period**
U.S. Circuit Judge (Active)	☐ Nomination Date ☐ Initial ☑ Annual ☐ Final **5b.** ☐ Amended Report	01/01/2024 **to** 12/31/2024
7. Chambers or Office Address		
125 South State Street 4201 Federal Building Salt Lake City, Utah 84138-1122		

IMPORTANT NOTES: ***The instructions accompanying this form must be followed. Complete all parts, checking the NONE box for each part where you have no reportable information.***

I. POSITIONS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 345 Trustees, Executors, Administrators, and Custodians; § 350 Power of Attorney; § 355 Outside Positions.)*

☑ NONE *(No reportable positions.)*

POSITION	NAME OF ORGANIZATION/ENTITY
1.	
2.	
3.	
4.	
5.	

II. AGREEMENTS. *(Reporting individual only; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 340 Agreements and Arrangements.)*

☐ NONE *(No reportable agreements.)*

DATE	PARTIES AND TERMS
1. 2005	State of Utah - Defined Benefit Pension Plan
2.	
3.	

III. NON-INVESTMENT INCOME. *(Reporting individual and spouse; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 320 Income; § 360 Spouses and Dependent Children.)*

A. Filer's Non-Investment Income

☑ NONE *(No reportable non-investment income.)*

	DATE	SOURCE AND TYPE	INCOME (yours, not spouse's)
1.			
2.			
3.			
4.			

B. Spouse's Non-Investment Income - *If you were married during any portion of the reporting year, complete this section.*

(Dollar amount not required except for honoraria.)

☐ NONE *(No reportable non-investment income.)*

	DATE	SOURCE
1.	2024	Sentry Financial Corporation - salary
2.		
3.		
4.		

IV. REIMBURSEMENTS *-- transportation, lodging, food, entertainment.*

(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)

☑ NONE *(No reportable reimbursements.)*

	SOURCE	DATES	LOCATION	PURPOSE	ITEMS PAID OR PROVIDED
1.					
2.					
3.					
4.					
5.					

V. GIFTS. *(Includes those to spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 330 Gifts and Reimbursements; § 360 Spouses and Dependent Children.)*

☑ NONE *(No reportable gifts.)*

	SOURCE	DESCRIPTION	VALUE
1.			
2.			
3.			
4.			
5.			

VI. LIABILITIES. *(Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 335 Liabilities; § 360 Spouses and Dependent Children.)*

☐ NONE *(No reportable liabilities.)*

	CREDITOR	DESCRIPTION	VALUE CODE
1.	Intercap Lending, Inc.	Mortgage, Investment Property #1	N
2.			
3.			
4.			
5.			

Name of Person Reporting	Date of Report
McHugh, Carolyn B.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure		B. Income during reporting period		C. Gross value at end of reporting period		D. Transactions during reporting period				
		(1) Amount Code 1 (A-H)	(2) Type (e.g., div., rent, or int.)	(1) Value Code 2 (J-P)	(2) Value Method Code 3 (Q-W)	(1) Type (e.g., buy, sell, redemption)	(2) Date mm/dd/yy	(3) Value Code 2 (J-P)	(4) Gain Code 1 (A-H)	
1.	Individual Assets (H)									
2.	Wells Fargo Bank (cash)	A	Interest	N	T					
3.	Voya Whole Life Insurance	B	Dividend	M	T					
4.	JPMorgan Chase (cash)	F	Interest	P1	T					
5.	Zions Bank (cash)	D	Interest	O	T					
6.	UFirst Credit Union (cash)	A	Dividend	J	T	Open	11/05/24	J		
7.	HealthEquity HSA (cash)	A	Interest	K	T					
8.	Investment Property #1, Salt Lake City, UT		None	O	W					
9.	Sentry Financial Corporation		None	P2	U					
10.	Sentry Investments, LLC	G	Int./Div.	P2	U					
11.	Better Body Foods	G	Interest	O	U					
12.	Foster Investments Co., LLC	H1	Int./Div.	P2	U					
13.	Account #1 (H)									
14.	SEI Institutional Managed Trust Insured Deposit (cash)	A	Interest	K	T					
15.	SEI Institutional Managed Trust Core Fixed Income Fund (TRLVX)	E	Dividend	N	T	Buy (add'l)	02/20/24	L		
16.						Sold (part)	03/12/24	N		
17.	SEI Institutional Managed Trust Dynamic Asset Allocation Fund (SDYAX)	D	None	K	T	Sold (part)	02/20/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
18.					Buy (add'l)	02/20/24	K		
19.					Sold (part)	03/12/24	K		
20. SEI Institutional Managed Trust Emerging Mkts Debt Fund (SITEX)	A	Dividend	K	T	Buy (add'l)	02/20/24	J		
21.					Sold (part)	02/20/24	J		
22.					Sold (part)	03/12/24	L		
23. SEI Institutional Managed Trust Emerging Mkts Equity Fund (SIEMX)	A	Dividend	K	T	Buy (add'l)	02/20/24	K		
24.					Sold (part)	03/12/24	L		
25. SEI Institutional Managed Trust Global Managed Vol Fund (SVTAX)	A	Dividend	M	T	Sold (part)	02/20/24	K		
26.					Buy (add'l)	02/20/24	K		
27.					Sold (part)	03/12/24	L		
28. SEI Institutional Managed Trust Government Fund (AABXX) (cash eq.)	A	Dividend	J	T	Buy	02/21/24	L		
29.					Sold (part)	02/22/24	L		
30.					Buy (add'l)	03/13/24	P1		
31.					Sold (part)	03/13/24	P1		
32.					Buy (add'l)	03/20/24	O		
33.					Sold (part)	03/20/24	P1		
34.					Buy (add'l)	04/02/24	J		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
35. SEI Institutional Managed Trust High Yield Bond Fund (SHYAX)	C	Dividend	L	T	Sold (part)	02/20/24	J		
36.					Sold (part)	03/12/24	K		
37. SEI Institutional Managed Trust International Equity Fund (SEITX)	C	Dividend	L	T	Buy (add'l)	02/20/24	K		
38.					Sold (part)	02/20/24	K		
39.					Sold (part)	03/12/24	M		
40. SEI Institutional Managed Trust Large Cap Fund (SLGAX)	D	Dividend	K	T	Sold (part)	02/20/24	L		
41.					Sold (part)	03/12/24	M		
42. SEI Institutional Managed Trust Multi-Asset Accumulation Fund (SAAAX)	C	Dividend	M	T	Sold (part)	02/20/24	M		
43.					Sold (part)	03/12/24	L		
44. SEI Institutional Managed Trust Multi-Asset Cap Stability Fund (SCLAX)	D	Dividend	L	T	Buy (add'l)	02/20/24	J		
45.					Sold (part)	02/20/24	K		
46.					Sold (part)	03/12/24	L		
47. SEI Institutional Managed Trust Multi-Asset Income Fund (SIOAX)	C	Dividend	L	T	Sold (part)	02/20/24	K		
48.					Sold (part)	03/12/24	L		
49. SEI Institutional Managed Trust Multi-Asset Inflation Mgd Fund (SIFAX)	C	Dividend	L	T	Buy (add'l)	02/20/24	J		
50.					Sold (part)	02/20/24	J		
51.					Sold (part)	03/12/24	K		

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52.	SEI Institutional Managed Trust Multi-Strategy Alt Fund (SMSAX)	C	Dividend	L	T	Sold (part)	02/20/24	K		
53.						Sold (part)	03/12/24	J		
54.	SEI Institutional Managed Trust Real Return Fund (SRAAX)	B	Dividend	K	T	Buy (add'l)	02/20/24	J		
55.	SEI Institutional Managed Trust Short-Duration Govt Fund (TCSGX)	B	Dividend	L	T	Buy (add'l)	02/20/24	J		
56.						Sold (part)	03/12/24	L		
57.	SEI Institutional Managed Trust SIMT Liquid Alternative Fund Class F	C	Dividend	L	T	Buy (add'l)	02/20/24	L		
58.						Sold (part)	03/12/24	J		
59.	SEI Institutional Managed Trust Small Cap Fund (SLLAX)	B	Dividend	K	T	Buy (add'l)	02/20/24	J		
60.						Sold (part)	03/12/24	M		
61.	SEI Institutional Managed Trust U.S. Managed Volatility Fund (SVOAX)	D	Dividend	L	T	Buy (add'l)	02/20/24	J		
62.						Sold (part)	02/20/24	K		
63.						Sold (part)	03/12/24	M		
64.	SEI Institutional Managed Trust Ultra Short Bond Fund (SECPX)	B	Dividend	K	T	Buy	02/20/24	J		
65.						Sold (part)	03/12/24	L		
66.	SEI Institutional Managed Trust S&P 500 Index Fund (SSPIX)	B	Dividend			Sold (part)	02/20/24	K		
67.						Sold	03/12/24	M		
68.	SEI Institutional Managed Trust Mid-Cap Fund (SEMCX)		None			Sold	03/12/24	M		

