

HAND DELIVERED

UNITED STATES HOUSE OF REPRESENTATIVES
2024 FINANCIAL DISCLOSURE REPORT

Form A
For Use by Members, Officers, and Employees

(Office Use Only) **MC**

Name: Rohit Khanna

Daytime Telephone: 202-225-2631

A \$200 penalty shall be assessed against any individual who files more than 30 days late.

FILER STATUS	<input checked="" type="checkbox"/> Member of the U.S. House of Representatives	State: <u>CA</u> District: <u>17</u>	<input type="checkbox"/> Officer or Employee	Employing Office: _____	Staff Filer Type: (If Applicable) Shared <input type="checkbox"/> Principal Assistant <input type="checkbox"/>
	REPORT TYPE	<input checked="" type="checkbox"/> 2024 Annual (Due: May 15, 2025)	<input type="checkbox"/> Amendment	<input type="checkbox"/> Termination	Date of Termination: _____

PRELIMINARY INFORMATION - ANSWER EACH OF THESE QUESTIONS

A. Did you, your spouse, or your dependent children: a. Own any reportable asset that was worth more than \$1,000 at the end of the reporting period? <u>or</u> b. Receive more than \$200 in unearned income from any reportable asset during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	F. Did you have any reportable agreement or arrangement with an outside entity during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
B. Did you, your spouse, or your dependent children purchase, sell, or exchange any securities or reportable real estate in a transaction exceeding \$1,000 during the reporting period?	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	G. Did you, your spouse, or your dependent children receive any reportable gift(s) totaling more than \$480 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
C. Did you or your spouse have "earned" income (e.g., salaries, honoraria, or pension/IRA distributions) of \$200 or more during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	H. Did you, your spouse, or your dependent child receive any reportable travel or reimbursements for travel totaling more than \$480 in value from a single source during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
D. Did you, your spouse, or your dependent child have any reportable liability (more than \$10,000) at any point during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	I. Did any individual or organization donate to charity in lieu of paying you for a speech, appearance, or article during the reporting period?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
E. Did you hold any reportable positions during the reporting period or in the current calendar year up through the date of filing?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	ATTACH THE CORRESPONDING SCHEDULE IF YOU ANSWER "YES"	

IPO AND EXCLUSION OF SPOUSE, DEPENDENT, OR TRUST INFORMATION - ANSWER EACH OF THESE QUESTIONS

IPO - Did you purchase any shares that were allocated as a part of an Initial Public Offering during the reporting period? If you answered "Yes" to this question, please contact the Committee on Ethics for further guidance.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
TRUSTS - Details regarding "Qualified Blind Trusts" approved by the Committee on Ethics and certain other "Excepted Trusts" need not be disclosed. Have you excluded from this report details of such a trust that benefits you, your spouse, or dependent child?	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
EXEMPTION - Have you excluded from this report any other assets, "unearned" income, transactions, or liabilities of a spouse or your dependent child because they meet all three tests for exemption? Do not answer "yes" unless you have first consulted with the Committee on Ethics.	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Rohit Khanna

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BLOCK A		BLOCK B													BLOCK C							BLOCK D												BLOCK E																	
Assets and/or Income Sources		Value of Asset													Type of Income							Amount of Income												Transaction																	
SP	DC	A	B	C	D	E	F	G	H	I	J	K	L	M	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED: J, JTR, JT	TAX-DEFERRED	Other Type of Income (Specify e.g. Fairmarket Fluctuate or Farm Income)	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII																	
JT	EIF	None	\$1-\$1,000	\$1,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$2,500,000	\$2,500,001-\$5,000,000	\$5,000,001-\$25,000,000	Over \$25,000,000	Spouse/DC Asset: over \$1,000,000*	NONE	DIVIDENDS	RENT	INTEREST	CAPITAL GAINS	EXCEPTED: J, JTR, JT	TAX-DEFERRED	Other Type of Income (Specify e.g. Fairmarket Fluctuate or Farm Income)	None	\$1-\$250	\$251-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	Over \$1,000,000	Spouse/DC Asset: over \$1,000,000*	P, S, S(part) or E															
		Monte and Usha Ahuja 2010 Irrev Trust FBO Grandchildren																																																	
DC						X										X																						P													
DC		X													X								X															S(part)													
DC					X											X			X																			P													
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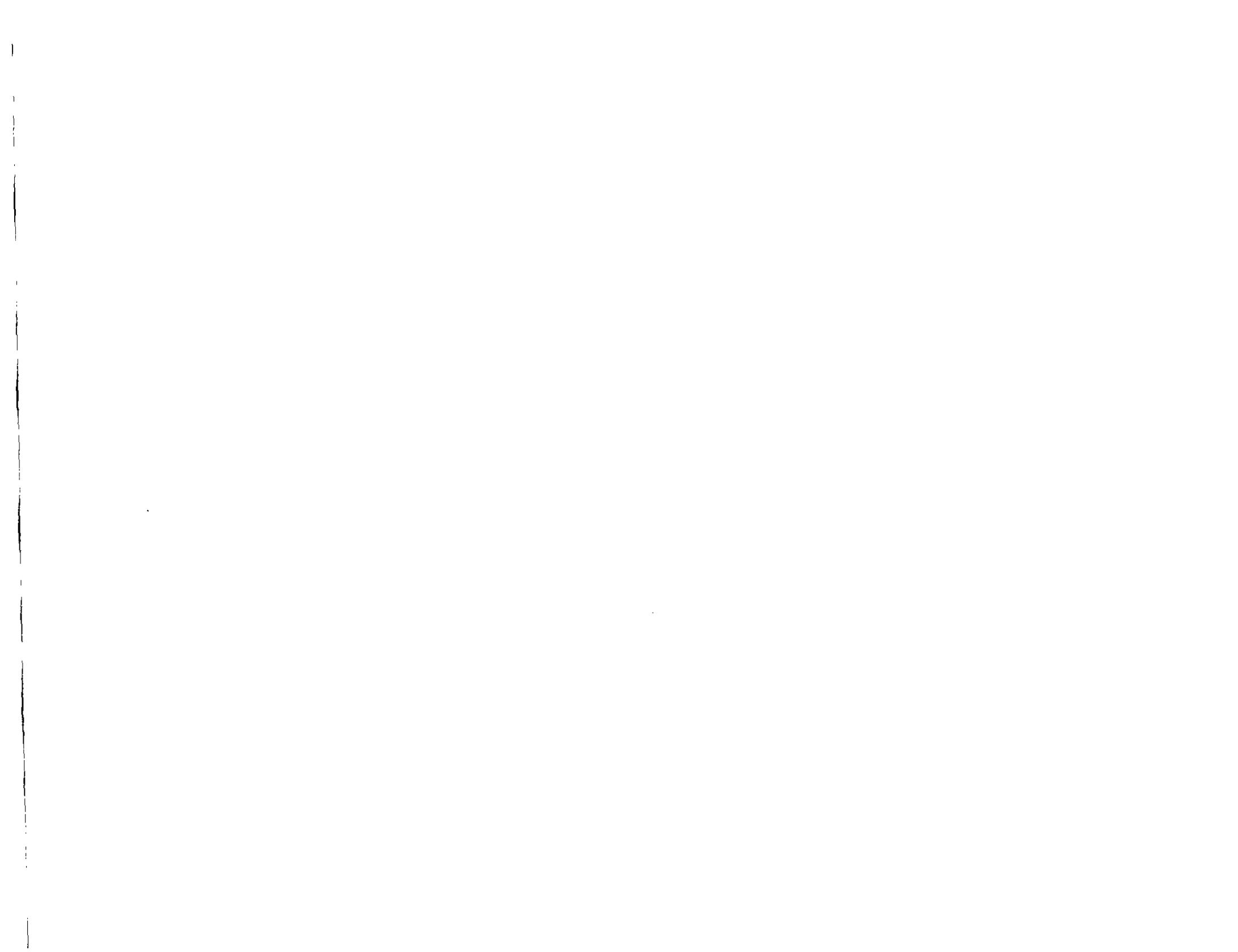
SCHEDULE A - ASSETS & "UNEARNED INCOME"

