## Retirement plan investments quarterly statistical update

Share Class R-1

Data as of September 30, 2025, 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	_					
Data for periods ended 09/30/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime <sup>1</sup>	Expense ratio (gross/net) 2
Growth						
AMCAP Fund®	05/01/1967	15.79	11.56	12.08	10.71	1.42/1.42
American Funds® Global Insight Fund	04/01/2011	14.23	10.28	10.47	8.66	1.52/1.52
American Funds® International Vantage Fund	04/01/2011	12.01	7.33	7.89	5.83	1.62/1.62
EUPAC Fund™	04/16/1984	13.54	6.32	7.10	9.21	1.57/1.57
The Growth Fund of America®	12/01/1973	22.28	13.92	14.92	12.97	1.38/1.38
The New Economy Fund®	12/01/1983	22.38	11.26	12.75	10.76	1.49/1.49
New Perspective Fund®	03/13/1973	16.35	11.13	12.28	11.41	1.49/1.49
New World Fund®	06/17/1999	14.01	7.34	8.70	7.23	1.66/1.66
SMALLCAP World Fund®	04/30/1990	5.88	4.29	8.13	8.44	1.74/1.74
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	19.79	5.49	5.66	3.56	1.88/1.88
American Mutual Fund®	02/21/1950	10.74	12.28	10.84	10.57	1.35/1.35
Capital World Growth and Income Fund®	03/26/1993	16.36	11.47	9.99	9.63	1.51/1.51
Fundamental Investors®	08/01/1978	20.09	15.59	13.59	11.77	1.36/1.36
International Growth and Income Fund	10/01/2008	17.75	10.19	7.10	6.60	1.64/1.64
The Investment Company of America®	01/01/1934	19.56	16.43	13.59	11.34	1.33/1.33
Washington Mutual Investors Fund	07/31/1952	13.75	15.03	12.80	11.06	1.34/1.34
Equity-income						
Capital Income Builder®	07/30/1987	12.55	9.57	6.94	7.96	1.36/1.36
The Income Fund of America®	12/01/1973	11.53	9.45	7.99	9.64	1.34/1.34
Balanced						
American Balanced Fund®	07/26/1975	13.61	9.53	9.08	9.61	1.31/1.31
American Funds® Global Balanced Fund	02/01/2011	8.23	6.53	6.04	5.63	1.53/1.53