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69. Account #2 (H)									
70. SEI Institutional Managed Trust Insured Deposit (cash)	A	Interest	K	T					
71. ABM Industries Inc. (ABM)	A	Dividend	J	T	Buy	03/22/24	J		
72. Acadia Healthcare Co. Inc. (ACHC)	A	Dividend			Buy	03/22/24	J		
73.					Sold	05/13/24	J		
74. Accenture PLC (ACN)	A	Dividend	J	T	Buy	03/22/24	J		
75. ACCO Brands Corp. (ACCO)	A	Dividend	J	T	Buy	03/22/24	J		
76. Adidas AG (ADDYY)	A	Dividend	J	T	Buy	03/22/24	J		
77.					Buy (add'l)	03/22/24	J		
78.					Buy (add'l)	07/17/24	J		
79.					Sold (part)	11/18/24	J		
80.					Sold (part)	12/03/24	J		
81. Adobe, Inc. (ADBE) (X)		None	J	T					
82. Advance Auto Parts Inc. (AAP)	A	Dividend			Buy	03/22/24	J		
83.					Sold	10/04/24	J		
84. Advanced Drainage Systems Inc. (WMS)	A	Dividend	J	T	Buy	07/30/24	J		
85. Advanced Micro Devices Inc. (AMD)		None	J	T	Buy	03/22/24	J		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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86.					Sold (part)	07/18/24	J		
87.					Sold (part)	07/26/24	J		
88.					Buy (add'l)	08/27/24	J		
89.					Buy (add'l)	08/29/24	J		
90.					Buy (add'l)	10/31/24	J		
91. Aena SME SA (ANYYY)		None			Buy	03/22/24	J		
92. AerCap Holdings NV (AER)	A	Dividend	J	T	Buy	03/22/24	J		
93. AeroVironment Inc. (AVAV)		None			Buy	03/22/24	J		
94. Aflac Inc. (AFL)	A	Dividend	J	T	Buy	03/22/24	J		
95. AGCO Corp. (AGCO)	A	Dividend	J	T	Buy	03/22/24	J		
96. Agilysys Inc (X)		None	J	T					
97. Agilent Technologies Inc. (A)		None			Buy	03/22/24	J		
98. Air Liquide SA (AIQUY)	A	Dividend	J	T	Buy	03/22/24	J		
99.					Buy (add'l)	03/22/24	J		
100. Airbnb Inc. (ABNB)		None	J	T	Buy	03/22/24	J		
101. Alkami Technology Inc (X)		None	J	T					
102. Akzo Nobel NV (AKZOY)	A	Dividend	J	T	Buy	03/22/24	J		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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103. Allianz SE (ALIZY)	A	Dividend	J	T	Buy	03/22/24	J		
104. Allison Transmission Holdings (ALSN)	A	Dividend	J	T	Buy	03/22/24	J		
105. Allstate Corp (ALL)	A	Dividend	J	T	Buy	03/22/24	J		
106. Alphabet Inc. (GOOGL)	A	Dividend	J	T	Buy	03/22/24	J		
107.					Sold (part)	08/06/24	J		
108. Alphabet Inc. (GOOG)	A	Distribution	J	T	Buy	03/22/24	J		
109.					Buy (add'l)	04/24/24	J		
110.					Sold (part)	05/06/24	J		
111.					Sold (part)	08/27/24	J		
112. Alstom SA (ALSMY)	A	Dividend	J	T	Buy	03/22/24	J		
113. Altria Group Inc (X)	A	Dividend	J	T					
114. Amadeus IT Group SA (AMADY)	A	Dividend	J	T	Buy	03/22/24	J		
115. Amazon.com Inc. (AMZN)		None	K	T	Buy	03/22/24	J		
116.					Buy (add'l)	03/22/24	J		
117.					Buy (add'l)	03/22/24	J		
118. Amazon.com Inc.Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
119. American Electric Power Co. Inc.Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
120. American Express Co. (AXP)	A	Dividend	J	T	Buy	03/22/24	J		
121.					Sold (part)	09/20/24	J		
122. American Express Co. Bonds	A	Interest	J	T	Buy	03/28/24	J		
123. American International Group Inc. (AIG)	A	Dividend	J	T	Buy	03/22/24	J		
124.					Buy (add'l)	03/22/24	J		
125. Ameriprise Financial Inc. (AMP)	A	Dividend	J	T	Buy	03/22/24	J		
126. Ametek Inc. (AME)	A	Dividend	J	T	Buy	10/14/24	J		
127. Amgen Inc. (AMGN)	A	Dividend			Buy	03/22/24	J		
128.					Sold (part)	04/02/24	J		
129.					Sold	12/11/24	J		
130. AMN Healthcare Services Inc. (AMN)	A	Dividend			Buy	03/22/24	J		
131.					Sold	05/13/24	J		
132. Amphenol Corp. (APH)	A	Dividend	J	T	Buy	03/22/24	J		
133.					Buy (add'l)	03/22/24	J		
134.					Buy (add'l)	07/30/24	J		
135. Analog Devices Inc. (ADI)	A	Dividend	J	T	Buy	03/22/24	J		
136. Anglo American PLC (NGLOY) (X)	A	Dividend			Sold	04/24/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
137. Anheuser-Busch InBev SA/NV (BUD)	A	Dividend	J	T	Buy	03/22/24	J		
138. ANSYS Inc (X)		None	J	T					
139. Apple Inc. (AAPL)	A	Dividend	K	T	Buy	03/22/24	J		
140.					Buy (add'l)	03/22/24	J		
141.					Buy (add'l)	03/22/24	J		
142.					Buy (add'l)	05/21/24	J		
143.					Buy (add'l)	07/29/24	J		
144.					Buy (add'l)	08/06/24	J		
145.					Sold (part)	10/15/24	J		
146. Apple Inc.Corp. Bonds	A	Interest	J	T	Buy	04/16/24	J		
147. Applied Materials Inc. (AMAT)	A	Dividend	J	T	Buy	03/22/24	J		
148.					Buy (add'l)	03/22/24	J		
149.					Buy (add'l)	03/22/24	J		
150. AppLovin Corp. (APP)	A	Dividend	J	T	Buy	04/11/24	J		
151.					Buy (add'l)	04/12/24	J		
152.					Buy (add'l)	05/06/24	J		
153.					Buy (add'l)	05/13/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
154.					Buy (add'l)	08/09/24	J		
155.					Sold (part)	09/19/24	J		
156.					Sold (part)	09/20/24	J		
157.					Sold (part)	09/25/24	J		
158.					Sold (part)	10/07/24	J		
159.					Sold (part)	10/15/24	J		
160.					Sold (part)	11/12/24	J		
161.					Sold (part)	11/21/24	J		
162.					Buy (add'l)	11/27/24	J		
163. Aptiv Irish Holdings Ltd. (B783TY6)		None			Buy	03/22/24	J		
164. ArcelorMittal SA (X)	A	Dividend	J	T					
165. Ares Management Corp. (ARES)	A	Dividend			Buy	03/22/24	J		
166.					Sold	07/30/24	J		
167. Arista Networks Inc. (BN33VM5)		None	J	T	Buy	03/22/24	J		
168. ASML Holding NV (ASML)	A	Dividend	J	T	Buy	03/22/24	J		
169.					Buy (add'l)	03/22/24	J		
170.					Buy (add'l)	07/15/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
D =$5,001 - $15,000
E =$15,001 - $50,000
F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
P2 =$5,000,001 - $25,000,000
P3 =$25,000,001 - $50,000,000
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3. Value Method Codes (See Column C2)
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R =Cost (Real Estate Only)
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
171.					Sold (part)	09/10/24	J		
172.					Sold (part)	10/17/24	J		
173.					Buy (add'l)	12/05/24	J		
174.					Sold (part)	12/12/24	J		
175. Assa Abloy AB (ASAZY)		None			Buy	03/22/24	J		
176. Astec Industries Inc. (ASTE)	A	Dividend	J	T	Buy	03/22/24	J		
177. Astera Labs Inc. (ALAB)		None	J	T	Buy	08/27/24	J		
178.					Sold (part)	12/05/24	J		
179.					Sold (part)	12/27/24	J		
180. AstraZeneca PLC (AZN)	A	Dividend	J	T	Buy	03/22/24	J		
181.					Buy (add'l)	04/30/24	J		
182.					Sold (part)	06/26/24	J		
183. AT&T Inc. (T)	A	Dividend	J	T	Buy	03/22/24	J		
184. AT&T Inc. Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
185. Atkore Inc (X)	A	Dividend	J	T					
186. AutoNation Inc. (AN)		None	J	T	Buy	03/22/24	J		
187. Avery Dennison Corp. (AVY)	A	Dividend	J	T	Buy	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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188. AXA SA (AXAHY)	A	Dividend	J	T	Buy	03/22/24	J		
189. Axon Enterprise Inc. (AXON)		None	J	T	Buy	07/30/24	J		
190.					Sold (part)	11/11/24	J		
191. AZEK Co. Inc. (AZEK)		None	J	T	Buy	03/22/24	J		
192. B3 SA - Brasil Bolsa Balcao (BOLSY)	A	Dividend			Buy	03/22/24	J		
193.					Sold	06/24/24	J		
194. Badger Meter Inc (X)	A	Dividend	J	T					
195. Baker Hughes Co. (BKR)	A	Dividend	J	T	Buy	03/22/24	J		
196. Banco Bilbao Vizcaya Argentaria SA (BBVA)	A	Dividend			Buy	03/22/24	J		
197.					Sold	05/03/24	J		
198. Bank of America Corp. (BAC)	A	Dividend	J	T	Buy	03/22/24	J		
199.					Buy (add'l)	03/22/24	J		
200.					Buy (add'l)	10/14/24	J		
201. Bank of New York Melllon Corp. (BK)	A	Dividend	J	T	Buy	03/22/24	J		
202. Barclays PLC (BCS)	A	Dividend	J	T	Buy	03/22/24	J		
203.					Buy (add'l)	10/14/24	J		
204. Barnes Group Inc. (2080732)	A	Dividend	J	T	Buy	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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205. Barrick Gold Corp (X)	A	Dividend	J	T					
206. Baxter International Inc. (BAX)	A	Dividend	J	T	Buy	06/21/24	J		
207. Beiersdorf AG (BDRFY)	A	Dividend	J	T	Buy	03/22/24	J		
208. Berry Global Group Inc (X)	A	Dividend	J	T					
209. Berkeley Group Holdings PLC (B3DTJZ2)	A	Dividend	J	T	Buy	07/24/24	J		
210. BioNTech SE (BNTX)		None	J	T	Buy	09/25/24	J		
211. Blackstone Inc. (BX)	A	Dividend	J	T	Buy	03/22/24	J		
212. Bloomin' Brands Inc.	A	Dividend	J	T	Buy	03/22/24	J		
213.					Buy (add'l)	11/25/24	J		
214. BNP Paribas SA (BNPQY)	A	Dividend	J	T	Buy	03/22/24	J		
215. Boeing (BA)		None	J	T	Buy	03/22/24	J		
216.					Buy (add'l)	10/29/24	J		
217. Booz Allen Hamiltion Holding Corp. (BAH)	A	Dividend			Buy	03/22/24	J		
218.					Sold	07/30/24	J		
219. BorgWarner Inc (X)	A	Dividend	J	T					
220. Boston Scientific Corp. (BSX)		None	J	T	Buy	03/22/24	J		
221.					Buy (add'l)	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000
F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000
N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
222.					Sold (part)	10/22/24	J		
223. BP PLC (BP)	A	Dividend	J	T	Buy	03/22/24	J		
224. Brinker International Inc. (EAT)		None	J	T	Buy	03/22/24	J		
225.					Sold (part)	05/31/24	J		
226.					Sold (part)	07/02/24	J		
227.					Sold (part)	07/09/24	J		
228.					Sold (part)	11/25/24	J		
229. Bristol-Meyers Squibb Co. (BMY)	A	Dividend	J	T	Buy	03/22/24	J		
230. British American Tobacco PLC (BTI)	A	Dividend	J	T	Buy	03/22/24	J		
231. Broadcom Inc. (AVGO)	A	Dividend	K	T	Buy	03/22/24	J		
232.					Buy (add'l)	03/22/24	J		
233.					Buy (add'l)	03/22/24	J		
234.					Buy (add'l)	09/03/24	J		
235.					Sold (part)	11/05/24	J		
236.					Sold (part)	11/15/24	J		
237.					Buy (add'l)	12/16/24	J		
238. Broadridge Financial Solutions Inc. (BR)	A	Dividend	J	T	Buy	07/30/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
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Name of Person Reporting	Date of Report
McHugh, Carolyn B.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
239. Brown-Forman Corp. (BF/B)	A	Dividend	J	T	Buy	06/28/24	J		
240. Burlington Stores Inc. (BURL)		None	J	T	Buy	03/22/24	J		
241.					Buy (add'l)	07/30/24	J		
242.					Buy (add'l)	11/05/24	J		
243.					Buy (add'l)	11/15/24	J		
244.					Sold (part)	11/27/24	J		
245.					Sold (part)	12/27/24	J		
246. Cadence Design Systems Inc. (CDNS)		None	J	T	Buy	03/22/24	J		
247.					Buy (add'l)	03/22/24	J		
248.					Buy (add'l)	03/22/24	J		
249.					Buy (add'l)	07/30/24	J		
250.					Buy (add'l)	11/05/24	J		
251. Cameco Corp. (CCJ)	A	Dividend	J	T	Buy	06/20/24	J		
252. Camtek Ltd. (CAMT)	A	Dividend	J	T	Buy	03/22/24	J		
253. Canadian National Railway Co. (CNI)	A	Dividend	J	T	Buy	03/22/24	J		
254. Canadian Pacific Kansas City Ltd. (CP)	A	Dividend	J	T	Buy	03/22/24	J		
255.					Buy (add'l)	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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256.					Buy (add'l)	12/12/24	J		
257. Capital One Financial Corp. (COF)	A	Dividend			Buy	03/22/24	J		
258.					Sold	11/11/24	J		
259. Cardinal Health Inc. (CAH)	A	Dividend	J	T	Buy	03/22/24	J		
260. Carrefour SA (CRRFY)	A	Dividend	J	T	Buy	03/22/24	J		
261. Carter's Inc. (CRI)	A	Dividend	J	T	Buy	03/22/24	J		
262. Casella Waste Systems Inc (X)		None	J	T					
263. Casey's General Stores Inc. (CASY)	A	Dividend	J	T	Buy	03/22/24	J		
264. Caterpillar Financial Services Corp. Bonds	A	Interest	J	T	Buy	09/11/24	J		
265. Caterpillar Inc. (CAT)	A	Dividend	J	T	Buy	03/22/24	J		
266.					Buy (add'l)	03/22/24	J		
267.					Sold (part)	09/09/24	J		
268. Cava Group Inc (X)		None	J	T					
269. CBRE Group Inc (X)		None	J	T					
270. CDW Corp. (CDW)		None			Buy	03/22/24	J		
271. Cencora Inc. (COR)	A	Dividend	J	T	Buy	03/22/24	J		
272. Centene Corp. (CNC)		None	J	T	Buy	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
273. CenterPoint Energy Inc. (CNP)	A	Dividend	J	T	Buy	03/22/24	J		
274. Charles Schwab Corp. (SCHW)	A	Dividend	J	T	Buy	03/22/24	J		
275. Check Point Software Technologies Ltd. (CHKP)		None	J	T	Sold	10/25/24	J		
276. Chemours Co. (CC)	A	Distribution	J	T	Buy	03/22/24	J		
277. Cheniere Energy Inc. (LNG)		None			Buy	03/22/24	J		
278. Chevron Corp. (CVX)	A	Dividend			Buy	03/22/24	J		
279.					Sold	06/28/24	J		
280. Chubb Ltd. (CB)	A	Dividend	J	T	Buy	03/22/24	J		
281. Church & Dwight Co. Inc. (CHD)	A	Dividend	J	T	Buy	07/30/24	J		
282. Cie de Saint Gobain SA (CODYY)	A	Dividend	J	T	Buy	04/30/24	J		
283.					Buy (add'l)	06/20/24	J		
284. Cie Financiere Richemont SA (CFRUY)		None			Buy	03/22/24	J		
285. Cinemark Holdings Inc.		None	J	T	Buy	03/22/24	J		
286.					Sold (part)	08/14/24	J		
287.					Sold (part)	09/25/24	J		
288. Cisco Systems Inc. (CSCO)	A	Dividend	J	T	Buy	03/22/24	J		
289. Citigroup Inc. (C)	A	Dividend	J	T	Buy	03/22/24	J		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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290.					Buy (add'l)	03/22/24	J		
291.					Sold (part)	08/06/24	J		
292. Citigroup Inc.Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
293. Clean Harbors Inc. (CLH)		None	J	T	Buy	03/22/24	J		
294. Clearwater Analytics Holdings Inc (X)		None	J	T					
295. Cleveland-Cliffs Inc. (CLF)		None	J	T	Buy	09/13/24	J		
296.					Buy (add'l)	09/16/24	J		
297. CNO Financial Group Inc. (CNO)	A	Dividend	J	T	Buy	03/22/24	J		
298. CNX Resources Corp. (CNX)		None	J	T	Buy	03/22/24	J		
299. Coca-Cola Co. (KO)	A	Dividend	J	T	Buy	03/22/24	J		
300. Coca-Cola Co.Corp. Bonds	A	Interest	K	T	Buy	03/28/24	J		
301.					Buy (add'l)	04/16/24	J		
302. Collegium Pharmacutical Inc. (COLL)		None	J	T	Buy	03/22/24	J		
303. Columbia Banking System Inc. (COLB)	A	Dividend	J	T	Buy	03/22/24	J		
304. Comcast Corp. (CMCSA)	A	Dividend	J	T	Buy	03/22/24	J		
305. Comcast Corp.Bonds	A	Interest	J	T	Buy	03/28/24	J		
306.					Buy (add'l)	08/13/24	J		