Name: Rohit Khanna

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BLOCK A		BLOCK B													BLOCK C							BLOCK D											BLOCK E		
Assets and/or Income Sources		Value of Asset													Type of Income							Amount of Income											Transaction		
SP SC JI	ASSET NAME	EIF	A	B	C	D	E	F	G	H	I	J	K	L	M	DIVIDEND	RENT	INTEREST	CAPITAL GAINS	EXCEPTED 50% TRUST	TAX-DEFERRED	Other Type of Income (Specify e.g. "Patent" & "Income of Farm Income")	I	II	III	IV	V	VI	VII	VIII	IX	X	XI	XII	P, S, S(part) or E
			None	\$1-\$1,000	\$1,001-\$5,000	\$5,001-\$50,000	\$50,001-\$250,000	\$250,001-\$500,000	\$500,001-\$1,000,000	\$1,000,001-\$5,000,000	\$5,000,001-\$25,000,000	\$25,000,001-\$50,000,000	Over \$50,000,000	Spouse/DC Asset: over \$1,000,000*	NONE	DIVIDEND	RENT	INTEREST	CAPITAL GAINS	EXCEPTED 50% TRUST	TAX-DEFERRED	Other Type of Income (Specify e.g. "Patent" & "Income of Farm Income")	None	\$1-\$250	\$251-\$1,000	\$1,001-\$2,500	\$2,501-\$5,000	\$5,001-\$15,000	\$15,001-\$50,000	\$50,001-\$100,000	\$100,001-\$1,000,000	\$1,000,001-\$5,000,000	Over \$5,000,000	Spouse/DC Asset with Income over \$1,000,000*	
	Ritu Ahuja 1994 Trust																																		
SP	PUT/XSP @ 530 EXP 09/20/2024	X														X								X											S
SP	PUT/XSP @ 535 EXP 12/20/2024	X																	X							X									S
SP	PUT/XSP @ 540 EXP 08/23/2024	X																	X							X									S
SP	PUT/XSP @ 540 EXP 10/31/2024	X														X							X												S
SP	PUT/XSP @ 540 EXP 11/15/2024	X														X							X												S
SP	PUT/XSP @ 543 EXP 10/18/2024	X																	X							X									S
SP	PUT/XSP @ 545 EXP 12/20/2024	X																	X								X								S
SP	PUT/XSP @ 547 EXP 10/04/2024	X																	X							X									S
SP	PUT/XSP @ 547 EXP 11/29/2024	X																	X							X									S
SP	PUT/XSP @ 548 EXP 09/06/2024	X														X							X												P, S
SP	PUT/XSP @ 555 EXP 01/17/2025	X																	X							X									S
SP	PUT/XSP @ 555 EXP 12/13/2024	X																	X							X									S
SP	PUT/XSP @ 559 EXP 12/06/2024	X																	X							X									S
SP	PUT/XSP @ 565 EXP 01/17/2025	X																	X							X									S
SP	PUT/XSP @ 565 EXP 02/21/2025	X																	X					X											S
SP	PUT/XSP @ 570 EXP 12/27/2024	X																	X							X									S
SP	PUT/XSP @ 580 EXP 01/03/2025	X																	X							X									S
SP	PUT/XSP @ 582 EXP 01/10/2025	X																	X						X										S
SP	PUT/XSP @ 584 EXP 02/07/2025	X														X							X												S
SP	PUT/XSP @ 585 EXP 01/31/2025	X														X							X												S
SP	PUT/XSP @ 587 EXP 02/28/2025	X														X							X												S
SP	PUT/XSP @ 590 EXP 02/21/2025	X														X							X												S
SP	QORVO, INC. CMN	X														X							X												P
SP	QUALCOMM INC CMN				X											X			X								X								P, S, S(part)