Class R-1 shares		_				
Data for periods ended 09/30/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime <sup>1</sup>	Expense ratio (gross/net) <sup>2</sup>
Bond	inception date	i yeai	J years	10 years	Lifetime	(gloss/fiet)
American Funds Corporate Bond Fund®	12/14/2012	1.89	-1.22	2.38	2.17	1.40/1.40
American Funds Emerging Markets Bond Fund®	04/22/2016	6.52	2.80	_	3.53	1.63/1.63
American Funds Inflation Linked Bond Fund®	12/14/2012	2.94	-0.22	1.90	0.90	1.41/1.41
American Funds Mortgage Fund®	11/01/2010	2.62	-0.73	0.65	1.18	1.44/1.39
American Funds® Core Plus Bond Fund	09/25/2025	_	-	-	0.20	1.70/1.43
American Funds® Multi-Sector Income Fund	03/22/2019	4.90	3.04	_	4.24	1.45/1.45
American Funds® Strategic Bond Fund	03/18/2016	1.91	-1.71	_	1.79	1.40/1.40
American High-Income Trust®	02/19/1988	6.42	5.91	5.38	6.52	1.42/1.42
The Bond Fund of America®	05/28/1974	1.93	-1.01	1.28	5.84	1.34/1.33
Capital World Bond Fund®	08/04/1987	1.51	-2.51	0.26	4.11	1.57/1.57
Intermediate Bond Fund of America®	02/19/1988	3.17	0.22	1.06	3.29	1.35/1.32
Short-Term Bond Fund of America®	10/02/2006	3.20	0.75	0.87	0.87	1.39/1.39
U.S. Government Securities Fund®	10/17/1985	2.16	-1.24	0.63	3.97	1.37/1.33
Money market		-			-	
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.83%/3.83% as of 09/30/2025]	05/01/2009	4.14	2.80	1.79	1.08	0.38/0.38
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	9.12	7.35	6.55	6.36	1.36/1.36
American Funds® Global Growth Portfolio	05/18/2012	16.09	9.97	10.68	10.60	1.52/1.52
American Funds® Growth and Income Portfolio	05/18/2012	13.52	10.49	9.76	9.62	1.42/1.42
American Funds® Growth Portfolio	05/18/2012	17.39	11.77	11.86	11.96	1.47/1.47
American Funds® Moderate Growth and Income Portfolio	05/18/2012	11.16	8.38	8.08	8.22	1.40/1.40
American Funds® Preservation Portfolio	05/18/2012	3.17	0.44	1.01	0.83	1.37/1.37
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	7.53	4.69	4.93	4.77	1.32/1.32
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	11.49	8.90	7.77	7.47	1.32/1.32
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	9.69	6.92	6.34	6.11	1.32/1.32
Retirement target date						
American Funds 2010 Target Date Retirement Fund®	02/01/2007	7.74	5.37	5.48	4.33	1.38/1.38
American Funds 2015 Target Date Retirement Fund®	02/01/2007	7.94	5.72	5.81	4.62	1.39/1.39
American Funds 2020 Target Date Retirement Fund®	02/01/2007	8.60	6.08	6.32	4.95	1.39/1.39
American Funds 2025 Target Date Retirement Fund®	02/01/2007	8.83	6.45	7.07	5.56	1.40/1.40
American Funds 2030 Target Date Retirement Fund®	02/01/2007	10.19	7.61	8.17	6.28	1.42/1.42
American Funds 2035 Target Date Retirement Fund®	02/01/2007	11.59	9.07	9.41	6.91	1.42/1.42
American Funds 2040 Target Date Retirement Fund®	02/01/2007	13.70	10.37	10.23	7.35	1.45/1.45
American Funds 2045 Target Date Retirement Fund®	02/01/2007	14.36	10.68	10.48	7.48	1.46/1.46
American Funds 2050 Target Date Retirement Fund®	02/01/2007	14.44	10.70	10.55	7.52	1.46/1.46
American Funds 2055 Target Date Retirement Fund®	02/01/2010	14.72	10.73	10.56	9.92	1.48/1.48
American Funds 2060 Target Date Retirement Fund®	03/27/2015	14.77	10.72	10.58	9.34	1.48/1.48
American Funds® 2065 Target Date Retirement Fund	03/27/2020	14.70	10.85	-	15.08	1.48/1.48
American Funds® 2070 Target Date Retirement Fund	05/03/2024	15.69	_	-	19.01	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 1 year 5 years 10 years Funds in Peer group Funds in Peer group Funds in Peer group Data for periods ended 09/30/2025 Morningstar category Inception date percentile Rank category percentile Rank category percentile Rank category Growth AMCAP Fund® 05/01/1967 Large Growth American Funds® Global Insight Fund Global Large-Stock Blend 04/01/2011 American Funds® International Vantage Fund Foreign Large Growth 04/01/2011 EUPAC Fund™ Foreign Large Growth 04/16/1984 The Growth Fund of America® 12/01/1973 Large Growth The New Economy Fund® Global Large-Stock Growth 12/01/1983 New Perspective Fund® Global Large-Stock Growth 03/13/1973 New World Fund® Diversified Emerging Mkts 06/17/1999 SMALLCAP World Fund® Global Small/Mid Stock 04/30/1990 Growth and income American Funds® Developing World Growth Diversified Emerging Mkts 02/03/2014 and Income Fund American Mutual Fund® Large Value 02/21/1950 Capital World Growth and Income Fund® Global Large-Stock Blend 03/26/1993 Fundamental Investors® Large Blend 08/01/1978 International Growth and Income Fund Foreign Large Blend 10/01/2008 The Investment Company of America® Large Blend 01/01/1934 Washington Mutual Investors Fund Large Value 07/31/1952 **Equity-income** Capital Income Builder® Global Moderately Aggressive 07/30/1987 Allocation The Income Fund of America® Global Moderate Allocation 12/01/1973 **Balanced** American Balanced Fund® Moderate Allocation 07/26/1975 American Funds® Global Balanced Fund Global Moderate Allocation 02/01/2011 **Bond** Corporate Bond 12/14/2012 American Funds Corporate Bond Fund® 04/22/2016 American Funds Emerging Markets Bond **Emerging Markets Bond** Fund® American Funds Inflation Linked Bond Fund® Inflation-Protected Bond 12/14/2012 American Funds Mortgage Fund® Intermediate Government 11/01/2010 American Funds® Core Plus Bond Fund 09/25/2025 American Funds® Multi-Sector Income Fund Multisector Bond 03/22/2019 American Funds® Strategic Bond Fund Intermediate Core-Plus Bond 03/18/2016 02/19/1988 American High-Income Trust® High Yield Bond 05/28/1974 The Bond Fund of America® Intermediate Core Bond Capital World Bond Fund® Global Bond 08/04/1987 Intermediate Bond Fund of America® Short-Term Bond 02/19/1988 10/02/2006 Short-Term Bond Fund of America® Short-Term Bond U.S. Government Securities Fund® Intermediate Government 10/17/1985 

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.

All Capital Group trademarks mentioned are owned by The Capital Group Companies, Inc., an affiliated company or fund. All other company and product names mentioned are the property of their respective companies.

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 capital group.com.

For the American Funds Core Plus Bond Fund share class(es) 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.

• Class R-1 shares (expiration: 11/1/26)

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.

For Class R-1 shares of the funds listed below, the investment adviser has agreed to waive a portion of fund expenses through the date(s) listed below, without which results would have been lower and net expenses higher.

- American Funds Mortgage Fund (expiration: 11/1/2025)
- The Bond Fund of America (expiration: 3/1/2026)
- U.S. Government Securities Fund (expiration: 11/1/2025)
- Intermediate Bond Fund of America (expiration: 11/1/2025)

The investment adviser may elect at its discretion to extend, modify or terminate the waiver 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. View dates of first sale and specific expense adjustment information at capital group.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 available at the time of publication. For ClassR-1 shares of the funds listed below, expense ratios are estimated.
  - American Funds Core Plus Bond Fund

Capital Client Group, Inc.

This content, developed by Capital Group, home of American Funds, should not be used as a primary basis for investment decisions and is not intended to serve as impartial investment or fiduciary advice.

© 2025 Morningstar, Inc. All Rights Reserved. Some of the information contained herein: (1) is proprietary to Morningstar and/or its content providers; (2) may not be copied or distributed; and (3) is not warranted to be accurate, complete or timely. Neither Morningstar, its content providers nor Capital Group are responsible for any damages or losses arising from any use of this information. Past performance is no guarantee of future results. Information is calculated by Morningstar. Due to differing calculation methods, the figures shown here may differ from those calculated by Capital Group.