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307. Comerica Inc. (CMA)	A	Dividend	J	T	Buy	03/22/24	J		
308.					Buy (add'l)	09/25/24	J		
309. Commerce Bancshares Inc./MO (CBSH) j		None			Buy	03/22/24	J		
310. Commercial Metals Co. (CMC)	A	Dividend	J	T	Buy	03/22/24	J		
311. Compass Group PLC (CMPGY)	A	Dividend	J	T	Buy	03/22/24	J		
312. ConocoPhillips (COP)	A	Dividend	J	T	Buy	03/22/24	J		
313.					Buy (add'l)	03/22/24	J		
314. ConocoPhillips Holding Co. Corp. Bonds	A	Interest	J	T	Buy	04/16/24	J		
315. Constellation Energy Corp. (CEG)	A	Dividend			Buy (add'l)	04/24/24	J		
316.					Sold (part)	09/25/24	J		
317.					Sold (part)	10/15/24	J		
318.					Sold	12/06/24	J		
319. Copart Inc. (CPRT)		None	J	T	Buy	03/22/24	J		
320.					Buy (add'l)	07/30/24	J		
321. Core Scientific Inc. (CORZ)		None	J	T	Buy	11/22/24	J		
322.					Buy (add'l)	12/05/24	J		
323. CoStar Group Inc. (CSGP)		None	J	T	Buy	07/30/24	J		

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324. Costco Wholesale Corp (X)	A	Dividend	J	T					
325. Coupang Inc. (CPNG)	A	Dividend			Buy	09/25/24	J		
326.					Buy (add'l)	10/11/24	J		
327.					Sold	12/09/24	J		
328. Crane Co. (CR)	A	Dividend	J	T	Buy	03/22/24	J		
329. Credo Technology Group Holding Ltd (X)	A	Dividend	J	T					
330. Crescent Point Energy Corp. (B67C970)		None			Buy	03/22/24	J		
331. Cross Country Healthcare Inc. (CCRN)		None	J	T	Buy	03/22/24	J		
332. Crowdstrike Holdings Inc. (CRWD)		None	J	T	Buy	03/22/24	J		
333.					Sold (part)	06/27/24	J		
334. Cummins Inc. (CMI)	A	Dividend	J	T	Buy	03/22/24	J		
335. CVS Health Corp. (CVS)	A	Dividend	J	T	Buy	03/22/24	J		
336.					Buy (add'l)	03/22/24	J		
337. Danaher Corp. (DHR)	A	Dividend	J	T	Buy	03/22/24	J		
338.					Buy (add'l)	03/22/24	J		
339.					Buy (add'l)	05/23/24	J		
340.					Sold (part)	11/07/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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341.					Sold (part)	11/18/24	J		
342. Danone SA (DANOY)	A	Dividend	J	T	Buy	03/22/24	J		
343.					Sold (part)	11/07/24	J		
344. Datadog Inc. (DDOG) (X)		None	J	T	Sold (part)	07/30/24	J		
345. Dave & Buster's Entertainment Inc. (PLAY)		None	J	T	Buy	09/13/24	J		
346. Delek US Holdings Inc. (DK)	A	Dividend	J	T	Buy	03/22/24	J		
347.					Buy (add'l)	09/04/24	J		
348. Dell Technologies Inc. (DELL)	A	Dividend	J	T	Buy	03/22/24	J		
349.					Sold (part)	12/16/24	J		
350. Delta Air Lines Inc. (DAL)	A	Dividend	J	T	Buy	11/21/24	J		
351.					Buy (add'l)	11/22/24	J		
352.					Buy (add'l)	11/27/24	J		
353. Deutsche Telekom AG (DTEGY)	A	Dividend	J	T	Buy	03/22/24	J		
354.					Buy (add'l)	03/22/24	J		
355. Dexcom Inc. (DXCM)		None	J	T	Buy	03/22/24	J		
356. Diageo PLC (DEO)	A	Dividend	J	T	Buy	03/22/24	J		
357. Diamondback Energy (FANG)	A	Dividend	J	T	Buy	03/22/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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McHugh, Carolyn B.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
358.					Sold (part)	05/17/24	J		
359. Dick's Sporting Goods Inc. (DKS)	A	Dividend	J	T	Buy	03/22/24	J		
360. Discover Financial Services (DFS)	A	Dividend	J	T	Buy	03/22/24	J		
361.					Buy (add'l)	03/22/24	J		
362. DoorDash Inc. (DASH)		None			Buy	03/22/24	J		
363. DraftKings Inc. (DKNG)		None	J	T	Buy	03/22/24	J		
364.					Buy (add'l)	08/15/24	J		
365.					Sold (part)	11/07/24	J		
366.					Sold (part)	12/03/24	J		
367. Dream Finders Homes Inc. (DFH)		None	J	T	Buy	03/22/24	J		
368. Eaton Corp PLC (X)	A	Dividend	J	T					
369. eBay Inc. (EBAY)	A	Dividend	J	T	Buy	03/22/24	J		
370. elf Beauty Inc. (ELF)		None			Buy	03/22/24	J		
371. Eli Lilly & Co. (LLY)	A	Dividend	J	T	Buy	03/22/24	J		
372.					Buy (add'l)	03/22/24	J		
373.					Buy (add'l)	10/31/24	J		
374.					Buy (add'l)	12/20/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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375. Encompass Health Corp. (EHC)	A	Dividend	J	T	Buy	03/22/24	J		
376. Enel SpA (ENLAY)	A	Dividend	J	T	Buy	03/22/24	J		
377. Ensign Group Inc. (ENSG)	A	Dividend	J	T	Buy	03/22/24	J		
378. Entegris Inc. (ENTG) (X)	A	Dividend			Sold	07/30/24	J		
379. Entergy Corp Domestic Equity (X)	A	Dividend	J	T					
380. EPAM Systems INC (X)		None	J	T					
381. Equinix inc. (EQIX) (X)	A	Dividend			Sold	12/23/24	J		
382. Estee Lauder Co. Inc. (EL)		None			Buy	03/22/24	J		
383. Exelixis Inc (X)		None	J	T					
384. ExlService Holdings Inc (X)		None	J	T					
385. Exxon Mobil Corp. (XOM)	A	Dividend	J	T	Buy	03/22/24	J		
386.					Buy (add'l)	06/28/24	J		
387. F5 Inc (X)		None	J	T					
388. Fair Issac Corp. (FICO)		None	J	T	Buy	06/26/24	J		
389. FANUC Corp. (FANUY)	A	Dividend	J	T	Buy	03/22/24	J		
390. Federal Signal Corp. (FSS)	A	Dividend	J	T	Buy	03/22/24	J		
391. FedEx Corp. (FDX)	A	Dividend	J	T	Buy	03/22/24	J		

