

Retirement plan investments quarterly statistical update

Share Class R-6

Data as of March 31, 2026, unless otherwise noted.



Figures shown are past results and are not predictive of results in future periods. Current and future results may be lower or higher than those shown. Investing for short periods makes losses more likely. Prices and returns will vary, so investors may lose money. For current fund information and month-end results, visit capitalgroup.com.

Returns will vary, so investors may lose money. (American Funds U.S. Government Money Market Fund)

The following R share funds are offered without a sales charge to eligible retirement plans. Please refer to each fund's most recent prospectus for details.

For money market funds, the annualized 7-day SEC yield more accurately reflects the fund's current earnings than does the fund's return.

You could lose money by investing in American Funds U.S. Government Money Market Fund. Although the fund seeks to preserve the value of your investment at \$1.00 per share, it cannot guarantee it will do so. An investment in the fund is not a bank account and is not insured or guaranteed by the Federal Deposit Insurance Corporation or any other government agency. The fund's sponsor is not required to reimburse the fund for losses, and you should not expect that the sponsor will provide financial support to the fund at any time, including during periods of market stress.

Class R-6 shares	Inception date	Average annual total returns				Expense ratio (gross/net) ²
		1 year	5 years	10 years	Lifetime ¹	
Data for periods ended 03/31/2026 (%)						
Growth						
AMCAP Fund®	05/01/1967	15.63	7.88	11.97	11.80	0.33/0.33
American Funds® Global Insight Fund	04/01/2011	17.60	7.75	10.93	9.30	0.45/0.45
American Funds® International Vantage Fund	04/01/2011	16.89	6.02	8.76	6.70	0.55/0.54
Emerging Markets Equities Fund	05/30/1986	26.12	0.97	7.51	11.54	0.80/0.74
EUPAC Fund™	04/16/1984	22.30	4.08	8.40	10.33	0.47/0.47
The Growth Fund of America®	12/01/1973	18.19	9.75	14.84	13.95	0.29/0.29
The New Economy Fund®	12/01/1983	32.00	9.46	13.93	11.93	0.40/0.40
New Perspective Fund®	03/13/1973	17.48	7.72	12.72	12.49	0.40/0.40
New World Fund®	06/17/1999	24.59	5.13	9.73	8.40	0.57/0.57
SMALLCAP World Fund®	04/30/1990	21.19	0.92	9.45	9.58	0.65/0.65
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	29.81	3.49	6.78	4.88	0.78/0.78
American Mutual Fund®	02/21/1950	12.21	10.12	11.12	11.78	0.27/0.27
Capital World Growth and Income Fund®	03/26/1993	23.63	9.39	11.06	10.80	0.41/0.41
Fundamental Investors®	08/01/1978	24.49	12.65	14.00	12.92	0.28/0.28
International Growth and Income Fund	10/01/2008	28.18	8.07	9.06	7.90	0.53/0.53
The Investment Company of America®	01/01/1934	18.51	13.03	13.52	12.51	0.27/0.27
Washington Mutual Investors Fund	07/31/1952	13.45	11.73	12.92	12.19	0.26/0.26
Equity-income						
Capital Income Builder®	07/30/1987	16.79	8.73	7.94	9.18	0.26/0.26
The Income Fund of America®	12/01/1973	16.03	8.72	8.95	10.88	0.26/0.26
Balanced						
American Balanced Fund®	07/26/1975	17.75	8.86	9.82	10.78	0.25/0.25
American Funds® Global Balanced Fund	02/01/2011	15.25	5.80	6.95	6.68	0.47/0.47