SCHEDULE B - TRANSACTIONS

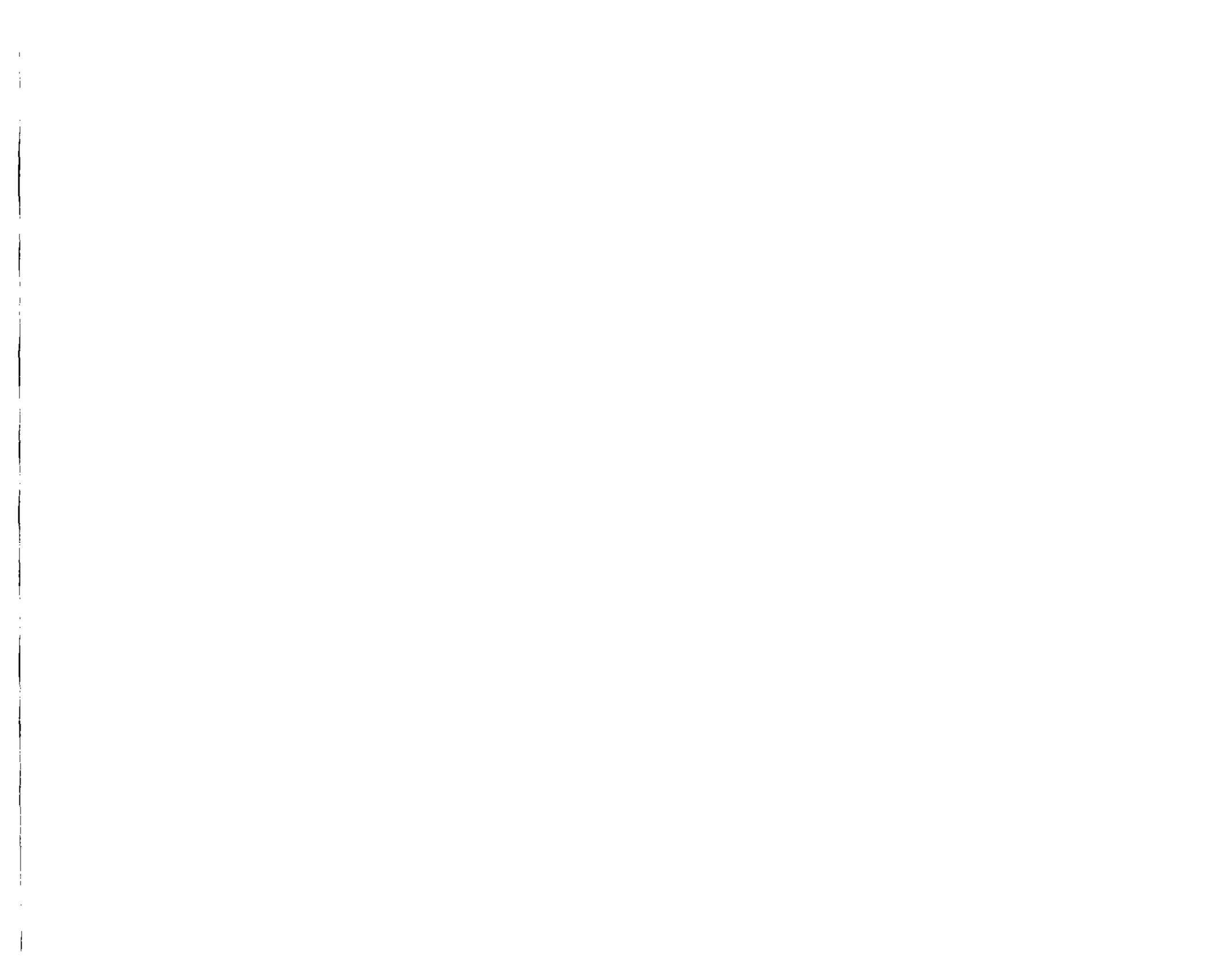
Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction. Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A. * Column K is for assets solely held by your spouse or dependent child.		Type of Transaction				Date (M/D/YR) or Quarterly, Monthly, or Bi-weekly, if applicable	Amount of Transaction											
		Purchase	Sale	Partial Sale	Exchange		Check Box if Capital Gain Exceeded \$200	A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	Monte and Usha Ahuja 2010 Irrev Trust FBO Grandchildren																	
DC	UNION PACIFIC CORP. CMN	X							6/14/2024	X								
DC	GENERAL MOTORS COMPANY CMN	X							6/14/2024	X								
DC	REGAL REXNORD CORP. CMN	X							6/14/2024	X								
DC	PARKER-HANNIFIN CORP. CMN	X							6/14/2024	X								
DC	NASDAQ INC. CMN	X							6/14/2024	X								
DC	BANK OF AMERICA CORP. CMN	X							6/14/2024	X								
DC	BOFA FINANCE LLC LINKED TO S&P 500 INDEX	X							6/21/2024				X					
DC	UBS AG LINKED TO S&P 500 INDEX	X							6/21/2024		X							
DC	CALL/AAPL FLEX EURO PM 195 EXP 07/05/2024	X							7/5/2024	X								
DC	CALL/MSFT FLEX EURO PM 440 EXP 07/05/2024	X							7/5/2024	X								
DC	CALL/GEV FLEX EURO PM @ 155 EXP 07/05/2024	X							7/5/2024	X								
DC	CALL/GOOGL FLEX EURO PM 180 EXP 07/05/2024	X							7/5/2024	X								
DC	AMAZON.COM INC. CMN			X		X			7/5/2024	X								
DC	THE HOME DEPOT, INC. CMN			X					7/10/2024	X								
DC	INTERNATIONAL PAPER CO. CMN	X							7/11/2024	X								
DC	CARMAX, INC. CMN			X					7/11/2024	X								
DC	ABBOTT LABORATORIES CMN	X							7/18/2024	X								
DC	BARCLAYS BANK PLC LINKED TO S&P 500 INDEX	X							7/19/2024				X					
DC	BUILDERS FIRSTSOURCE, INC. CMN	X							7/19/2024	X								
DC	BARCLAYS BANK PLC LINKED TO BASKET OF INDICES	X							7/23/2024		X							
DC	SYSCO CORPORATION CMN	X							7/23/2024	X								
DC	BERKSHIRE HATHAWAY INC. CLASS B			X		X			7/25/2024	X								
DC	ALLSTATE CORPORATION COMMON STOCK			X		X			7/29/2024	X								
DC	INTERNATIONAL PAPER CO. CMN	X							7/31/2024	X								
DC	UNITEDHEALTH GROUP INCORPORATE CMN	X							8/2/2024		X							
DC	AMERICAN TOWER CORPORATION CMN	X							8/2/2024	X								
DC	APPLE INC. CMN	X							8/2/2024	X								
DC	UNITED PARCEL SERVICE, INC. CLASS B COMMON STOCK	X							8/2/2024	X								



SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange			A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$5,000	\$5,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,000- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	Monte and Usha Ahuja 2010 Irrev Trust FBO Grandchildren																	
DC	COLGATE-PALMOLIVE CO CMN	X					12/16/2024	X										
DC	COLGATE-PALMOLIVE CO CMN	X					12/16/2024	X										
DC	JPMORGAN CHASE & CO. HYBRID PERPETUAL USD	X					12/16/2024	X										
DC	COLGATE-PALMOLIVE CO CMN	X					12/16/2024	X										
DC	CITIGROUP INC. HYBRID PERPETUAL	X					12/16/2024	X										
DC	PEPSICO, INC. CMN			X			12/16/2024	X										
DC	BERKSHIRE HATHAWAY INC. CLASS B	X					12/17/2024	X										
DC	COLGATE-PALMOLIVE CO CMN	X					12/17/2024	X										
DC	PEPSICO, INC. CMN			X			12/17/2024	X										
DC	STRYKER CORPORATION CMN			X		X	12/17/2024	X										
DC	COLGATE-PALMOLIVE CO CMN	X					12/18/2024	X										
DC	COLGATE-PALMOLIVE CO CMN	X					12/18/2024	X										
DC	PEPSICO, INC. CMN			X			12/18/2024	X										
DC	PEPSICO, INC. CMN			X			12/18/2024	X										
DC	ROYAL BANK OF CANADA LINKED TO S&P 500 INDEX	X					12/19/2024	X										
DC	STRYKER CORPORATION CMN			X			12/19/2024	X										
DC	STRYKER CORPORATION CMN		X			X	12/19/2024	X										
DC	PEPSICO, INC. CMN		X				12/19/2024	X										
DC	COLGATE-PALMOLIVE CO CMN	X					12/20/2024	X										
DC	CAPITAL CALL FOR TPG TECH ADJACENCIES II ACCESS	X					12/13/2024				X							
DC	CAPITAL CALL FOR CARLYLE OPPORTUNITIES ACCESS	X					12/17/2024				X							
DC	CAPITAL CALL FOR WSGG	X					12/12/2024			X								
DC	CAPITAL CALL FOR WSGG	X					3/25/2024			X								
DC	CAPITAL CALL FOR TPG TECH ADJACENCIES II ACCESS	X					5/6/2024			X								
DC	CAPITAL CALL FOR WSSS	X					8/12/2024			X								
DC	CAPITAL CALL FOR WSGG	X					5/16/2024		X									
DC	CAPITAL CALL FOR STRATEGIC INVESTORS XI ACCESS	X					5/28/2024		X									
DC	CAPITAL CALL FOR DRAGONEER OPPORTUNITIES VI ACCESS	X					10/9/2024		X									