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392. Ferrari NV (RACE)	A	Dividend	J	T	Buy	03/22/24	J		
393.					Buy (add'l)	03/22/24	J		
394.					Sold (part)	10/09/24	J		
395. Fifth Third Bancorp (FITB)	A	Dividend	J	T	Buy	03/22/24	J		
396. First Commonwealth Financial Corp. (FCF)	A	Dividend	J	T	Buy	03/22/24	J		
397. FirstCash Inc. (FCFS)		None			Buy	03/22/24	J		
398. First Financial Bankshares Inc (X)	A	Dividend	J	T					
399. First Horizon Corp (X)	A	Dividend	J	T					
400. Fiserv Inc. (FI)		None	J	T	Buy	06/27/24	J		
401.					Buy (add'l)	07/30/24	J		
402.					Sold (part)	08/06/24	J		
403. Flagstar Financial Inc (X)	A	Dividend	J	T					
404. Flex Ltd. (FLEX)		None	J	T	Buy	03/22/24	J		
405. FMC Corp. (FMC)	A	Dividend	J	T	Buy	03/22/24	J		
406. FNB Corp./PA (FNB)	A	Dividend	J	T	Buy	03/22/24	J		
407. Ford Motor Co (X)	A	Dividend	J	T					
408. Fox Corp (X)	A	Dividend	J	T					

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409. Freeport-McMoRan Inc. (FCX)		None			Buy	03/22/24	J		
410.					Sold (part)	05/10/24	J		
411.					Buy (add'l)	05/23/24	J		
412. FTAI Aviation Ltd. (FTAI)	A	Dividend	J	T	Buy	03/22/24	J		
413. Fujitsu Ltd. (FJTSY)	A	Dividend	J	T	Buy	04/24/24	J		
414. Gartner Inc. (IT)	A	Dividend	J	T	Buy	07/30/24	J		
415. General Motors Co. (GM)	A	Dividend	J	T	Buy	03/22/24	J		
416. General Motors Financial Co. Inc. Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
417. Genpact Ltd (X)	A	Dividend	J	T					
418. GFL Environmental Inc. (GFL)	A	Dividend	J	T	Buy	03/22/24	J		
419.					Buy (add'l)	08/06/24	J		
420.					Buy (add'l)	09/19/24	J		
421.					Buy (add'l)	10/07/24	J		
422.					Sold (part)	11/27/24	J		
423.					Buy (add'l)	12/23/24	J		
424. Gilead Sciences Inc. (GILD)	A	Dividend	J	T	Buy	03/22/24	J		
425. Gilead Sciences Inc. Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		

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426. Global Payments Inc. (GPN)	A	Dividend	J	T	Buy	03/22/24	J		
427.					Buy (add'l)	07/30/24	J		
428. Global e-Online Ltd. (GLBE)		None	J	T	Buy	09/19/24	J		
429.					Buy (add'l)	10/22/24	J		
430.					Buy (add'l)	11/21/24	J		
431. Goldman Sachs Group Inc. (GS)	A	Dividend	J	T	Buy	03/22/24	J		
432.					Buy (add'l)	03/22/24	J		
433.					Buy (add'l)	11/07/24	J		
434. SEI Government Fund (AABXX)	A	Dividend			Buy	03/21/24	P1		
435.					Sold (part)	03/22/24	J		
436.					Sold (part)	03/26/24	M		
437.					Sold (part)	03/26/24	M		
438.					Sold (part)	03/26/24	M		
439.					Sold (part)	03/26/24	L		
440.					Sold (part)	03/26/24	L		
441.					Sold (part)	03/26/24	L		
442.					Sold (part)	03/26/24	L		

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443.					Sold (part)	03/26/24	L		
444.					Sold (part)	03/26/24	M		
445.					Sold (part)	03/26/24	M		
446.					Sold (part)	03/27/24	J		
447.					Sold (part)	04/02/24	M		
448.					Sold (part)	04/03/24	N		
449.					Buy (add'l)	04/04/24	J		
450.					Sold (part)	04/15/24	J		
451.					Sold (part)	04/15/24	J		
452.					Sold (part)	04/17/24	M		
453.					Sold (part)	04/17/24	J		
454.					Sold (part)	04/18/24	M		
455.					Sold (part)	04/29/24	K		
456.					Sold (part)	05/02/24	J		
457.					Buy (add'l)	05/07/24	J		
458.					Buy (add'l)	05/21/24	J		
459.					Sold (part)	05/23/24	J		

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460.					Sold (part)	05/28/24	J		
461.					Buy (add'l)	06/03/24	J		
462.					Buy (add'l)	06/04/24	J		
463.					Buy (add'l)	06/06/24	J		
464.					Buy (add'l)	06/07/24	J		
465.					Sold (part)	06/12/24	J		
466.					Buy (add'l)	06/25/24	J		
467.					Buy (add'l)	06/25/24	J		
468.					Sold (part)	06/27/24	J		
469.					Sold (part)	06/27/24	J		
470.					Buy (add'l)	06/28/24	J		
471.					Buy (add'l)	07/02/24	J		
472.					Buy (add'l)	07/02/24	J		
473.					Buy (add'l)	07/10/24	J		
474.					Sold (part)	07/15/24	J		
475.					Sold (part)	07/16/24	J		
476.					Sold (part)	07/18/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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477.					Buy (add'l)	07/25/24	J		
478.					Buy (add'l)	07/26/24	J		
479.					Buy (add'l)	07/29/24	J		
480.					Sold (part)	07/30/24	J		
481.					Sold (part)	08/08/24	J		
482.					Buy (add'l)	08/08/24	J		
483.					Sold (part)	08/12/24	J		
484.					Sold (part)	08/14/24	J		
485.					Buy (add'l)	08/15/24	J		
486.					Sold (part)	08/16/24	J		
487.					Sold (part)	08/23/24	J		
488.					Sold (part)	08/30/24	J		
489.					Sold (part)	09/05/24	J		
490.					Buy (add'l)	09/11/24	J		
491.					Sold (part)	09/12/24	J		
492.					Buy (add'l)	09/12/24	J		
493.					Buy (add'l)	09/18/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000

3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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McHugh, Carolyn B.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
494.					Sold (part)	09/20/24	J		
495.					Sold (part)	09/23/24	J		
496.					Buy (add'l)	09/23/24	J		
497.					Sold (part)	09/26/24	J		
498.					Sold (part)	09/26/24	J		
499.					Sold (part)	09/30/24	J		
500.					Sold (part)	09/30/24	J		
501.					Sold (part)	09/30/24	J		
502.					Sold (part)	09/30/24	J		
503.					Sold (part)	09/30/24	J		
504.					Sold (part)	09/30/24	J		
505.					Sold	09/30/24	J		
506. SEI Government II Fund (TCGXX)	A	Dividend	K	T	Buy	09/30/24	J		
507.					Buy (add'l)	09/30/24	J		
508.					Buy (add'l)	09/30/24	J		
509.					Buy (add'l)	09/30/24	J		
510.					Buy (add'l)	09/30/24	J		

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less
B =$1,001 - $2,500
C =$2,501 - $5,000
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F =$50,001 - $100,000
G =$100,001 - $1,000,000
H1 =$1,000,001 - $5,000,000
H2 =More than $5,000,000

2. Value Codes (See Columns C1 and D3)
J =$15,000 or less
K =$15,001 - $50,000
L =$50,001 - $100,000
M =$100,001 - $250,000
N =$250,001 - $500,000
O =$500,001 - $1,000,000
P1 =$1,000,001 - $5,000,000
P2 =$5,000,001 - $25,000,000
P3 =$25,000,001 - $50,000,000
P4 =More than $50,000,000

3. Value Method Codes (See Column C2)
Q =Appraisal
R =Cost (Real Estate Only)
S =Assessment
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Name of Person Reporting	Date of Report
McHugh, Carolyn B.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
511.					Buy (add'l)	09/30/24	J		
512.					Buy (add'l)	09/30/24	J		
513.					Buy (add'l)	10/07/24	J		
514.					Buy (add'l)	10/08/24	J		
515.					Buy (add'l)	10/09/24	J		
516.					Buy (add'l)	10/10/24	J		
517.					Sold (part)	10/15/24	J		
518.					Buy (add'l)	10/15/24	J		
519.					Buy (add'l)	10/16/24	J		
520.					Buy (add'l)	10/18/24	J		
521.					Sold (part)	10/21/24	J		
522.					Sold (part)	10/21/24	J		
523.					Sold (part)	10/28/24	J		
524.					Sold (part)	10/30/24	J		
525.					Buy (add'l)	11/01/24	J		
526.					Sold (part)	11/04/24	J		
527.					Buy (add'l)	11/04/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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McHugh, Carolyn B.	08/13/2025

