

Seeks to provide long-term growth of capital using both active and passive ETFs

Model description

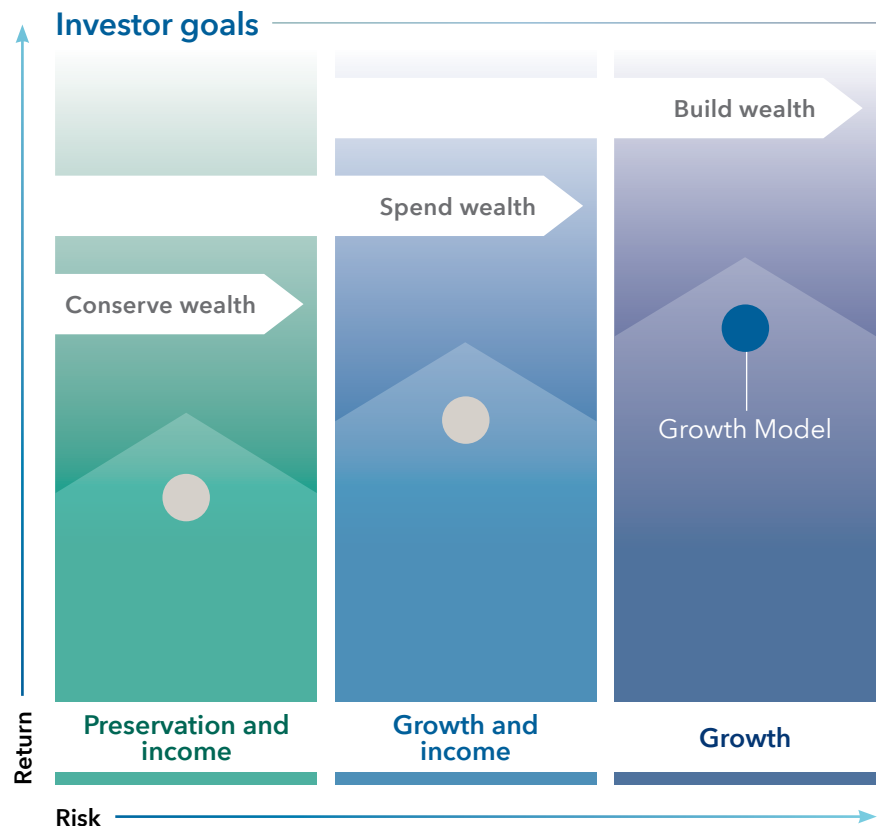
Seeks long-term growth of capital by investing primarily in U.S. companies with strong growth potential through active Capital Group exchange-traded funds (ETFs) and passive ETFs.

Created by Capital Group

In creating the Capital Group Active-Passive Growth Model, the Portfolio Solutions Committee (PSC) relied on their in-depth understanding of the underlying funds. Our models are constructed and monitored by the PSC, seasoned investment professionals with support from the Capital Solutions Group, while the underlying funds are managed by their respective portfolio managers. The Portfolio Solutions Committee has an average of 30 years of investment industry experience.*

For investors who ...

- Seek a broadly diversified all-equity investment.
- Seek wealth accumulation and can withstand market fluctuations over the long term.
- Could benefit from further diversifying their equity allocations.
- Seeks the tax advantages of the ETF vehicle and greater transparency of the underlying holdings.
- Value a diversified and experienced active investment manager, complemented by passive investment strategies, to help them accomplish their goals.



*As of December 31, 2024.

Advisory services offered through Capital Research Management Company (CRMC) and its RIA affiliates.

Model portfolios are provided to financial intermediaries who may or may not recommend them to clients. The portfolios consist of an allocation of funds for investors to consider and are not intended to be investment recommendations. The portfolios are asset allocations designed for individuals with different time horizons, investment objectives and risk profiles. Allocations may change and may not achieve investment objectives. If a cash allocation is not reflected in a model, the intermediary may choose to add one. Capital Group does not have investment discretion or authority over investment allocations in client accounts. Rebalancing approaches may differ depending on where the account is held. Investors should talk to their financial professional for information on other investment alternatives that may be available. In making investment decisions, investors should consider their other assets, income and investments.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

Underlying funds	Weight
CGUS – Capital Group Core Equity ETF	20%
CGGR – Capital Group Growth ETF	20%
CGGO – Capital Group Global Growth Equity ETF	14%
IVV – iShares Core S&P 500 ETF	10%
VT – Vanguard Total World Stock Index Fund ETF	10%
CGMM – Capital Group U.S. Small and Mid Cap ETF	8%
VUG – Vanguard Growth Index Fund ETF	8%
CGDG – Capital Group Dividend Growers ETF	6%
CGNG – Capital Group New Geography Equity ETF	4%

Top five industry	Weight
Semiconductors & semiconductor equipment	9.1%
Software	7.8%
Interactive media & services	7.1%
Hotels, restaurants & leisure	4.6%
Aerospace & defense	4.6%

Top five equity holdings	Weight
Microsoft	4.7%
Meta Platforms	3.7%
Apple	3.3%
NVIDIA	3.3%
Alphabet	3.0%

Capital Group Active-Passive Growth Model

Asset mix ¹	Weight
Total equities	
U.S. equities	78.6%
Non-U.S. equities	19.3%
Total fixed income	
U.S. fixed income	n/a
Non-U.S. fixed income	n/a
Cash and equivalents ²	2.1%

The Portfolio Solutions Committee

This model is actively monitored by the committee – a group of senior investment professionals with varied backgrounds and approaches, and decades of investment industry experience. They regularly review the model’s results and holdings to keep it aligned with its objectives.



Michelle Black
30 years



Brittain Ezzes
27 years



Samir Mathur
32 years



Damien McCann
25 years



Wesley Phoa
32 years



John Queen
35 years



Andrew Suzman
31 years

Investment industry experience as of December 31, 2024.

¹Totals may not reconcile due to rounding.

²For Capital Group ETFs, cash and equivalents includes short-term securities, accrued income and other assets less liabilities. It may also include investments in money market or similar funds managed by the investment adviser or its affiliates that are not offered to the public.

Model portfolios are subject to the risks associated with the underlying funds in the model portfolio. Investors should carefully consider investment objectives, risks, fees and expenses of the funds in the model portfolio, which are contained in the fund prospectuses. Investing outside the United States involves risks, such as currency fluctuations, periods of illiquidity and price volatility. These risks may be heightened in connection with investments in developing countries. Smaller company stocks entail additional risks, and they can fluctuate in price more than larger company stocks. A nondiversified fund has the ability to invest a larger percentage of assets in the securities of a smaller number of issuers than a diversified fund. As a result, poor results by a single issuer could adversely affect fund results more than if the fund were invested in a larger number of issuers. See the applicable prospectus for details.

Portfolios are managed, so holdings will change. Holdings-based information is based on the weighted average of the underlying funds.

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