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

Class R-6 shares	Average annual total returns					Expense ratio (gross/net) ²
	Data for periods ended 03/31/2026 (%)	Inception date	1 year	5 years	10 years	
Bond						
American Funds Corporate Bond Fund®	12/14/2012	4.22	0.48	2.90	3.09	0.31/0.31
American Funds Emerging Markets Bond Fund®	04/22/2016	10.81	3.35	–	4.32	0.54/0.54
American Funds Inflation Linked Bond Fund®	12/14/2012	2.71	0.91	2.68	1.93	0.29/0.29
American Funds Mortgage Fund®	11/01/2010	5.28	0.82	1.77	2.18	0.26/0.26
American Funds® Core Plus Bond Fund	09/25/2025	–	–	–	0.89	0.61/0.34
American Funds® Multi-Sector Income Fund	03/22/2019	6.01	3.27	–	4.81	0.37/0.37
American Funds® Strategic Bond Fund	03/18/2016	3.77	-0.17	2.56	2.66	0.31/0.31
American High-Income Trust®	02/19/1988	7.50	5.36	6.75	7.66	0.36/0.36
The Bond Fund of America®	05/28/1974	4.37	0.54	2.25	6.99	0.23/0.23
Capital World Bond Fund®	08/04/1987	3.99	-1.71	0.81	5.16	0.48/0.48
Intermediate Bond Fund of America®	02/19/1988	4.48	1.62	2.17	4.42	0.25/0.25
Short-Term Bond Fund of America®	10/02/2006	3.92	2.11	2.06	2.00	0.29/0.29
U.S. Government Securities Fund®	10/17/1985	4.24	0.52	1.62	5.11	0.25/0.25
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.39%/3.39% as of 03/31/2026]	05/01/2009	3.84	3.21	2.02	1.19	0.30/0.30
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	11.66	6.64	7.35	7.39	0.31/0.31
American Funds® Global Growth Portfolio	05/18/2012	22.13	7.10	11.37	11.30	0.45/0.45
American Funds® Growth and Income Portfolio	05/18/2012	16.60	8.49	10.33	10.43	0.34/0.34
American Funds® Growth Portfolio	05/18/2012	20.19	8.41	12.29	12.46	0.38/0.38
American Funds® Moderate Growth and Income Portfolio	05/18/2012	15.35	7.27	8.91	9.18	0.35/0.35
American Funds® Preservation Portfolio	05/18/2012	4.17	1.83	2.13	1.93	0.28/0.28
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	10.26	4.82	5.70	5.76	0.30/0.30
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	15.24	7.88	8.29	8.28	0.32/0.32
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	13.24	6.56	7.11	7.11	0.31/0.31
Retirement target date						
American Funds 2030 Target Date Retirement Fund®	02/01/2007	13.12	6.40	8.90	7.30	0.33/0.33
American Funds 2035 Target Date Retirement Fund®	02/01/2007	14.63	7.20	10.10	7.90	0.34/0.34
American Funds 2040 Target Date Retirement Fund®	02/01/2007	17.42	8.14	10.91	8.34	0.36/0.36
American Funds 2045 Target Date Retirement Fund®	02/01/2007	18.26	8.32	11.13	8.45	0.37/0.37
American Funds 2050 Target Date Retirement Fund®	02/01/2007	18.37	8.25	11.18	8.47	0.37/0.37
American Funds 2055 Target Date Retirement Fund®	02/01/2010	18.89	8.23	11.16	10.77	0.38/0.38
American Funds 2060 Target Date Retirement Fund®	03/27/2015	18.96	8.21	11.14	9.96	0.39/0.39
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	10.28	5.31	6.35	5.46	0.28/0.28
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	10.62	5.42	6.68	5.74	0.30/0.30
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	11.29	5.67	7.13	6.04	0.30/0.30
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	11.60	5.76	7.86	6.63	0.31/0.31
American Funds® 2065 Target Date Retirement Fund	03/27/2020	18.97	8.21	–	14.64	0.39/0.39
American Funds® 2070 Target Date Retirement Fund	05/03/2024	19.08	–	–	13.84	0.39/0.39

Rankings are based on the named investments' average annual total returns within the applicable categories. The rankings do not reflect the effects of sales charges, account fees or taxes. Past results are not predictive of results in future periods.