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
528.					Sold (part)	11/06/24	J		
529.					Buy (add'l)	11/06/24	J		
530.					Sold (part)	11/08/24	J		
531.					Sold (part)	11/08/24	J		
532.					Sold (part)	11/12/24	J		
533.					Sold (part)	11/12/24	J		
534.					Buy (add'l)	11/12/24	J		
535.					Buy (add'l)	11/12/24	J		
536.					Buy (add'l)	11/13/24	J		
537.					Buy (add'l)	11/13/24	J		
538.					Buy (add'l)	11/15/24	J		
539.					Buy (add'l)	11/18/24	J		
540.					Buy (add'l)	11/19/24	J		
541.					Buy (add'l)	11/20/24	J		
542.					Sold (part)	11/21/24	J		
543.					Sold (part)	11/22/24	J		
544.					Sold (part)	11/25/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
545.					Sold (part)	11/25/24	J		
546.					Sold (part)	11/26/24	J		
547.					Sold (part)	11/26/24	J		
548.					Buy (add'l)	12/03/24	J		
549.					Sold (part)	12/06/24	J		
550.					Buy (add'l)	12/09/24	J		
551.					Sold (part)	12/10/24	J		
552.					Buy (add'l)	12/13/24	J		
553.					Buy (add'l)	12/19/24	J		
554.					Sold (part)	12/20/24	J		
555.					Sold (part)	12/23/24	J		
556.					Buy (add'l)	12/24/24	J		
557.					Sold (part)	12/27/24	J		
558. GSK PLC (GSK)	A	Dividend	J	T	Buy	03/22/24	J		
559. Haliburton Co. (HAL)	A	Dividend	J	T	Buy	06/21/24	J		
560. Hamilton Lane Inc. (HLNE)	A	Dividend	J	T	Buy	03/22/24	J		
561. Hartford Insurance Group Inc. (HIG)	A	Dividend	J	T	Buy	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
562. HCA Healthcare Inc. (HCA)	A	Dividend	J	T	Buy	03/22/24	J		
563. HEICO Corp. (HEI/A)	A	Dividend	J	T	Buy	03/22/24	J		
564.					Buy (add'l)	03/22/24	J		
565.					Buy (add'l)	03/22/24	J		
566.					Buy (add'l)	07/30/24	J		
567. Heidelberg Materials AG (B5T6K25)		None	J	T	Buy	12/03/24	J		
568. Heineken NV (HEINY)	A	Dividend	J	T	Buy	03/22/24	J		
569.					Buy (add'l)	03/22/24	J		
570.					Sold (part)	07/17/24	J		
571. Hermes International SCA (HESAY)	A	Dividend	J	T	Buy	03/22/24	J		
572. Hewlett Packard Enterprise Co. (HPE)	A	Dividend	J	T	Buy	03/22/24	J		
573. HF Sinclair Corp. (DINO)	A	Dividend	J	T	Buy	03/22/24	J		
574. Highwoods Properties Inc. (HIW)	A	Dividend	J	T	Buy	03/22/24	J		
575. Hilton Worldwide Holdings Inc. (HLT)	A	Dividend			Buy	03/22/24	J		
576.					Sold	07/30/24	J		
577. Home Depot Inc. (HD)	A	Dividend	J	T	Buy	03/22/24	J		
578.					Buy (add'l)	03/22/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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579. Honeywell International Inc. (HON)	A	Dividend	J	T	Buy	03/22/24	J		
580.					Sold (part)	12/02/24	J		
581. Host Hotels & Resorts Inc (X)	A	Dividend	J	T					
582. HP Inc. (HPQ)	A	Dividend	J	T	Buy	03/22/24	J		
583. HubSpot Inc. (HUBS)		None	J	T	Buy	03/22/24	J		
584.					Buy (add'l)	06/27/24	J		
585. Humana Inc. (HUM) (X)	A	Dividend	J	T	Sold (part)	06/12/24	J		
586. Iberdrola SA (IBDRY)	A	Dividend			Buy	03/22/24	J		
587.					Sold	07/12/24	J		
588. IDEX Corp. (IEX)	A	Dividend	J	T	Buy	07/30/24	J		
589. IDEXX Labratories Inc. (IDXX)		None	J	T	Buy	07/30/24	J		
590. Incyte Corp(X)		None	J	T					
591. Industria de Diseno Textil SA (IDEXY)	A	Dividend	J	T	Buy	10/08/24	J		
592. Infineon Technologies AG (IFNNY)	A	Dividend	J	T	Buy	03/22/24	J		
593.					Buy (add'l)	03/22/24	J		
594. ING Group NV (ING)	A	Dividend	J	T	Buy	03/22/24	J		
595. Ingredion Inc (X)	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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596. Inmode Ltd. (INMD)	A	Dividend			Buy	03/22/24	J		
597.					Sold	10/07/24	J		
598. Installed Building Products Inc. (IBP)		None			Buy	03/22/24	J		
599. Integra LifeSciences Holdings Corp. (IART)	A	Dividend			Buy	03/22/24	J		
600.					Sold	10/04/24	J		
601. Intel Corp. (INTC)		None	J	T	Buy	03/22/24	J		
602.					Buy (add'l)	12/02/24	J		
603. Intercontinental Exchange Inc. (ICE)	A	Dividend	J	T	Buy	03/22/24	J		
604.					Buy (add'l)	07/30/24	J		
605. International Business Machines Corp. (IBM)	A	Dividend	J	T	Buy	03/22/24	J		
606.					Buy (add'l)	03/22/24	J		
607.					Sold (part)	03/26/24	J		
608. Intesa Sanpaolo SpA (ISNPY)	A	Dividend	J	T	Buy	03/22/24	J		
609.					Sold (part)	04/30/24	J		
610. Intuit Inc. (INTU)	A	Dividend	J	T	Buy	03/22/24	J		
611.					Sold (part)	04/24/24	J		
612.					Buy (add'l)	07/30/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
613. IQVIA Holdings Inc. (IQV)		None	J	T	Buy	03/22/24	J		
614.					Buy (add'l)	03/22/24	J		
615. ITT Inc. (ITT)	A	Dividend			Buy	03/22/24	J		
616.					Sold	07/30/24	J		
617. Jabil Inc. (JBL)	A	Dividend	J	T	Buy	03/22/24	J		
618. Jackson Financial Inc. (JXN)	A	Dividend	J	T	Buy	03/22/24	J		
619. Jacobs Solutions Inc. (J)	A	Dividend	J	T	Buy	10/25/24	J		
620. Johnson & Johnson (JNJ)	A	Dividend	J	T	Buy	03/22/24	J		
621.					Buy (add'l)	03/22/24	J		
622.					Buy (add'l)	06/21/24	J		
623.					Sold (part)	10/14/24	J		
624.					Sold (part)	10/31/24	J		
625. JPMorgan Chase & Co. (JPM)	A	Dividend	J	T	Buy	03/22/24	J		
626. Julius Baer Group Ltd. (JBAXY)	A	Dividend	J	T	Buy	03/22/24	J		
627.					Buy (add'l)	05/16/24	J		
628. KE Holdings Inc. (BEKE)	A	Dividend	J	T	Buy	10/04/24	J		
629. Kellanova Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
3. Value Method Codes (See Column C2) — Q =Appraisal; R =Cost (Real Estate Only); S =Assessment; T =Cash Market; U =Book Value; V =Other; W =Estimated

VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	 (2) Date mm/dd/yy	 (3) Value Code 2 (J-P)	 (4) Gain Code 1 (A-H)	
630. Kering SA (PPRUY)	A	Dividend	J	T	Buy	03/22/24	J		
631.					Buy (add'l)	08/29/24	J		
632. KeyCorp (KEY)	A	Dividend			Buy	03/22/24	J		
633.					Sold	09/16/24	J	A	
634. Keysight Technologies Inc. (KEYS)		None	J	T	Buy	07/30/24	J		
635. Kingfisher PLC (KGFHY)	A	Dividend	J	T	Buy	03/22/24	J		
636. Kinsale Capital Group Inc. (KNSL)	A	Dividend	J	T	Buy	03/22/24	J		
637. Kirby Corp (X)		None	J	T					
638. KKR & Co. Inc. (KKR)	A	Dividend			Buy	03/22/24	J		
639.					Sold	07/30/24	J		
640. Koninklijke Philips NV (PHG)		None	J	T	Buy	03/22/24	J		
641. Kraft Heinz Co. (KHC)	A	Dividend	J	T	Buy	03/22/24	J		
642. Kroger Co. (KR)	A	Dividend	J	T	Buy	03/22/24	J		
643. Labcorp Holdings Inc. (LH)	A	Dividend	J	T	Buy	03/22/24	J		
644. Lantheus Holdings Inc		None	J	T					
645. Lasertec Corp. (LSRCY)	A	Dividend			Buy	03/22/24	J		
646.					Sold	07/01/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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647. Legal & General Group PLC (LGGNY)	A	Dividend	J	T	Buy	03/22/24	J		
648. Leidos Holdings Inc. (LDOS)	A	Dividend	J	T	Buy	03/22/24	J		
649. Lennar Corp. (LEN)	A	Dividend	J	T	Buy	03/22/24	J		
650. Liberty Media Corp - Liberty Formula One (FWONK)		None	J	T	Buy	03/22/24	J		
651. Lincoln National Corp. (LNC)	A	Dividend	J	T	Buy	03/22/24	J		
652. LKQ Corp. (LKQ)	A	Dividend	J	T	Buy	03/22/24	J		
653. Lockheed Martin Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
654. L'Oreal SA (LRLCY)		None			Buy	03/22/24	J		
655. LVMH Moet Hennessy Louis Vuitton SE (LVMUY)	A	Dividend	J	T	Buy	03/22/24	J		
656.					Buy (add'l)	03/28/24	J		
657. M&T Bank Corp. (MTB) (X)	A	Dividend			Sold	12/11/24	J		
658. Marathon Oil (MRO)		None			Buy	03/22/24	J		
659. Marathon Petroleum Corp. (MPC)	A	Dividend	J	T	Buy	03/22/24	J		
660. Maarsh & McLennan COS Inc. (MMC)	A	Dividend	J	T	Buy	03/22/24	J		
661. Martin Marietta Materials Inc. (MLM)	A	Dividend			Buy	03/22/24	J		
662.					Sold (part)	04/24/24	J		
663.					Sold (part)	10/07/24	J		

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664.					Buy (add'l)	12/03/24	J		
665.					Sold	12/23/24	J		
666. Marvell Technology Inc. (MRVL)	A	Dividend	J	T	Buy	03/22/24	J		
667.					Buy (add'l)	03/22/24	J		
668.					Sold (part)	09/03/24	J		
669.					Buy (add'l)	10/18/24	J		
670. Mastercard Inc. (MA)	A	Dividend	J	T	Buy	03/22/24	J		
671.					Buy (add'l)	03/22/24	J		
672. Mastercard Inc. Corp. Bonds	A	Interest	J	T	Buy	04/16/24	J		
673. Matador Resources Co (X)	A	Dividend	J	T					
674. McDonald's Corp. (MCD)	A	Dividend	J	T	Buy	03/22/24	J		
675. McKesson Corp. (MCK)	A	Dividend	J	T	Buy	03/22/24	J		
676.					Buy (add'l)	03/22/24	J		
677.					Sold (part)	08/09/24	J		
678.					Sold (part)	09/11/24	J		
679. Medtronic PLC (MDT)	A	Dividend	J	T	Buy	03/22/24	J		
680. MercadoLibre Inc. (MELI)		None	J	T	Buy	03/22/24	J		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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681.					Buy (add'l)	03/22/24	J		
682.					Sold (part)	12/06/24	J		
683. Merck & Co. Inc. (MRK)	A	Dividend	J	T	Buy	03/22/24	J		
684.					Buy (add'l)	10/31/24	J		
685. Merit Medical Systems Inc (X)		None	J	T					
686. Meta Platforms Inc. (META)	A	Dividend	K	T	Buy	03/22/24	J		
687.					Buy (add'l)	03/22/24	J		
688.					Buy (add'l)	03/22/24	J		
689.					Sold (part)	12/16/24	J		
690. MetLife Inc.	A	Dividend	J	T	Buy	03/22/24	J		
691. Metlife Inc. Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
692.					Buy (add'l)	11/05/24	J		
693. MGIC Investment Corp (X)	A	Dividend	J	T					
694. Micron Technology Inc. (MU)	A	Dividend			Buy	03/22/24	J		
695.					Buy (add'l)	06/11/24	J		
696.					Sold (part)	06/27/24	J	A	
697.					Sold	10/11/24	J	A	

