

Retirement plan investments quarterly statistical update

Share Class R-1

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-1 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	14.36	6.70	10.75	10.49	1.42/1.42
American Funds® Global Insight Fund	04/01/2011	16.42	6.84	9.98	8.28	1.51/1.51
American Funds® International Vantage Fund	04/01/2011	15.71	4.94	7.75	5.64	1.61/1.60
EUPAC Fund™	04/16/1984	20.98	2.94	7.21	9.12	1.57/1.57
The Growth Fund of America®	12/01/1973	16.91	8.57	13.60	12.68	1.37/1.37
The New Economy Fund®	12/01/1983	30.60	8.28	12.69	10.68	1.49/1.49
New Perspective Fund®	03/13/1973	16.20	6.56	11.49	11.23	1.49/1.49
New World Fund®	06/17/1999	23.26	4.00	8.50	7.17	1.66/1.66
SMALLCAP World Fund®	04/30/1990	19.87	-0.18	8.25	8.34	1.74/1.74
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	28.35	2.37	5.62	3.74	1.88/1.88
American Mutual Fund®	02/21/1950	10.99	8.93	9.90	10.50	1.36/1.36
Capital World Growth and Income Fund®	03/26/1993	22.28	8.20	9.85	9.56	1.51/1.51
Fundamental Investors®	08/01/1978	23.13	11.43	12.76	11.65	1.37/1.37
International Growth and Income Fund	10/01/2008	26.77	6.89	7.87	6.82	1.64/1.64
The Investment Company of America®	01/01/1934	17.27	11.83	12.30	11.24	1.33/1.33
Washington Mutual Investors Fund	07/31/1952	12.20	10.53	11.70	10.96	1.34/1.34
Equity-income						
Capital Income Builder®	07/30/1987	15.51	7.56	6.76	7.97	1.35/1.35
The Income Fund of America®	12/01/1973	14.75	7.54	7.76	9.65	1.34/1.34
Balanced						
American Balanced Fund®	07/26/1975	16.51	7.69	8.64	9.56	1.32/1.32
American Funds® Global Balanced Fund	02/01/2011	14.03	4.68	5.80	5.59	1.53/1.53

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-1 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	3.09	-0.60	1.91	2.06	1.40/1.40
American Funds Emerging Markets Bond Fund®	04/22/2016	9.75	2.37	–	3.42	1.62/1.62
American Funds Inflation Linked Bond Fund®	12/14/2012	1.64	-0.21	1.54	0.83	1.40/1.40
American Funds Mortgage Fund®	11/01/2010	4.12	-0.30	0.61	1.20	1.38/1.38
American Funds® Core Plus Bond Fund	09/25/2025	–	–	–	0.84	1.70/1.43
American Funds® Multi-Sector Income Fund	03/22/2019	4.92	2.39	–	3.96	1.45/1.45
American Funds® Strategic Bond Fund	03/18/2016	2.65	-1.23	1.56	1.67	1.40/1.40
American High-Income Trust®	02/19/1988	6.34	4.21	5.57	6.45	1.45/1.45
The Bond Fund of America®	05/28/1974	3.24	-0.55	1.13	5.79	1.32/1.32
Capital World Bond Fund®	08/04/1987	2.89	-2.78	-0.32	3.99	1.58/1.58
Intermediate Bond Fund of America®	02/19/1988	3.46	0.54	1.06	3.27	1.31/1.31
Short-Term Bond Fund of America®	10/02/2006	2.80	1.01	0.94	0.89	1.38/1.38
U.S. Government Securities Fund®	10/17/1985	3.12	-0.55	0.51	3.93	1.33/1.33
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.33%/3.33% as of 03/31/2026]	05/01/2009	3.78	3.16	1.96	1.16	0.36/0.36
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	10.60	5.52	6.21	6.25	1.37/1.37
American Funds® Global Growth Portfolio	05/18/2012	20.81	6.00	10.21	10.14	1.52/1.52
American Funds® Growth and Income Portfolio	05/18/2012	15.40	7.33	9.15	9.25	1.42/1.42
American Funds® Growth Portfolio	05/18/2012	18.89	7.24	11.07	11.26	1.47/1.47
American Funds® Moderate Growth and Income Portfolio	05/18/2012	14.12	6.13	7.73	8.02	1.41/1.41
American Funds® Preservation Portfolio	05/18/2012	3.10	0.75	1.02	0.85	1.36/1.36
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	9.12	3.74	4.62	4.72	1.32/1.32
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	14.17	6.81	7.31	7.35	1.34/1.34
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	12.11	5.43	6.01	6.05	1.32/1.32
Retirement target date						
American Funds 2030 Target Date Retirement Fund®	02/01/2007	11.86	5.23	7.69	6.13	1.42/1.42
American Funds 2035 Target Date Retirement Fund®	02/01/2007	13.37	6.03	8.88	6.72	1.43/1.43
American Funds 2040 Target Date Retirement Fund®	02/01/2007	16.15	6.96	9.68	7.15	1.45/1.45
American Funds 2045 Target Date Retirement Fund®	02/01/2007	16.94	7.14	9.90	7.26	1.46/1.46
American Funds 2050 Target Date Retirement Fund®	02/01/2007	17.12	7.08	9.95	7.29	1.46/1.46
American Funds 2055 Target Date Retirement Fund®	02/01/2010	17.59	7.05	9.94	9.55	1.47/1.47
American Funds 2060 Target Date Retirement Fund®	03/27/2015	17.68	7.02	9.94	8.82	1.48/1.48
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	9.05	4.17	5.19	4.30	1.37/1.37
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	9.36	4.27	5.50	4.57	1.39/1.39
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	10.07	4.54	5.96	4.88	1.39/1.39
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	10.34	4.60	6.67	5.47	1.40/1.40
American Funds® 2065 Target Date Retirement Fund	03/27/2020	17.67	7.05	–	13.60	1.49/1.49
American Funds® 2070 Target Date Retirement Fund	05/03/2024	18.33	–	–	13.38	1.48/1.48