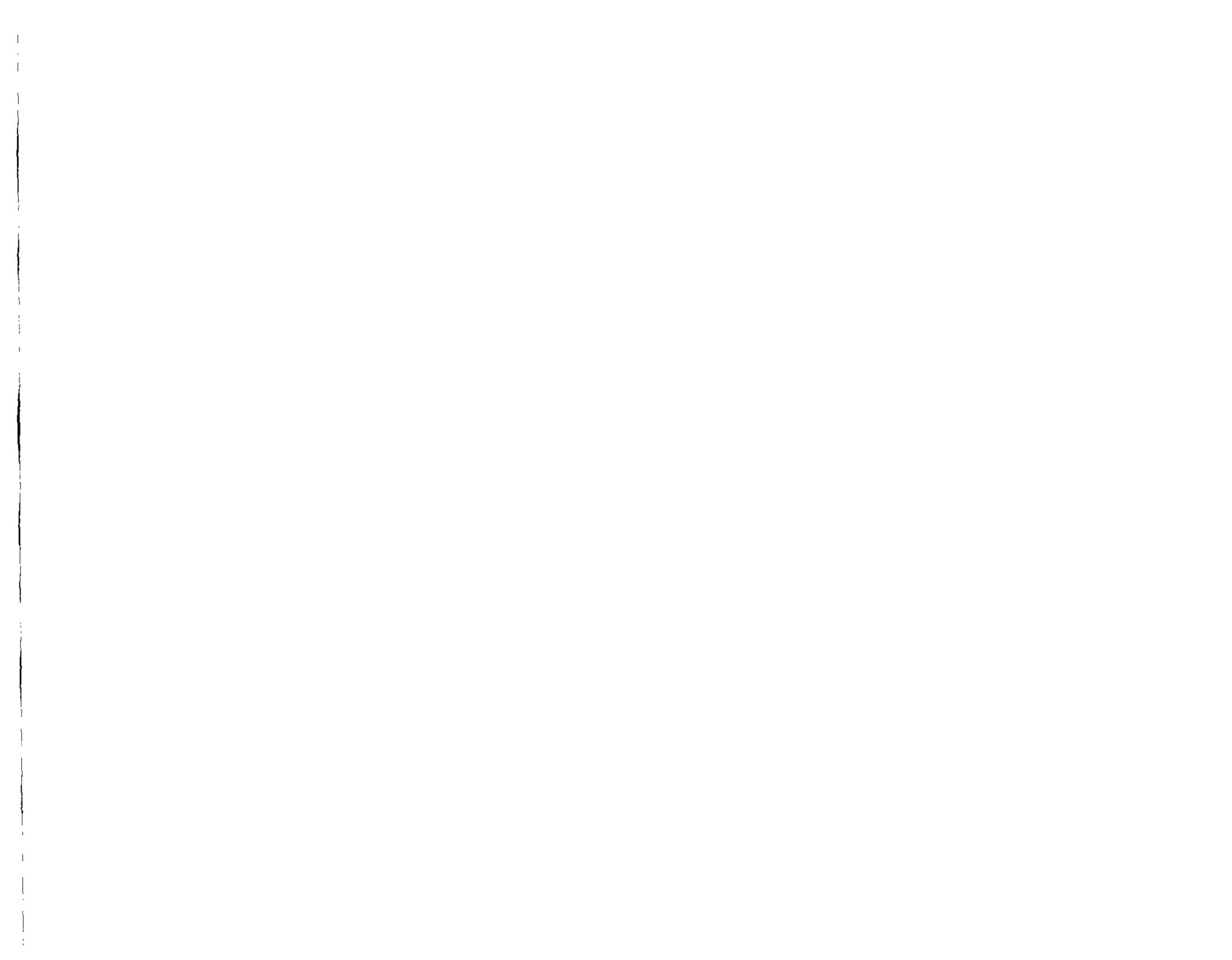






SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange		Check Box if Capital Gain Exceeded \$200	A \$1,001- \$5,000	B \$5,001- \$25,000	C \$25,001- \$50,000	D \$50,001- \$100,000	E \$100,001- \$250,000	F \$250,001- \$500,000	G \$500,001- \$1,000,000	H \$1,000,001- \$5,000,000	I \$5,000,001- \$25,000,000	J Over \$25,000,000
SP, DC, JT	ASSET																
	2020 Trust FBO Khanna Children																
DC	M&T BANK CORPORATION CMN	X							9/9/2024	X							
DC	CONSTELLATION BRANDS INC CMN CLASS A	X							9/9/2024	X							
DC	ALBEMARLE CORP CMN	X							9/9/2024	X							
DC	SALESFORCE INC CMN			X		X			9/9/2024	X							
DC	NETAPP, INC. CMN		X						9/9/2024	X							
DC	CELANESE CORPORATION COMMON STOCK		X						9/9/2024	X							
DC	PNC FINANCIAL SERVICES GROUP, CMN		X			X			9/9/2024	X							
DC	GENUINE PARTS CO. CMN		X						9/9/2024	X							
DC	CHIPOTLE MEXICAN GRILL, INC. CMN			X		X			9/9/2024	X							
DC	PTC INC. CMN		X						9/9/2024	X							
DC	CENTENE CORPORATION CMN		X						9/9/2024	X							
DC	DOLLAR GENERAL CORPORATION CMN		X						9/9/2024	X							
DC	NXP SEMICONDUCTORS N.V. CMN		X						9/9/2024	X							
DC	BLACKROCK, INC. CMN			X		X			9/9/2024	X							
DC	NVIDIA CORPORATION CMN			X		X			9/9/2024	X							
DC	CINTAS CORPORATION CMN			X		X			9/9/2024	X							
DC	BOOKING HOLDINGS INC. CMN			X					9/9/2024	X							
DC	ON SEMICONDUCTOR CORPORATION CMN			X					9/9/2024	X							
DC	TRUIST FINANCIAL CORPORATION CMN		X			X			9/9/2024	X							
DC	FIRST SOLAR, INC. CMN		X						9/9/2024	X							
DC	MODERNA, INC. CMN		X						9/9/2024	X							
DC	WEST PHARMACEUTICAL SERVICES INC		X						9/9/2024	X							
DC	BIOGEN INC. CMN		X						9/9/2024	X							
DC	AMERICAN INTL GROUP, INC. CMN			X					9/9/2024	X							
DC	PACCAR INC CMN			X					9/9/2024	X							
DC	LULULEMON ATHLETICA INC. CMN			X					9/9/2024	X							
DC	MONSTER BEVERAGE CORPORATION CMN		X						9/9/2024	X							
DC	FMC CORPORATION CMN			X					9/9/2024	X							











SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange		Check/Exp. Excl. Exceeded \$200	A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$5,000	\$5,001- \$25,000	\$25,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000
SP, DG, JT	ASSET																	
	Ritu Ahuja 1994 Trust																	
SP	ARISTA NETWORKS, INC. CMN	X							1/10/2024	X								
SP	AIRBNB, INC. CMN CLASS A	X							1/10/2024	X								
SP	AMETEK INC (NEW) CMN	X							1/10/2024	X								
SP	QUANTA SERVICES INC CMN	X							1/10/2024	X								
SP	TE CONNECTIVITY LTD CMN	X							1/10/2024	X								
SP	CINTAS CORPORATION CMN	X							1/10/2024	X								
SP	KLA CORP CMN	X							1/10/2024	X								
SP	EQUIFAX INC. CMN	X							1/10/2024	X								
SP	LULULEMON ATHLETICA INC. CMN	X							1/10/2024	X								
SP	AUTODESK, INC. CMN	X							1/10/2024	X								
SP	D.R. HORTON, INC. CMN	X							1/10/2024	X								
SP	PALO ALTO NETWORKS INC. CMN	X							1/10/2024	X								
SP	MODERNA, INC. CMN	X							1/10/2024	X								
SP	OTIS WORLDWIDE CORPORATION CMN	X							1/10/2024	X								
SP	ROYAL CARIBBEAN GROUP ISIN LR0008862868	X							1/10/2024	X								
SP	T. ROWE PRICE GROUP, INC. CMN	X							1/10/2024	X								
SP	COPART, INC. CMN	X							1/10/2024	X								
SP	NXP SEMICONDUCTORS N.V. CMN	X							1/10/2024	X								
SP	ON SEMICONDUCTOR CORPORATION CMN	X							1/10/2024	X								
SP	ENPHASE ENERGY, INC. CMN	X							1/10/2024	X								
SP	WALT DISNEY COMPANY (THE) CMN	X							1/10/2024	X								
SP	VERISIGN, INC. CMN	X							1/10/2024	X								
SP	PHILIP MORRIS INTL INC CMN	X							1/10/2024	X								
SP	BIOGEN INC. CMN	X							1/10/2024	X								
SP	AMERIPRISE FINANCIAL, INC. CMN	X							1/10/2024	X								
SP	MOODY'S CORPORATION CMN	X							1/10/2024	X								
SP	META PLATFORMS INC-CLASS A CMN CLASS A	X							1/10/2024	X								
SP	ELECTRONIC ARTS CMN	X							1/10/2024	X								