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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698. Microsoft Corp. (MSFT)	A	Dividend	L	T	Buy	03/22/24	K		
699.					Buy (add'l)	03/22/24	K		
700.					Buy (add'l)	03/22/24	J		
701.					Sold (part)	10/14/24	J		
702.					Sold (part)	12/03/24	J		
703. Microsoft Corp. Bonds	A	Interest	J	T	Buy	04/16/24	J		
704. Mobileye Global Inc. (MBLY)	A	Dividend			Buy	03/22/24	J		
705.					Sold	06/17/24	J		
706. Modine Manufacturing Co. (MOD)		None	J	T	Buy	03/22/24	J		
707.					Buy (add'l)	03/22/24	J		
708. Moelis & Co (X)	A	Dividend	J	T					
709. Molson Coors Beverage Co. (TAP)	A	Dividend	J	T	Buy	03/22/24	J		
710. Mondelez International Inc. (MDLZ)	A	Dividend	J	T	Buy	03/22/24	J		
711. MongoDB Inc. (MDB)		None			Buy	03/22/24	J		
712.					Buy (add'l)	03/22/24	J		
713. Monolithic Power Systems Inc (X)		None	J	T					
714. MTU Aero Engines AG (MTUAY)	A	Dividend			Buy	03/22/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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715.					Sold	08/16/24	J		
716. Mueller Industries Inc (X)	A	Dividend	J	T					
717. Murata Manufacturing Co. Ltd. (MRAAY)	A	Dividend	J	T	Buy	03/22/24	J		
718. Nasdaq Inc. Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
719. Natera Inc. (NTRA)		None	J	T	Buy	03/22/24	J		
720.					Buy (add'l)	03/22/24	J		
721.					Sold (part)	07/30/24	J		
722.					Sold (part)	08/27/24	J		
723.					Sold (part)	09/20/24	J		
724. NatWest Group PLC (NWG)	A	Dividend	J	T	Buy	03/22/24	J		
725. Nebius Group NV (NBIS)		None	J	T	Buy	12/13/24	J		
726.					Buy (add'l)	12/19/24	J		
727.					Buy (add'l)	12/27/24	J		
728. Netflix Inc. (NFLX)		None	J	T	Buy	03/22/24	J		
729.					Buy (add'l)	03/22/24	J		
730.					Sold (part)	08/06/24	J		
731.					Buy (add'l)	11/21/24	J		

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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
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732. Nike Inc. (NKE)	A	Dividend			Buy	03/22/24	J		
733.					Sold	12/02/24	J		
734. Nintendo Co. Ltd. (NTDOY)	A	Dividend	J	T	Buy	04/30/24	J		
735.					Buy (add'l)	11/07/24	J		
736. NiSource Inc (X)	A	Dividend	J	T					
737. Nordson Corp (NDSN)	A	Dividend	J	T	Buy	03/22/24	J		
738. Norfolk Southern Corp. (NSC)	A	Dividend	J	T	Buy	03/22/24	J		
739. Northern Oil & Gas Inc. (NOG)	A	Dividend	J	T	Buy	10/03/24	J		
740. Northrop Grumman Corp. Bonds	A	Interest	K	T	Buy	03/28/24	J		
741.					Buy (add'l)	04/16/24	J		
742. Nova Ltd. (NVMI)		None	J	T	Buy	03/22/24	J		
743. Novanta Inc (X)		None	J	T					
744. Novartis AG (NVS)		None			Buy	03/22/24	J		
745. Novo Nordisk A/S (NVO)	A	Dividend	J	T	Buy	03/22/24	J		
746.					Buy (add'l)	03/22/24	J		
747. NRG Energy Inc. (NRG)	A	Dividend	J	T	Buy	03/22/24	J		
748. NU Holdings Ltd. (NU)		None	J	T	Buy	03/22/24	J		

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2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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749. NVIDIA Corp. (NVDA)	A	Dividend	K	T	Buy	03/22/24	K		
750.					Buy (add'l)	03/22/24	J		
751.					Sold (part)	06/20/24	J		
752. Old Dominion Freight Line Inc. (ODFL)	A	Dividend	J	T	Buy	05/21/24	J		
753.					Buy (add'l)	07/30/24	J		
754. Old National Bancorp/IN (ONB)	A	Dividend	J	T	Buy	03/22/24	J		
755. Open Text Corp. (OTEX)	A	Dividend	J	T	Buy	05/13/24	J		
756. Oracle Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
757. O'Reilly Automotive Inc. (ORLY)		None	J	T	Buy	07/30/24	J		
758. Oscar Health Inc. (OSCR)		None			Buy	06/11/24	J		
759. Otis Worldwide Corp (OTIS)	A	Dividend	J	T	Buy	11/20/24	J		
760. Owens Corning (OC)	A	Dividend	J	T	Buy	03/22/24	J		
761. Palo Alto Networks Inc. (PANW)		None	J	T	Buy	09/04/24	J		
762. Parsons Corp. (PSN)	A	Dividend	J	T	Buy	03/22/24	J		
763. PepsiCo Inc. Corp. Bonds	A	Interest	J	T	Buy	04/16/24	J		
764. Pfizer Inc. (PFE)	A	Dividend	J	T	Buy	03/22/24	J		
765. Phillips 66 (PSX)	A	Dividend	J	T	Buy	03/22/24	J		

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766. Photronics Inc. (PLAB)		None	J	T	Buy	03/22/24	J		
767. Pilgrim's Pride Corp. (PPC)		None	J	T	Buy	03/22/24	J		
768.					Sold (part)	09/13/24	J		
769.					Sold (part)	09/16/24	J		
770. Pinterest Inc. (PINS)	A	Dividend			Buy	03/22/24	J		
771.					Buy (add'l)	10/07/24	J		
772.					Sold (part)	11/05/24	J		
773.					Sold	12/18/24	J		
774. Pioneer Natural Resources Co. (PXD)		None			Buy	03/22/24	J		
775. Piper Sandler Cos (X)	A	Dividend	J	T					
776. Pool Corp. (POOL)	A	Dividend	J	T	Buy	07/30/24	J		
777. Procter & Gamble Co. (PG)	A	Dividend	J	T	Buy	03/22/24	J		
778. Prologis Inc. (PLD)	A	Dividend	J	T	Buy	03/22/24	J		
779. PROS Holdings Inc. (PRO)		None			Buy	03/22/24	J		
780. Prudential PLC (PUK)	A	Dividend	J	T	Buy	03/22/24	J		
781. PulteGroup Inc. (PHM)	A	Dividend	J	T	Buy	03/22/24	J		
782. PVH Corp. (PVH)	A	Dividend	J	T	Buy	03/22/24	J		

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783. Q2 Holdings Inc (X)		None	J	T					
784. Qorvo Inc. (QRVO)		None	J	T	Buy	03/22/24	J		
785. Qualcomm Inc. (QCOM)	A	Dividend	J	T	Buy	03/22/24	J		
786.					Buy (add'l)	12/11/24	J		
787. Quanta Services Inc. (PWR)	A	Dividend			Buy	03/22/24	J		
788.					Sold	07/30/24	J		
789. RadNet Inc (X)		None	J	T					
790. Rambus Inc. (RMBS)		None			Buy	03/22/24	J		
791. RBC Bearings Inc (X)		None	J	T					
792. Reckitt Benckiser Group PLC (RBGLY)	A	Dividend	J	T	Buy	03/22/24	J		
793.					Buy (add'l)	03/22/24	J		
794. Recruit Holdings Co Ltd (X)	A	Dividend	J	T					
795. Reddit Inc (X)		None	J	T					
796. Regal Rexnord Corp. (RRX)	A	Dividend	J	T	Buy	03/22/24	J		
797. Regions Financial Corp. (RF)	A	Dividend	J	T	Buy	03/22/24	J		
798. Reinsurance Group of America Inc (X)	A	Dividend	J	T					
799. RELX PLC (RELX)	A	Dividend	J	T	Buy	03/22/24	J		

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800.					Buy (add'l)	03/22/24	J		
801. Remy Cointreau SA (REMYY)		None			Buy	03/22/24	J		
802. Renesas Electronics Corp. (RNECY)	A	Dividend	J	T	Buy	04/04/24	J		
803.					Buy	04/15/24	J		
804.					Buy	06/03/24	J		
805. Repligen Corp. (RGEN)		None	J	T	Buy	07/30/24	J		
806. Robinhood Markets Inc. (HOOD)		None	J	T	Buy	12/27/24	J		
807. Roche Holding AG (RHHBY)	A	Dividend	J	T	Buy	03/22/24	J		
808. Rockwell Automation Inc (X)	A	Dividend	J	T					
809. Rollins Inc. (ROL)	A	Dividend	J	T	Buy	07/30/24	J		
810. Rolls-Royce Holdings PLC (RYCEY)		None	J	T	Buy	03/22/24	J		
811. Roper Technologies Inc. (ROP)	A	Dividend	J	T	Buy	07/30/24	J		
812. Ross Stores Inc. (ROST)	A	Dividend			Buy	03/22/24	J		
813.					Sold	06/27/24	J		
814. RWE AG (RWEOY)	A	Dividend	J	T	Buy	03/22/24	J		
815. Ryan Specialty Holdings Inc. (RYAN)	A	Dividend	J	T	Buy	07/30/24	J		
816. Ryanair Holdings PLC (RYAAY)	A	Dividend			Buy	03/22/24	J		