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	678	1077	63	736	937	80	738	763	96
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	210	323	63	203	292	70	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	143	382	38	87	332	31	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	76	382	22	159	332	50	122	225	57
The Growth Fund of America®	Large Growth	12/01/1973	475	1077	47	531	937	60	527	763	67
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	25	314	5	57	274	18	39	193	20
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	95	314	26	118	274	38	80	193	36
New World Fund®	Diversified Emerging Mkts	06/17/1999	623	735	83	287	617	57	156	461	34
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	83	168	51	105	147	66	37	93	38
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	537	735	71	416	617	73	419	461	89
American Mutual Fund®	Large Value	02/21/1950	909	1090	82	674	983	69	599	823	75
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	65	323	21	158	292	54	115	207	61
Fundamental Investors®	Large Blend	08/01/1978	99	1312	8	370	1122	33	513	886	60
International Growth and Income Fund	Foreign Large Blend	10/01/2008	173	685	26	366	617	64	318	486	68
The Investment Company of America®	Large Blend	01/01/1934	547	1312	44	256	1122	24	604	886	68
Washington Mutual Investors Fund	Large Value	07/31/1952	793	1090	75	290	983	33	180	823	24
Equity-income											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	123	177	74	42	168	30	131	142	96
The Income Fund of America®	Global Moderate Allocation	12/01/1973	188	414	47	68	394	17	71	325	22
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	57	488	12	69	445	15	122	371	32
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	223	414	56	289	394	78	273	325	84
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	162	166	99	144	148	98	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	125	207	54	117	190	60	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	133	147	88	121	131	88	94	108	87
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	112	128	84	106	123	90	91	105	89
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	–	–	–	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	269	356	74	181	305	63	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	530	539	99	448	455	100	312	355	91
American High-Income Trust®	High Yield Bond	02/19/1988	365	612	59	166	538	31	129	437	34
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	417	444	95	349	377	97	242	279	90
Capital World Bond Fund®	Global Bond	08/04/1987	134	146	93	130	141	92	110	123	85
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	492	544	94	490	496	100	367	379	99
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	538	544	100	477	496	98	376	379	100
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	89	102	91	75	90	92	60	73	90

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	82	215	34	53	199	18	61	164	32
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	36	134	21	103	124	78	46	101	42
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	79	123	51	72	117	46	64	100	49
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	28	88	15	40	87	37	14	68	4
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	156	488	28	258	445	53	226	371	58
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	523	544	97	484	496	99	371	379	100
Retirement income portfolio series											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	156	215	69	142	199	71	145	164	90
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	153	488	28	156	445	30	274	371	73
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	274	488	53	327	445	71	355	371	95
Retirement target date											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	139	194	76	95	176	59	74	115	67
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	144	189	80	106	168	67	51	116	43
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	115	187	67	100	169	63	52	115	43
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	131	184	75	121	168	76	72	116	65
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	144	187	83	136	169	86	79	115	73
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	136	184	79	144	168	89	81	115	76
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	137	184	81	150	168	91	60	82	76
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	51	86	64	18	69	15	44	50	86
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	74	91	75	26	77	25	50	56	85
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	86	106	77	33	91	37	52	61	85
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	112	137	83	74	120	69	61	83	78
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065+	03/27/2020	209	256	85	117	132	92	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2065+	05/03/2024	181	256	75	–	–	–	–	–	–

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.

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.

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.

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.

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

Although American Funds Global Balanced Fund, International Growth and Income Fund, and American Funds Mortgage Fund have plans of distribution for Class R-1 shares, fees for distribution are not paid on amounts invested in the fund by the investment adviser and/or its affiliates. If fees for these services were charged on these assets, fund results would have been lower and expenses would have been higher. 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-1 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)
- 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-1 shares were first offered on 5/15/2002.

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-1

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.