SCHEDULE B - TRANSACTIONS

Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction. Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A. * Column K is for assets solely held by your spouse or dependent child.		Type of Transaction				Check Box if Capital Gain Exceeded \$200	Date (MO/DA/YR) or Quarterly, Monthly, or Bi-weekly, if applicable	Amount of Transaction										
		Purchase	Sale	Partial Sale	Exchange			A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	Ritu Ahuja 1994 Trust																	
SP	VERISK ANALYTICS, INC. CMN	X					4/23/2024	X										
SP	FORTIVE CORPORATION CMN	X					4/23/2024	X										
SP	DAYFORCE INC CMN	X					4/23/2024	X										
SP	DUPONT DE NEMOURS INC CMN	X					4/23/2024	X										
SP	CORTEVA, INC. CMN	X					4/23/2024	X										
SP	LAS VEGAS SANDS CORP. CMN	X					4/23/2024	X										
SP	TAPESTRY, INC. CMN	X					4/23/2024	X										
SP	OLD DOMINION FREIGHT LINE, INC CMN	X					4/23/2024	X										
SP	TE CONNECTIVITY LTD CMN	X					4/23/2024	X										
SP	UNITED AIRLINES HOLDINGS INC CMN	X					4/23/2024	X										
SP	MODERNA, INC. CMN	X					4/23/2024	X										
SP	TAKE TWO INTERACTIVE SOFTWARE INC	X					4/23/2024	X										
SP	COSTAR GROUP, INC. CMN	X					4/23/2024	X										
SP	PAYCHEX, INC. CMN	X					4/23/2024	X										
SP	TJX COMPANIES INC (NEW) CMN	X					4/23/2024	X										
SP	CADENCE DESIGN SYSTEMS INC CMN	X					4/23/2024	X										
SP	ULTA BEAUTY INC CMN	X					4/23/2024	X										
SP	ROCKWELL AUTOMATION INC CMN	X					4/23/2024	X										
SP	PUBLIC STORAGE CMN	X					4/23/2024	X										
SP	PALO ALTO NETWORKS INC. CMN	X					4/23/2024	X										
SP	AUTOMATIC DATA PROCESSING INC CMN	X					4/23/2024	X										
SP	JOHNSON & JOHNSON CMN			X		X	4/23/2024		X									
SP	CROWN CASTLE INTL CORP CMN		X				4/23/2024		X									
SP	THE HOME DEPOT, INC. CMN			X			4/23/2024		X									
SP	ADOBE INC CMN			X		X	4/23/2024		X									
SP	CISCO SYSTEMS, INC. CMN			X			4/23/2024		X									
SP	NIKE CLASS-B CMN CLASS B			X			4/23/2024		X									
SP	COSTCO WHOLESALE CORPORATION CMN			X			4/23/2024		X									

SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange			A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	Ritu Ahuja 1994 Trust																	
SP	ORACLE CORPORATION CMN	X					5/28/2024	X										
SP	SALESFORCE INC CMN	X					5/28/2024	X										
SP	COSTCO WHOLESALE CORPORATION CMN	X					5/28/2024	X										
SP	D.R. HORTON, INC. CMN	X					5/28/2024	X										
SP	BROADCOM INC. CMN	X					5/28/2024	X										
SP	CISCO SYSTEMS, INC. CMN	X					5/28/2024	X										
SP	APTIV PLC CMN	X					5/28/2024	X										
SP	TRUIST FINANCIAL CORPORATION CMN	X					5/28/2024	X										
SP	ALPHABET INC. CMN CLASS A	X					5/28/2024	X										
SP	APPLIED MATERIALS INC CMN	X					5/28/2024	X										
SP	PROLOGIS INC CMN	X					5/28/2024	X										
SP	AUTODESK, INC. CMN	X					5/28/2024	X										
SP	NASDAQ INC. CMN	X					5/28/2024	X										
SP	CBRE GROUP, INC. CMN CLASS A	X					5/28/2024	X										
SP	WALMART INC CMN	X					5/28/2024	X										
SP	CARRIER GLOBAL CORPORATION CMN	X					5/28/2024	X										
SP	GLOBAL PAYMENTS INC. CMN	X					5/28/2024	X										
SP	BORGWARNER INC. CMN	X					5/28/2024	X										
SP	MSCI INC. CMN	X					5/28/2024	X										
SP	CENTENE CORPORATION CMN	X					5/28/2024	X										
SP	MORGAN STANLEY CMN	X					5/28/2024	X										
SP	KIMCO REALTY OP, LLC CMN	X					5/28/2024	X										
SP	HEALTHPEAK OP, LLC CMN	X					5/28/2024	X										
SP	DISCOVER FINANCIAL SERVICES CMN	X					5/28/2024	X										
SP	LAM RESEARCH CORPORATION CMN	X					5/28/2024	X										
SP	FREEMPORT-MCMORAN INC CMN	X					5/28/2024	X										
SP	FIFTH THIRD BANCORP CMN	X					5/28/2024	X										
SP	SYNCHRONY FINANCIAL CMN	X					5/28/2024	X										



SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange			A \$1,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	Ritu Ahuja 1994 Trust																	
SP	INFINERA CORPORATION CMN			X			7/10/2024	X										
SP	CORNING INCORPORATED CMN			X		X	7/11/2024	X										
SP	INFINERA CORPORATION CMN			X			7/11/2024	X										
SP	WALT DISNEY COMPANY (THE) CMN	X					7/12/2024	X										
SP	NATIONAL GRID PLC SPONSORED ADR CMN	X					7/12/2024	X										
SP	UNILEVER PLC (NEW) SPONSORED ADR CMN	X					7/12/2024	X										
SP	SANOFI SPONSORED ADR CMN	X					7/12/2024	X										
SP	NCR VOYIX CORP CMN	X					7/12/2024	X										
SP	ISHARES MSCI AUSTRALIA ETF	X					7/12/2024	X										
SP	SCHNEIDER ELECTRIC SE UNSPONSORED ADR (FRANCE)	X					7/12/2024	X										
SP	ABB LTD SPONSORED ADR CMN	X					7/12/2024	X										
SP	ASML HOLDING N.V. ADR CMN	X					7/12/2024	X										
SP	CALL/TSM FLEX EURO PM @ 165 EXP 07/12/2024	X					7/12/2024	X										
SP	NOVO-NORDISK A/S ADR ADR CMN			X		X	7/12/2024	X										
SP	INFINERA CORPORATION CMN			X		X	7/12/2024	X										
SP	NCR VOYIX CORP CMN	X					7/15/2024	X										
SP	ELANCO ANIMAL HEALTH INCORPORA CMN	X					7/15/2024	X										
SP	PUT/XSP @ 548 EXP 09/06/2024		X				7/15/2024	X										
SP	LIONS GATE ENTERTAINMENT CORP. CMN CLASS B	X					7/16/2024	X										
SP	MOHAWK INDUSTRIES INC COMMON STOCK			X		X	7/16/2024	X										
SP	ELANCO ANIMAL HEALTH INCORPORA CMN	X					7/17/2024	X										
SP	INFINERA CORPORATION CMN			X			7/17/2024	X										
SP	WALT DISNEY COMPANY (THE) CMN	X					7/18/2024	X										
SP	LIONS GATE ENTERTAINMENT CORP. CMN CLASS B	X					7/18/2024	X										
SP	ELANCO ANIMAL HEALTH INCORPORA CMN	X					7/18/2024	X										
SP	PUT/XSP @ 530 EXP 09/06/2024		X				7/22/2024	X										
SP	INFINERA CORPORATION CMN			X			7/22/2024	X										
SP	BARCLAYS BANK PLC LINKED TO BASKET OF INDICES	X					7/23/2024		X									









SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange			A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	Ritu Ahuja 1994 Trust																	
SP	MASTERCARD INCORPORATED CMN CLASS A	X					11/12/2024	X										
SP	ALLSTATE CORPORATION COMMON STOCK	X					11/12/2024	X										
SP	WALMART INC CMN	X					11/12/2024	X										
SP	DEXCOM, INC. CMN	X					11/12/2024	X										
SP	THE KRAFT HEINZ CO CMN	X					11/12/2024	X										
SP	CHIPOTLE MEXICAN GRILL, INC. CMN	X					11/12/2024	X										
SP	BAXTER INTERNATIONAL INC CMN	X					11/12/2024	X										
SP	DOLLAR GENERAL CORPORATION CMN	X					11/12/2024	X										
SP	PUT/XSP @ 580 EXP 01/03/2025		X				11/12/2024	X										
SP	ABBOTT LABORATORIES CMN		X			X	11/12/2024		X									
SP	COCA-COLA COMPANY (THE) CMN		X			X	11/12/2024		X									
SP	BLACKROCK FUNDING, INC. CMN		X			X	11/12/2024		X									
SP	LINDE PLC CMN		X			X	11/12/2024		X									
SP	ILLINOIS TOOL WORKS CMN		X			X	11/12/2024		X									
SP	STRYKER CORPORATION CMN		X			X	11/12/2024		X									
SP	UNION PACIFIC CORP. CMN		X			X	11/12/2024		X									
SP	EMERSON ELECTRIC CO. CMN		X			X	11/12/2024		X									
SP	CSX CORPORATION CMN			X		X	11/12/2024		X									
SP	PRUDENTIAL FINANCIAL INC CMN		X			X	11/12/2024		X									
SP	AMPHENOL CORP CL-A (NEW) CMN CLASS A		X			X	11/12/2024		X									
SP	JOHNSON CONTROLS INTERNATIONAL CMN			X		X	11/12/2024		X									
SP	QUALCOMM INC CMN		X			X	11/12/2024		X									
SP	METLIFE, INC. CMN		X			X	11/12/2024		X									
SP	CHARLES SCHWAB CORPORATION CMN		X			X	11/12/2024		X									
SP	MARSH & MCLENNAN CO INC CMN		X			X	11/12/2024		X									
SP	BLACKSTONE GROUP INC/THE CMN			X		X	11/12/2024		X									
SP	HILTON WORLDWIDE HOLDINGS INC. CMN		X			X	11/12/2024		X									
SP	INTERCONTINENTAL EXCHANGE INC CMN		X			X	11/12/2024		X									



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		Purchase	Sale	Partial Sale	Exchange			A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	Ritu Ahuja 1994 Trust																	
SP	VULCAN MATERIALS CO CMN		X				12/16/2024	X										
SP	CIGNA GROUP/THE CMN		X				12/16/2024	X										
SP	ROPER TECHNOLOGIES INC CMN		X				12/16/2024	X										
SP	J B HUNT TRANS SVCS INC CMN		X				12/16/2024	X										
SP	HUNTINGTON BANCSHARES INCORPOR CMN		X				12/16/2024	X										
SP	BROWN & BROWN, INC. CMN		X				12/16/2024	X										
SP	SYNOPSIS INC. CMN		X				12/16/2024	X										
SP	MEDTRONIC PUBLIC LIMITED COMPA CMN		X				12/16/2024	X										
SP	NORFOLK SOUTHERN CORP CMN			X			12/16/2024	X										
SP	ON SEMICONDUCTOR CORPORATION CMN		X				12/16/2024	X										
SP	INTL BUSINESS MACHINES CORP CMN			X			12/16/2024	X										
SP	IDEX CORPORATION COMMON STOCK		X				12/16/2024	X										
SP	BERKSHIRE HATHAWAY INC. CLASS B			X			12/16/2024	X										
SP	CVS HEALTH CORP CMN		X				12/16/2024	X										
SP	QUEST DIAGNOSTICS INCORPORATED CMN		X				12/16/2024	X										
SP	CENTENE CORPORATION CMN		X				12/16/2024	X										
SP	MASTERCARD INCORPORATED CMN CLASS A			X			12/16/2024	X										
SP	EVEREST GROUP LTD CMN		X				12/16/2024	X										
SP	PROCTER & GAMBLE COMPANY (THE) CMN			X			12/16/2024	X										
SP	MONOLITHIC POWER SYSTEMS, INC. CMN		X				12/16/2024	X										
SP	MOLINA HEALTHCARE, INC. CMN		X				12/16/2024	X										
SP	HARTFORD FINANCIAL SRVCS GROUP CMN		X				12/16/2024	X										
SP	ADOBE INC CMN			X			12/16/2024	X										
SP	AIRBNB, INC. CMN CLASS A			X			12/16/2024	X										
SP	KEURIG DR PEPPER INC CMN			X			12/16/2024	X										
SP	STANLEY BLACK & DECKER, INC. CMN		X				12/16/2024	X										
SP	PPG INDUSTRIES, INC. CMN			X			12/16/2024	X										
SP	HASBRO, INC. CMN		X				12/16/2024	X										





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		Purchase	Sale	Partial Sale	Exchange			A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	M & R Trust Partnership																	
	- 2020 Trust FBO Khanna Children																	
DC	OHIO ST MAJOR NEW ST REV 5% 12/15/24 JD	X					6/6/2024				X							
DC	COLUMBUS OHIO CITY SCH DIST GO 5% 12/01/26 JD	X					6/6/2024		X									
DC	BEAVERCREEK OHIO CITY SCH DIST GO 5% 12/01/29 JD	X					6/7/2024			X								
DC	OHIO ST ADULT CORRECTIONAL CAP REV 5% 10/01/24 AO	X					6/7/2024		X									
DC	HAMILTON CNTY OHIO SWR SYS REV REV 5.0000% 12/01/24 JD	X					6/7/2024		X									
DC	BEAVERCREEK OHIO CITY SCH DIST GO 5% 12/01/32 JD	X					6/7/2024	X										
DC	OHIO ST MAJOR NEW ST REV 5% 12/15/24 JD	X					6/18/2024		X									
DC	GE VERNOVA LLC CMN	X					6/20/2024			X								
DC	HONEYWELL INTL INC CMN	X					6/20/2024			X								
DC	TRANE TECHNOLOGIES PUBLIC LIMI CMN	X					6/20/2024			X								
DC	STEEL DYNAMICS, INC. CMN	X					6/20/2024			X								
DC	EXXON MOBIL CORPORATION CMN	X					6/20/2024			X								
DC	AMEREN CORPORATION CMN	X					6/20/2024			X								
DC	INGERSOLL RAND INC CMN	X					6/20/2024			X								
DC	PHILLIPS 66 CMN	X					6/20/2024			X								
DC	XCEL ENERGY INC. CMN	X					6/20/2024			X								
DC	CHEVRON CORPORATION CMN	X					6/20/2024			X								
DC	FIRSTENERGY CORP. CMN	X					6/20/2024			X								
DC	LINDE PLC CMN	X					6/20/2024			X								
DC	CMS ENERGY CORPORATION CMN	X					6/20/2024			X								
DC	LENNOX INTERNATIONAL INC CMN	X					6/20/2024			X								
DC	EATON CORP PLC CMN	X					6/20/2024			X								
DC	EMERSON ELECTRIC CO. CMN	X					6/20/2024		X									
DC	ROCKWELL AUTOMATION INC CMN	X					6/20/2024		X									
DC	CUMMINS INC COMMON STOCK	X					6/20/2024		X									
DC	QUANTA SERVICES INC CMN	X					6/20/2024		X									
DC	MICRON TECHNOLOGY, INC. CMN	X					6/20/2024		X									

SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange			A \$1,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	M & R Trust Partnership																	
	- 2020 Trust FBO Khanna Children																	
DC	HONEYWELL INTL INC CMN	X					6/24/2024		X									
DC	GE VERNOVA LLC CMN	X					6/24/2024		X									
DC	TRANE TECHNOLOGIES PUBLIC LIMI CMN	X					6/24/2024		X									
DC	STEEL DYNAMICS, INC. CMN	X					6/24/2024		X									
DC	EXXON MOBIL CORPORATION CMN	X					6/24/2024		X									
DC	AMEREN CORPORATION CMN	X					6/24/2024		X									
DC	INGERSOLL RAND INC CMN	X					6/24/2024		X									
DC	PHILLIPS 66 CMN	X					6/24/2024		X									
DC	CHEVRON CORPORATION CMN	X					6/24/2024		X									
DC	XCEL ENERGY INC. CMN	X					6/24/2024		X									
DC	FIRSTENERGY CORP. CMN	X					6/24/2024		X									
DC	LINDE PLC CMN	X					6/24/2024		X									
DC	CMS ENERGY CORPORATION CMN	X					6/24/2024		X									
DC	LENNOX INTERNATIONAL INC CMN	X					6/24/2024		X									
DC	EATON CORP PLC CMN	X					6/24/2024		X									
DC	EMERSON ELECTRIC CO. CMN	X					6/24/2024		X									
DC	CUMMINS INC COMMON STOCK	X					6/24/2024		X									
DC	ROCKWELL AUTOMATION INC CMN	X					6/24/2024		X									
DC	QUANTA SERVICES INC CMN	X					6/24/2024		X									
DC	CHART INDUSTRIES, INC. CMN	X					6/24/2024		X									
DC	MARTIN MARIETTA MATERIALS, INC CMN	X					6/24/2024		X									
DC	VERTIV HOLDINGS LLC CMN	X					6/24/2024		X									
DC	ALBEMARLE CORP CMN	X					6/24/2024		X									
DC	OHIO ST GO 5% 04/01/25 AO	X					7/1/2024				X							
DC	TOLEDO OHIO CITY SCH DIST GO 5% 12/01/24 JD	X					7/1/2024	X										
DC	STATE OF OHIO GEN OBLIGATION GO 5.0000% 11/01/24 MN	X					7/2/2024	X										
DC	OHIO ST WTR DEV AUTH WTR REV 5% 12/01/24 JD	X					7/5/2024		X									

SCHEDULE B - TRANSACTIONS

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		Purchase	Sale	Partial Sale	Exchange			A \$1,001-\$15,000	B \$15,001-\$50,000	C \$50,001-\$100,000	D \$100,001-\$250,000	E \$250,001-\$500,000	F \$500,001-\$1,000,000	G \$1,000,001-\$5,000,000	H \$5,000,001-\$25,000,000	I \$25,000,001-\$50,000,000	J Over \$50,000,000	K Over \$1,000,000 (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	M & R Trust Partnership																	
	- 2020 Trust FBO Khanna Children																	
DC	AMERICAN TOWER CORPORATION 2.3% 09/15/2031 USD	X					11/18/2024	X										
DC	NXP B.V. 2.5% 05/11/2031 USD	X					11/18/2024	X										
DC	CONSTELLATION BRANDS, INC. 2.25% 08/01/2031 USD	X					11/18/2024	X										
DC	EVERSOURCE ENERGY 5.85% 04/15/2031 USD	X					11/18/2024	X										
DC	NEXTERA ENERGY, INC. CMN	X					11/21/2024			X								
DC	ATLISSIAN CORP CMN	X					11/21/2024		X									
DC	BROADCOM INC. CMN	X					11/21/2024	X										
DC	GE VERNOVA LLC CMN			X		X	11/21/2024		X									
DC	APPROVIN CORPORATION CMN CLASS A			X			11/21/2024	X										
DC	TRANÉ TECHNOLOGIES PUBLIC LIMIT CMN			X		X	11/21/2024	X										
DC	MARVELL TECHNOLOGY, INC. CMN			X			11/21/2024	X										
DC	DELL TECHNOLOGIES INC. CMN			X			11/21/2024	X										
DC	AMAZON.COM INC CMN			X			11/21/2024	X										
DC	NEW ALBANY PLAIN LOC SCH DIST GO 4% 12/01/25 JD	X					12/2/2024	X										
DC	OHIO HSG FIN AGY MULTIFAMILY REV 3.8500% 07/01/25 JJ	X					12/3/2024			X								
DC	OHIO ST DB 5% 05/01/25 MN	X					12/3/2024		X									
DC	CUBESMART LP 2.0% 05/18/2032 USD	X					12/3/2024	X										
DC	WASTE CONNECTIONS INC 3.2% 06/01/2032 USD	X					12/3/2024	X										
DC	AEP TEXAS INC 4.7% 05/15/2032 USD	X					12/3/2024	X										
DC	JM SMUCKER CO 2.125% 03/15/2032 USD	X					12/3/2024	X										
DC	BELL CANADA 2.15% 02/15/2032 USD	X					12/3/2024	X										
DC	T-MOBILE USA, INC. 2.7% 03/15/2032 USD	X					12/3/2024	X										
DC	BAXTER INTERNATIONAL INC 2.539% 02/01/2032 USD	X					12/3/2024	X										
DC	ROPER TECHNOLOGIES INC 4.75% 02/15/2032	X					12/3/2024	X										
DC	AUTOZONE INC 4.75% 08/01/2032 USD	X					12/3/2024	X										
DC	AMGEN INC. 2.0% 01/15/2032 USD	X					12/3/2024	X										
DC	OHIO ST WTR DEV AUTH WTR REV 5% 12/01/25 JD	X					12/4/2024			X								