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817.					Sold	08/07/24	J		
818. Ryder System Inc. (R)	A	Dividend	J	T	Buy	03/22/24	J		
819. S&P Global Inc. (SPGI)	A	Dividend	J	T	Buy	03/22/24	J		
820. Salesforce Inc. (CRM)	A	Dividend			Buy	03/22/24	J		
821.					Sold	09/20/24	J		
822. Sanofi SA (SNY)	A	Dividend	J	T	Buy	03/22/24	J		
823. SAP SE (SAP)	A	Dividend	J	T	Buy	03/22/24	J		
824. Schneider Electric SE (SBGSY)	A	Dividend	J	T	Buy	03/22/24	J		
825. Sea Ltd. (SE)		None	J	T	Buy	12/03/24	J		
826. Sensata Technologies Holding PLC (ST)	A	Dividend	J	T	Buy	03/22/24	J		
827. ServiceNow Inc. (NOW)		None	J	T	Buy	03/22/24	J		
828.					Buy (add'l)	03/22/24	J		
829. Seven & i Holdings Co. Ltd. (SVNDY)	A	Dividend			Buy	03/22/24	J		
830.					Sold	11/19/24	J		
831. Shell PLC (SHEL)	A	Dividend			Buy	03/22/24	J		
832.					Buy (add'l)	04/24/24	J		
833.					Sold (part)	08/29/24	J		

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834.					Sold	09/26/24	J		
835. Silicon Motion Tehcnology Corp. (SIMO)	A	Dividend	J	T	Buy	03/22/24	J		
836.					Sold (part)	07/02/24	J		
837. Simpson Manufacturing Co. Inc. (SSD)		None			Buy	03/22/24	J		
838. SMC Corp. (SMCAY)	A	Dividend	J	T	Buy	08/07/24	J		
839.					Buy (add'l)	09/26/24	J		
840. Smith & Nephew PLC (SNN)	A	Dividend			Buy	03/22/24	J		
841.					Sold	04/30/24	J		
842. Smurfit WestRock PLC (SW)	A	Dividend	J	T	Buy	08/29/24	J		
843. Snap-on Inc (X)	A	Dividend	J	T					
844. Snowflake Inc. Class A (SNOW)		None	J	T	Buy	03/22/24	J		
845.					Sold	05/20/24	J	A	
846.					Buy	11/27/24	J		
847. Sodexo SA (X)	A	Dividend	J	T					
848. Sony Group Corp. (SONY)	A	Dividend	J	T	Buy	03/22/24	J		
849. Spotify Technology SA (SPOT)		None	J	T	Buy	08/15/24	J		
850.					Buy (add'l)	11/13/24	J		

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851. Sprouts Farmers Market Inc (X)		None	J	T					
852. SPS Commerce Inc. (SPSC)		None	J	T	Buy	03/22/24	J		
853. SPX Technologies Inc Com (X)		None	J	T					
854. Standard Chartered PLC (SCBFY)	A	Dividend	J	T	Buy	03/22/24	J		
855.					Buy (add'l)	05/10/24	J		
856.					Sold (part)	10/18/24	J		
857. Starbucks Corp. Bonds	A	Interest	J	T	Buy	03/28/24	J		
858. Starwood Property Trust Inc (X)	A	Dividend	J	T					
859. State Street Corp (X)	A	Dividend	J	T					
860. Steel Dynamics Inc. (STLD)	A	Dividend	J	T	Buy	03/22/24	J		
861. Steris PLC (STE)	A	Dividend	J	T	Buy	07/30/24	J		
862. Sterling Infrastructure Inc (X)		None	J	T					
863. Stifel Financial Corp. (SF)	A	Dividend	J	T	Buy	03/22/24	J		
864. STMicroelectronics NV (STM)		None			Buy	03/22/24	J		
865. Stryker Corp. (SYK)		None			Buy	03/22/24	J		
866. Super Micro Computer Inc. (B1VQR35)		None			Buy	03/22/24	J		
867. Synchrony Financial (X)	A	Dividend	J	T					

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
868. Sysco Corp. (SYY)	A	Dividend			Buy	03/22/24	J		
869.					Sold	12/02/24	J		
870. Taiwan Semiconductor Manufacturing Co. Ltd. (TSM)	A	Dividend	K	T	Buy	03/22/24	J		
871.					Buy (add'l)	03/22/24	J		
872.					Buy (add'l)	10/18/24	J		
873.					Buy (add'l)	10/22/24	J		
874.					Buy (add'l)	12/11/24	J		
875.					Buy (add'l)	12/12/24	J		
876. Takeda Pharmacutical Co. Ltd. (TAK)	A	Dividend	J	T	Buy	03/22/24	J		
877. Talen Energy Corp. (TLN)		None	J	T	Buy	09/25/24	J		
878.					Buy (add'l)	11/05/24	J		
879.					Buy (add'l)	11/08/24	J		
880.					Sold (part)	11/15/24	J		
881.					Buy (add'l)	12/06/24	J		
882. Taylor Wimpey PLC (TWODY)	A	Dividend	J	T	Buy	09/20/24	J		
883. TD SYNNEX Corp. (SNX)	A	Dividend	J	T	Buy	12/11/24	J		
884. TechnipFMC Ltd. (FTI) (X)	A	Dividend			Sold	07/30/24	J		

1. Income Gain Codes: (See Columns B1 and D4) A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets). Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
885. Teck Resources Ltd. (TECK)	A	Dividend	J	T	Buy	05/10/24	J		
886. Tencent Holdings Ltd. (TCEHY)	A	Dividend	J	T	Buy	03/22/24	J		
887.					Buy (add'l)	03/22/24	J		
888. Terex Corp. (TEX)	A	Dividend	J	T	Buy	03/22/24	J		
889. Tesla Inc. (TSLA)		None	J	T	Buy	03/22/24	J		
890.					Sold (part)	04/12/24	J		
891.					Sold	06/05/24	J		
892.					Buy	11/07/24	J		
893.					Buy (add'l)	12/26/24	J		
894. Texas Roadhouse Inc. (TXRH)	A	Dividend	J	T	Buy	03/22/24	J		
895. Textron Inc. (TXT)	A	Dividend	J	T	Buy	03/22/24	J		
896. Thermo Fisher Scientific Inc. (TMO)	A	Dividend	J	T	Buy	03/22/24	J		
897.					Buy (add'l)	03/22/24	J		
898.					Sold (part)	10/04/24	J		
899.					Sold (part)	11/19/24	J		
900. Tractor Supply Co. (TSCO)	A	Dividend			Buy	03/22/24	J		
901.					Sold	07/30/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
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902. Trade Desk Inc. (TTD)	A	Dividend			Buy	03/22/24	J		
903.					Buy (add'l)	03/22/24	J		
904.					Sold	07/30/24	J		
905. Trane Technologies PLC (TT)		None			Buy	03/22/24	J		
906. TransDigm Group Inc. (TDG)	A	Dividend			Buy	03/22/24	J		
907.					Sold	11/08/24	J	A	
908. Trex Co. Inc. (TREX)		None	J	T	Buy	11/05/24	J		
909. Tyler Technologies Inc. (TYL)		None	J	T	Buy	07/30/24	J		
910. Tyson Foods Inc. (TSN)	A	Dividend	J	T	Buy	03/22/24	J		
911. Uber Technologies Inc. (UBER)		None	J	T	Buy	03/22/24	J		
912.					Buy (add'l)	10/11/24	J		
913. UniCredit SpA (UNCRY)	A	Dividend	J	T	Buy	07/30/24	J		
914. United Airlines Holdings Inc. (UAL)		None	J	T	Buy	12/03/24	J		
915.					Buy (add'l)	12/11/24	J		
916. United Overseas Bank Ltd. (UOVEY)	A	Dividend	J	T	Buy	03/22/24	J		
917. US Treasury Note/Bond (X)	D	Interest	O	T					
918. United Therapeutics Corp		None	J	T					

1. Income Gain Codes: (See Columns B1 and D4)
A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000

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919. UnitedHealth Group Inc. (UNH)	A	Dividend	J	T	Buy	03/22/24	J		
920.					Buy (add'l)	03/22/24	J		
921.					Sold (part)	04/01/24	J		
922.					Buy (add'l)	06/12/24	J		
923.					Buy (add'l)	07/18/24	J		
924.					Buy (add'l)	10/07/24	J		
925.					Sold (part)	12/11/24	J		
926.					Sold (part)	12/12/24	J		
927. Urban Outfitters Inc. (URBN)		None	J	T	Buy	03/22/24	J		
928. Valero Energy Corp. (VLO)	A	Dividend	J	T	Buy	03/22/24	J		
929. Varonis Systems Inc. (VRNS)		None	J	T	Buy	03/22/24	J		
930. Vaxcyte Inc. (PCVX)	A	Dividend			Buy	03/22/24	J		
931.					Sold	11/18/24	J		
932. Veren Inc Com (X)	A	Dividend	J	T					
933. Verisk Analytics Inc. (VRSK)	A	Dividend	J	T	Buy	07/30/24	J		
934. Verizon Communications Inc. (VZ)	A	Dividend	J	T	Buy	03/22/24	J		
935. Verizon Communications Inc. Corp. Bonds	A	Interest	J	T	Buy	04/16/24	J		

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936. Vertex Inc. (VERX)		None	J	T	Buy	03/22/24	J		
937. Vertex Pharmacuticals (VRTX)		None	J	T	Buy	03/22/24	J		
938.					Sold	12/20/24	J		
939.					Buy	12/20/24	J		
940. Vertiv Holdings Co. (VRT)	A	Dividend	J	T	Buy	03/22/24	J		
941.					Buy (add'l)	06/27/24	J		
942.					Sold (part)	07/30/24	J		
943.					Buy (add'l)	08/27/24	J		
944. Vestas Wind Systems A/S (VWDRY)	A	Dividend			Buy	03/22/24	J		
945.					Sold	04/11/24	J		
946. Vinci SA (VCISY)		None	J	T	Buy	03/22/24	J		
947. Visa Inc. (V)	A	Dividend	J	T	Buy	03/22/24	J		
948.					Buy (add'l)	03/22/24	J		
949. Visa Inc. Corp Bonds	A	Interest	J	T	Buy	03/28/24	J		
950. Vistra Corp. (VST)	A	Dividend	J	T	Buy	03/22/24	J		
951.					Buy	11/22/24	J		
952.					Sold	12/11/24	J		

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953.					Buy (add'l)	12/12/24	J		
954. Vulcan Materials Co. (VMC)	A	Dividend	J	T	Buy	07/30/24	J		
955. Walmart Inc. Corp Bonds	A	Interest	J	T	Buy	03/28/24	J		
956. Walt Disney Co. (DIS)	A	Dividend	J	T	Buy	03/22/24	J		
957.					Buy (add'l)	03/22/24	J		
958.					Sold (part)	05/31/24	J		
959.					Sold (part)	08/09/24	J		
960. Walt Disney Co.Corp. Bonds	A	Interest	J	T	Buy	04/16/24	J		
961. Waste Management Inc. (WM)	A	Dividend	J	T	Buy	03/22/24	J		
962.					Buy (add'l)	10/14/24	J		
963. Watsco Inc. (WSO)	A	Dividend	J	T	Buy	07/30/24	J		
964. Wec Energy Group Inc (X)	A	Dividend	J	T					
965. Wells Fargo & Co. (WFC)	A	Dividend	J	T	Buy	03/22/24	J		
966.					Buy (add'l)	03/22/24	J		
967.					Sold (part)	10/14/24	J		
968. Wells Fargo & Co.Corp Bonds	A	Interest	J	T	Buy	03/22/24	J		
969. WESCO International Inc. (WCC)	A	Dividend	J	T	Buy	03/22/24	J		