American Funds Morningstar rankings

Data for periods ended 03/31/2026	Morningstar category	Inception date	1 year			5 years			10 years		
			Rank	Funds in category	Peer group percentile	Rank	Funds in category	Peer group percentile	Rank	Funds in category	Peer group percentile
Growth											
AMCAP Fund®	Large Growth	05/01/1967	587	1077	56	622	937	71	673	763	88
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	183	323	58	173	292	60	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	120	382	36	44	332	21	–	–	–
Emerging Markets Equities Fund	Diversified Emerging Mkts	05/30/1986	584	735	78	502	617	85	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	45	382	16	118	332	40	64	225	36
The Growth Fund of America®	Large Growth	12/01/1973	353	1077	39	350	937	44	294	763	41
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	9	314	4	23	274	9	10	193	9
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	65	314	21	80	274	25	38	193	20
New World Fund®	Diversified Emerging Mkts	06/17/1999	599	735	81	174	617	38	54	461	12
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	61	168	46	78	147	55	19	93	26
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	488	735	66	348	617	65	336	461	75
American Mutual Fund®	Large Value	02/21/1950	786	1090	74	380	983	42	301	823	41
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	35	323	14	91	292	37	55	207	32
Fundamental Investors®	Large Blend	08/01/1978	71	1312	6	105	1122	10	141	886	20
International Growth and Income Fund	Foreign Large Blend	10/01/2008	97	685	17	201	617	38	121	486	27
The Investment Company of America®	Large Blend	01/01/1934	295	1312	25	71	1122	8	316	886	39
Washington Mutual Investors Fund	Large Value	07/31/1952	672	1090	65	85	983	11	44	823	7
Equity-income											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	57	177	43	15	168	10	91	142	77
The Income Fund of America®	Global Moderate Allocation	12/01/1973	116	414	32	27	394	7	9	325	3
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	24	488	8	10	445	4	22	371	8
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	156	414	40	155	394	44	165	325	52
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	120	166	88	99	148	80	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	79	207	38	49	190	30	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	74	147	68	75	131	71	19	108	20
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	50	128	51	23	123	22	6	105	5
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	–	–	–	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	135	356	37	56	305	27	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	452	539	87	379	455	90	89	355	29
American High-Income Trust®	High Yield Bond	02/19/1988	102	612	17	18	538	3	17	437	4
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	151	444	36	71	377	23	23	279	10
Capital World Bond Fund®	Global Bond	08/04/1987	81	146	64	83	141	69	63	123	52
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	174	544	41	411	496	89	222	379	68
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	394	544	81	273	496	65	247	379	75
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	15	102	11	9	90	12	3	73	3

American Funds Morningstar rankings

Data for periods ended 03/31/2026	Morningstar category	Inception date	1 year			5 years			10 years		
			Rank	Funds in category	Peer group percentile	Rank	Funds in category	Peer group percentile	Rank	Funds in category	Peer group percentile
Portfolio series											
American Funds® Conservative Growth and Income Portfolio	Moderately Conservative Allocation	05/18/2012	43	215	17	8	199	2	13	164	12
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	12	134	12	64	124	59	4	101	3
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	50	123	39	26	117	22	20	100	22
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	8	88	9	4	87	3	1	68	1
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	80	488	17	101	445	22	96	371	26
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	309	544	66	348	496	78	231	379	71
Retirement income portfolio series											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	106	215	46	74	199	28	86	164	46
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	89	488	17	47	445	11	165	371	44
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	202	488	37	202	445	41	296	371	81
Retirement target date											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	75	194	41	2	176	1	1	115	1
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	87	189	50	8	168	5	1	116	1
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	50	187	27	13	169	10	2	115	1
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	67	184	39	34	168	24	2	116	1
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	100	187	64	65	169	49	4	115	5
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	97	184	61	71	168	52	7	115	7
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	100	184	64	73	168	53	8	82	11
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	3	86	3	1	69	1	2	50	1
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	17	91	20	1	77	1	2	56	1
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	35	106	29	2	91	1	4	61	9
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	63	137	45	2	120	1	3	83	3
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065+	03/27/2020	152	256	69	64	132	59	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2065+	05/03/2024	149	256	68	–	–	–	–	–	–

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the fund prospectuses and/or summary prospectuses as applicable, which can be obtained from a financial professional and should be read carefully before investing.

Investments in mortgage-related securities involve additional risks, such as prepayment risk.

The use of derivatives involves a variety of risks, which may be different from, or greater than, the risks associated with investing in traditional securities, such as stocks and bonds.

Interests in Capital Group's U.S. Government Securities portfolios are not guaranteed by the U.S. government.

Investing in developing markets may be subject to additional risks, such as significant currency and price fluctuations, political instability, differing securities regulations and periods of illiquidity, which are detailed in the fund's prospectus. Investments in developing markets have been more volatile than investments in developed markets, reflecting the greater uncertainties of investing in less established economies. Individuals investing in developing markets should have a long-term perspective and be able to tolerate potentially sharp declines in the value of their investments. Lower rated bonds are subject to greater fluctuations in value and risk of loss of income and principal than higher rated bonds.

The return of principal for bond portfolios and for portfolios with significant underlying bond holdings is not guaranteed. Investments are subject to the same interest rate, inflation and credit risks associated with the underlying bond holdings.