SCHEDULE B - TRANSACTIONS

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Report any purchase, sale, or exchange transactions that exceeded \$1,000 in the reporting period of any security or real property held by you, your spouse, or your dependent child for investment or the production of income. Include transactions that resulted in a capital loss. Provide a brief description of an exchange transaction. Exclude transactions between you, your spouse, or dependent children, or the purchase or sale of your personal residence, unless it generated rental income. If only a portion of an asset is sold, please choose "partial sale" as the type of transaction. Capital Gains: If a sales transaction resulted in a capital gain in excess of \$200, check the "capital gains" box, unless it was an asset in a tax-deferred account, and disclose the capital gain income on Schedule A. * Column K is for assets solely held by your spouse or dependent child.		Type of Transaction				Check Box "Cap. G." - Exceeded \$200	Date (M/D/YR) or Quarterly, Monthly, or Bi-weekly, if applicable	Amount of Transaction										
		Purchase	Sale	Partial Sale	Exchange			A \$1,001- \$15,000	B \$15,001- \$50,000	C \$50,001- \$100,000	D \$100,001- \$250,000	E \$250,001- \$500,000	F \$500,001- \$1,000,000	G \$1,000,001- \$5,000,000	H \$5,000,001- \$25,000,000	I \$25,000,001- \$50,000,000	J Over \$50,000,000	K Over \$1,000,000* (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	ARECO LP																	
	- 2020 Trust FBO Khanna Children																	
DC	MAI CAPITAL INCOME AND GROWTH FUND VI - CC	X					1/26/2024		X									
DC	MAI CAPITAL INCOME AND GROWTH FUND VI - CC	X					4/30/2024			X								
DC	MAI CAPITAL INCOME AND GROWTH FUND VI - CC	X					9/25/2024			X								
DC	MAI CAPITAL INCOME AND GROWTH FUND VI - CC	X					10/24/2024				X							
DC	MAI CAPITAL INCOME AND GROWTH FUND VI - CC	X					12/19/2024			X								
DC	CITYMARK TX5 CO-INVEST - CC	X					10/23/2024		X									
DC	CITYMARK TX5 CO-INVEST - CC	X					8/19/2024	X										
DC	FPA NEW INCOME FUND	X					2/9/2024				X							
DC	UNITED STATES TREASURY BILL ZERO CPN 5/30/2024	X					3/1/2024					X						
DC	UNITED STATES TREAS BILLS ZERO CPN 9/5/2024	X					6/11/2024					X						
DC	CALL (SPX) NEW S&P 500 JUN 21 24 \$4600	X					6/17/2024			X								
DC	CALL (SPX) NEW S&P 500 JUN 21 24 \$4700	X					6/17/2024			X								
DC	UNITED STATES TREAS BILLS ZERO CPN 12/12/2024	X					9/12/2024					X						
DC	HAMILTON CNTY OHIO HOSP FACS REV VAR 03.240000% 06/01/2027 REV BDS THE	X					10/31/2024		X									
DC	HARRIS CNTY TEX CULTURAL ED FACS FIN 03.300000% 10/01/2045 CORP REV HO	X					10/31/2024			X								
DC	OHIO ST HOSP REV VAR BDS UNIVERSITY HOSPS 03.250000% 01/15/2051 HLTH S	X					10/31/2024			X								
DC	UNITED STATES TREAS BILLS ZERO CPN 0.000000% 02/08/2024		X				2/8/2024				X							
DC	FIDELITY GOVERNMENT CASH RESERVES			X			1/31/2024	X										
DC	FIDELITY GOVERNMENT CASH RESERVES		X				2/29/2024	X										
DC	VANGUARD SPECIALIZED FUNDS DIV APP ETF	X					3/27/2024	X										
DC	UNITED STATES TREAS BILLS ZERO CPN 0.000000% 05/30/2024		X				5/30/2024					X						
DC	FIDELITY GOVERNMENT CASH RESERVES	X					6/28/2024	X										
DC	VANGUARD SPECIALIZED FUNDS DIV APP ETF	X					7/2/2024	X										
DC	FIDELITY GOVERNMENT CASH RESERVES			X			7/31/2024	X										
DC	UNITED STATES TREAS BILLS ZERO CPN 0.000000% 08/08/2024		X				8/8/2024				X							
DC	FIDELITY GOVERNMENT CASH RESERVES		X				8/30/2024	X										
DC	UNITED STATES TREAS BILLS ZERO CPN 0.000000% 09/05/2024		X				9/5/2024					X						

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		Purchase	Sale	Partial Sale	Exchange			A	B	C	D	E	F	G	H	I	J	K
								\$1,001- \$15,000	\$15,001- \$50,000	\$50,001- \$100,000	\$100,001- \$250,000	\$250,001- \$500,000	\$500,001- \$1,000,000	\$1,000,001- \$5,000,000	\$5,000,001- \$25,000,000	\$25,000,001- \$50,000,000	Over \$50,000,000	Over \$1,000,000 (Spouse/DC Asset)
SP, DC, JT	ASSET																	
	MURA Holdings																	
	- Ritu Ahuja 1994 Trust																	
SP	RIVERSIDE TECHNOLOGY CAPITAL SOLUTIONS II - CC	X					2/8/2024	X										
SP	MAI GLADEBROOK VENTURE FUND - CC	X					3/6/2024		X									
SP	MAI GLADEBROOK VENTURE FUND - CC	X					6/27/2024			X								
SP	MAI GP STAKING FUND - CC	X					5/24/2024			X								
SP	MAI GP STAKING FUND - CC	X					12/13/2024			X								
SP	MAI CAPITAL SPORTS & ENTERTAINMENT SEEDING FUND - CC	X					5/13/2024				X							
SP	MAI CAPITAL SPORTS & ENTERTAINMENT SEEDING FUND - CC	X					6/14/2024		X									
SP	MAI CAPITAL SPORTS & ENTERTAINMENT SEEDING FUND - CC	X					6/26/2024			X								
SP	MAI CAPITAL SPORTS & ENTERTAINMENT SEEDING FUND - CC	X					8/22/2024		X									
SP	MAI CAPITAL SPORTS & ENTERTAINMENT SEEDING FUND - CC	X					10/16/2024		X									
SP	ORANGEWOOD III - CC	X					9/13/2024		X									
SP	SILVER POINT DISTRESSED OPPORTUNITY II FUND - CC	X					5/29/2024		X									
SP	PCM UNISON HOLDINGS GP, LLC - CC	X					10/30/2024				X							
SP	CALL (SPX) NEW S&P 500 JUN 21 24 \$4600	X					6/17/2024					X						
SP	CALL (SPX) NEW S&P 500 JUN 21 24 \$4700	X					6/17/2024				X							
SP	UNITED STATES TREAS BILLS ZERO CPN 9/5/2024		X				6/26/2024				X							
SP	VERSUS CAPITAL REAL ASSETS			X		X	8/23/2024				X							
SP	MAI MANAGED VOL INCOME INSTL		X			X	10/23/2024				X							
SP	VERSUS CAPITAL REAL ASSETS			X			11/26/2024			X								
SP	FIDELITY GOVERNMENT CASH RESERVES	X					1/31/2024	X										
SP	UNITED STATES TREAS BILLS ZERO CPN 0.00000% 02/08/2024		X				2/8/2024				X							
SP	VERSUS CAPITAL REAL ASSETS	X					2/14/2024	X										
SP	FIDELITY GOVERNMENT CASH RESERVES	X					2/29/2024	X										
SP	UNITED STATES TREASURY BILL ZERO CPN 5/30/2024	X					3/1/2024				X							
SP	UNITED STATES TREAS BILLS ZERO CPN 0.00000% 03/07/2024		X				3/7/2024				X							
SP	MAI MANAGED VOL INCOME INSTL	X					3/26/2024	X										
SP	VANGUARD SPECIALIZED FUNDS DIV APP ETF	X					3/27/2024	X										

FILER NOTES
(Optional)

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NOTE NUMBER	NOTES
	Pursuant to 2025 Instruction Guide, Financial Disclosure Reports for Calendar Year 2024
	and Periodic Transaction Reports, the value bracket that represents the percentage interest
	in the asset is selected.

Use additional sheets if more space is required.