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970.					Buy (add'l)	03/22/24	J		
971. Westinghouse Air Brake Technologies Corp. (WAB)	A	Dividend	J	T	Buy	03/22/24	J		
972.					Sold (part)	04/12/24	J		
973. Whirlpool Corp. (WHR)	A	Dividend	J	T	Buy	03/22/24	J		
974.					Buy (add'l)	07/02/24	J		
975. Wingstop Inc. (WING)	A	Dividend	J	T	Buy	03/22/24	J		
976. XP Inc. (XP)	A	Dividend			Buy	03/22/24	J		
977.					Sold	11/12/24	J	A	
978. Ziff Davis Inc. (ZD) (X)	A	Dividend			Sold	10/04/24	J		
979. Zions Bancorp NA (ZION)	A	Dividend	J	T	Buy	03/22/24	J		
980. Zoetis Inc. (ZTS)	A	Dividend	J	T	Buy	03/22/24	J		
981. Account #3 (H)									
982. SEI Institutional Managed Trust Insured Deposit (cash)	A	Interest	K	T					
983. BNY Mellon Dynamic Value Fund	C	Dividend	K	T	Buy	06/28/24	K		
984. SEI Core Fixed Income Fund (TRLVX)	B	Distribution	K	T	Buy (add'l)	02/20/24	J		
985.					Sold (part)	06/28/24	L		
986. DFA Investment Grade Portfolio	B	Dividend	L	T	Buy	06/28/24	L		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
987. DFA US Large Cap Equity Portfolio	A	Dividend	K	T	Buy	06/28/24	K		
988. DFA US Small Cap Growth Portfolio	A	Dividend	J	T	Buy	06/28/24	J		
989. DFA US Small Cap Value Portfolio	A	Dividend	K	T	Buy	06/28/24	K		
990. Dodge & Cox Global Bond Fund	C	Dividend	K	T	Buy	06/28/24	K		
991. SEI Dynamic Asset Allocation Fund (SDYAX)	C	Dividend	K	T	Sold (part)	02/20/24	J		
992. SEI Emerging Mkts Debt Fund (SITEX)	A	Dividend	K	T	Sold (part)	06/28/24	J		
993. SEI Emerging Mkts Equity Fund (SIEMX)	A	Dividend	K	T	Buy (add'l)	02/20/24	J		
994.					Sold (part)	06/28/24	J		
995. SEI Global Managed Vol Fund (SVTAX)	B	Dividend	J	T	Buy (add'l)	02/20/24	J		
996.					Sold (part)	06/28/24	K		
997. SEI High Yield Bond Fund (SHYAX)	B	Dividend	K	T					
998. SEI International Equity Fund (SEITX)	C	Dividend	K	T	Sold (part)	02/20/24	J		
999.					Sold (part)	06/28/24	K		
1000. SEI Large Cap Fund (SLGAX)	D	Dividend	L	T	Sold (part)	02/20/24	J		
1001.					Sold (part)	06/28/24	K		
1002. SEI Large Cap Growth Fund (SELCX)	D	Dividend	K	T	Buy	06/28/24	K		
1003. Madison Mid Cap Fund	A	Dividend	J	T	Buy	06/28/24	J		

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
	F =$50,001 - $100,000	G =$100,001 - $1,000,000	H1 =$1,000,001 - $5,000,000	H2 =More than $5,000,000	
2. Value Codes (See Columns C1 and D3)	J =$15,000 or less	K =$15,001 - $50,000	L =$50,001 - $100,000	M =$100,001 - $250,000	
	N =$250,001 - $500,000	O =$500,001 - $1,000,000	P1 =$1,000,001 - $5,000,000	P2 =$5,000,001 - $25,000,000	
	P3 =$25,000,001 - $50,000,000		P4 =More than $50,000,000		
3. Value Method Codes (See Column C2)	Q =Appraisal	R =Cost (Real Estate Only)	S =Assessment	T =Cash Market	
	U =Book Value	V =Other	W =Estimated		

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VII. INVESTMENTS and TRUSTS *-- income, value, transactions (Includes those of spouse and dependent children; see Guide to Judiciary Policy, Volume 2D, Ch. 3, § 310 Reporting Thresholds for Assets; § 312 Types of Reportable Property; § 315 Interests in Property; § 320 Income; § 325 Purchases, Sales, and Exchanges; § 360 Spouses and Dependent Children; § 365 Trusts, Estates, and Investment Funds.)*

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A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	B. (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	C. (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	D. (2) Date mm/dd/yy	D. (3) Value Code 2 (J-P)	D. (4) Gain Code 1 (A-H)	
1004. Manning & Napier High Yield Bond Series	B	Dividend	K	T	Buy	06/28/24	K		
1005. Matthews Emerging Markets Small Companies Fund	A	Dividend	J	T	Buy	06/28/24	J		
1006. MFS Institutional Trust-MFS International Equity Fund	A	Dividend	L	T	Buy	06/28/24	L		
1007. SEI Mid-Cap Fund (SEMCX)	A	Dividend			Sold	06/28/24	K		
1008. SEI Multi-Asset Accumulation Fund (SAAAX)	A	Dividend	K	T	Sold (part)	02/20/24	K		
1009. SEI Multi-Asset Income Fund (SIOAX)	A	Dividend	J	T	Sold (part)	02/20/24	J		
1010.					Sold (part)	06/28/24	K		
1011. SEI Multi-Asset Inflation Managed Fund (SIFAX)	A	Dividend	K	T	Buy (add'l)	02/20/24	J		
1012. SEI Multi-Strategy Alternative Fund (SMSAX)	A	Dividend	J	T	Sold (part)	02/20/24	J		
1013. PIMCO Income Fund	C	Dividend	K	T	Buy	06/28/24	K		
1014. SEIS&P 500 Index Fund (SSPIX)	A	Dividend			Sold	06/28/24	L		
1015. SEI Short-Duration Govt Fund (TCSGX)	A	Dividend			Sold	06/28/24	J		
1016. SIMT Liquid Alternative Fund Class F	A	Dividend	J	T	Buy	02/20/24	J		
1017. Small Cap Fund (SLLAX)	B	Dividend	K	T	Buy (add'l)	02/20/24	J		
1018.					Sold (part)	06/28/24	K		
1019. Ultra Short Bond Fund (SECPX)	A	Dividend			Sold	06/28/24	J		
1020. U.S. Managed Volatility Fund (SVOAX)	A	Dividend			Sold	06/28/24	K		

1. Income Gain Codes: (See Columns B1 and D4) — A =$1,000 or less; B =$1,001 - $2,500; C =$2,501 - $5,000; D =$5,001 - $15,000; E =$15,001 - $50,000; F =$50,001 - $100,000; G =$100,001 - $1,000,000; H1 =$1,000,001 - $5,000,000; H2 =More than $5,000,000
2. Value Codes (See Columns C1 and D3) — J =$15,000 or less; K =$15,001 - $50,000; L =$50,001 - $100,000; M =$100,001 - $250,000; N =$250,001 - $500,000; O =$500,001 - $1,000,000; P1 =$1,000,001 - $5,000,000; P2 =$5,000,001 - $25,000,000; P3 =$25,000,001 - $50,000,000; P4 =More than $50,000,000
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☐ NONE *(No reportable income, assets, or transactions.)*

A. Description of Assets (including trust assets) Place "(X)" after each asset exempt from prior disclosure	B. Income during reporting period (1) Amount Code 1 (A-H)	 (2) Type (e.g., div., rent, or int.)	C. Gross value at end of reporting period (1) Value Code 2 (J-P)	 (2) Value Method Code 3 (Q-W)	D. Transactions during reporting period (1) Type (e.g., buy, sell, redemption)	 (2) Date mm/dd/yy	 (3) Value Code 2 (J-P)	 (4) Gain Code 1 (A-H)	
1021. Vanguard 500 Index Fund	A	Dividend	K	T	Buy	06/28/24	K		
1022. Account #4 (H)									
1023. J.P Morgan Prine Money Market Fund (cash eq.)	D	Dividend	M	T					
1024. Account #5 (H)									
1025. my529 Target Enrollment 2036/2037 (UTALX)		None	K	T					
1026. Account #6 (H)									
1027. my529 Target Enrollment 2038/2039 (UTAMX)		None	K	T					
1028. Account #7 (H)									
1029. my529 Target Enrollment 2038/2039 (UTAMX)		None	K	T					

1. Income Gain Codes: (See Columns B1 and D4)	A =$1,000 or less	B =$1,001 - $2,500	C =$2,501 - $5,000	D =$5,001 - $15,000	E =$15,001 - $50,000
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VIII. ADDITIONAL INFORMATION OR EXPLANATIONS. *(Indicate part of report.)*

Sentry Financial Corporation: Engages in equipment financing transactions, business and project development (assets are operational in nature).

Sentry Investments, LLC and Foster Investments Co., LLC : Engage in real estate, commercial real estate, and real estate development in Salt Lake County, UT (assets are operational in nature).

Better Body Foods: Product development and sales (assets are operational in nature).

Part VII, Account #2: In each instance where an asset had one or more reportable transactions, but had no value at the end of the reporting period with no corresponding reportable sales, Column C was intentionally left blank.

Part VII, Column B: Lines reflecting no income are so reported because none was attributed to those particular holdings during the reporting period, whether taxable, tax exempt, or tax deferred, or because the investments do not allocate income to individual holdings, but instead are credited only in unit value.

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IX. CERTIFICATION.

I certify that all information given above (including information pertaining to my spouse and minor or dependent children, if any) is accurate, true, and complete to the best of my knowledge and belief, and that any information not reported was withheld because it met applicable statutory provisions permitting non-disclosure.

I further certify that earned income from outside employment and honoraria and the acceptance of gifts which have been reported are in compliance with the provisions of 5 U.S.C. app. § 13141 et. seq., 5 U.S.C. § 7353, and Judicial Conference regulations.

Signature: s/ Carolyn B. McHugh

NOTE: ANY INDIVIDUAL WHO KNOWINGLY AND WILLFULLY FALSIFIES OR FAILS TO FILE THIS REPORT MAY BE SUBJECT TO CIVIL AND CRIMINAL SANCTIONS (5 U.S.C. app. § 13106)

Committee on Financial Disclosure
Administrative Office of the United States Courts
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