While not directly correlated to changes in interest rates, the values of inflation-linked bonds generally fluctuate in response to changes in real interest rates and may experience greater losses than other debt securities with similar durations.

The value of fixed income securities may be affected by changing interest rates and changes in credit ratings of the securities.

Frequent and active trading of portfolio securities may occur, which may involve correspondingly greater transaction costs, adversely affecting the results.

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.

Nondiversified funds have 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 invested in a larger number of issuers. See the applicable prospectus for details.

Smaller company stocks entail additional risks, and they can fluctuate in price more than larger company stocks.

Although the target date portfolios are managed for investors on a projected retirement date time frame, the allocation strategy does not guarantee that investors' retirement goals will be met. Investment professionals manage the portfolio, moving it from a more growth-oriented strategy to a more income-oriented focus as the target date gets closer. The target date is the year that corresponds roughly to the year in which an investor is assumed to retire and begin taking withdrawals. Investment professionals continue to manage each portfolio for approximately 30 years after it reaches its target date. Payments consisting of return of capital will result in a decrease in an investor's fund share balance. Higher rates of withdrawal and withdrawals during declining markets may result in a more rapid decrease in an investor's fund share balance. Persistent returns of capital could ultimately result in a zero account balance.

Allocations may not achieve investment objectives. The portfolios' risks are related to the risks of the underlying funds as described herein, in proportion to their allocations.

Capital Group offers some funds in a range of share classes designed to meet the needs of retirement plan sponsors and participants. The different share classes incorporate varying levels of financial professional compensation and service provider payments. Because Class R-6 shares do not include any recordkeeping payments, expenses are lower and results are higher. Other share classes that include recordkeeping costs have higher expenses and lower results than Class R-6.

American Funds U.S. Government Money Market Fund may suspend 12b-1 payments under agreements between its principal underwriter and intermediaries and other entities that sell fund shares. To the extent such payments have been suspended for a certain share class, should payments subsequently commence, the fund's investment results would be lower and expenses would be higher for that share class. Please refer to the prospectus for additional information.

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Investment results assume all distributions are reinvested and reflect applicable fees and expenses.

When applicable, results reflect fee waivers and/or expense reimbursements, without which they would have been lower and net expenses higher. For more information on fee waivers and expense reimbursements, visit capitalgroup.com.

For Class R-6 shares of the funds listed below, the investment adviser has agreed to reimburse a portion of fund expenses through the date(s) listed below, without which results would have been lower and net expenses higher.

- American Funds Core Plus Bond Fund (expiration: 11/1/26)
- Emerging Markets Equities Fund (expiration: 9/1/2026)
- American Funds International Vantage Fund (expiration: 1/1/2027)

The investment adviser may elect at its discretion to extend, modify or terminate the reimbursements as of any noted expiration date. Please refer to the fund's most recent prospectus for details.

Certain share classes were offered after the inception dates of some funds. Results for these shares prior to the dates of first sale are hypothetical based on the original share class results without a sales charge, adjusted for typical estimated expenses.

- Class R-6 shares were first offered on 5/1/2009.

Results for certain funds with an inception date after the share class inception also include hypothetical returns because those funds' shares sold after the funds' date of first offering. Refer to dates of first sale and specific expense adjustment information at capitalgroup.com.

1. When applicable, returns for less than one year are not annualized, but calculated as cumulative total returns.
2. Expense ratios are as of each fund's prospectus/characteristics statement, as applicable, available at the time of publication. For the American Funds Core Plus Bond Fund share class(es) listed below, expense ratios are estimated.
 - Class R-6

Effective January 1, 2026, the following funds were named as follows:

- American Funds 2010 Target Date Retirement Fund to American Funds 2010 Target Date Retirement Income Fund
 - American Funds 2015 Target Date Retirement Fund to American Funds 2015 Target Date Retirement Income Fund
 - American Funds 2020 Target Date Retirement Fund to American Funds 2020 Target Date Retirement Income Fund
 - American Funds 2025 Target Date Retirement Fund to American Funds 2025 Target Date Retirement Income Fund
- Capital Client Group, Inc.

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Yield Annualized 7-day SEC: The 7-day SEC yield is calculated by annualizing dividends paid over the past seven days. Compared with returns, the 7-day SEC yield more accurately reflects the fund's current earnings. If shown, the net 7-day SEC yield reflects waivers/reimbursements; the gross yield does not reflect waivers/reimbursements.