

Retirement plan investments quarterly statistical update

Share Class R-1

Data as of March 31, 2025, unless otherwise noted.



CAPITAL | **AMERICAN**
GROUP® | **FUNDS®**

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 information and month-end results, visit americanfundsretirement.com.

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

The following 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

Average annual total returns

Data for periods ended 03/31/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime ¹	Expense ratio (gross/net) ²
Growth						
AMCAP Fund®	05/01/1967	1.46	13.03	9.06	10.43	1.43/1.43
American Funds® Global Insight Fund	04/01/2011	3.75	11.67	7.67	7.72	1.52/1.52
American Funds® International Vantage Fund	04/01/2011	2.27	8.83	5.26	4.95	1.62/1.62
EuroPacific Growth Fund®	04/16/1984	-0.78	8.73	4.16	8.84	1.57/1.57
The Growth Fund of America®	12/01/1973	5.96	16.32	11.67	12.60	1.38/1.38
The New Economy Fund®	12/01/1983	4.12	12.74	9.32	10.24	1.49/1.49
New Perspective Fund®	03/13/1973	4.81	14.36	9.53	11.13	1.49/1.49
New World Fund®	06/17/1999	2.19	9.61	5.24	6.60	1.66/1.66
SMALLCAP World Fund®	04/30/1990	-8.19	8.51	5.63	8.03	1.74/1.74
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	4.79	6.19	1.62	1.78	1.88/1.88
American Mutual Fund®	02/21/1950	9.11	13.62	8.74	10.49	1.35/1.35
Capital World Growth and Income Fund®	03/26/1993	4.38	12.73	7.09	9.18	1.51/1.51
Fundamental Investors®	08/01/1978	5.99	16.42	10.59	11.42	1.36/1.36
International Growth and Income Fund	10/01/2008	4.09	10.68	4.17	5.72	1.65/1.65
The Investment Company of America®	01/01/1934	8.93	17.50	10.55	11.18	1.33/1.33
Washington Mutual Investors Fund	07/31/1952	8.53	16.80	10.49	10.94	1.35/1.35
Equity-income						
Capital Income Builder®	07/30/1987	10.85	9.66	5.17	7.78	1.36/1.36
The Income Fund of America®	12/01/1973	10.39	10.56	6.26	9.55	1.36/1.36
Balanced						
American Balanced Fund®	07/26/1975	7.18	9.94	7.19	9.43	1.31/1.31
American Funds® Global Balanced Fund	02/01/2011	3.87	7.23	4.25	5.02	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

Data for periods ended 03/31/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime ¹	Expense ratio (gross/net) ²
Bond						
American Funds Corporate Bond Fund®	12/14/2012	3.90	0.01	1.77	1.98	1.42/1.41
American Funds Emerging Markets Bond Fund®	04/22/2016	3.08	3.89	–	2.73	1.63/1.63
American Funds Inflation Linked Bond Fund®	12/14/2012	5.73	0.85	1.41	0.76	1.41/1.41
American Funds Mortgage Fund®	11/01/2010	4.38	-1.09	0.42	1.00	1.44/1.39
American Funds® Multi-Sector Income Fund	03/22/2019	5.83	4.59	–	3.80	1.45/1.45
American Funds® Strategic Bond Fund	03/18/2016	4.69	-0.86	–	1.56	1.40/1.40
American High-Income Trust®	02/19/1988	7.39	7.62	4.06	6.46	1.42/1.42
The Bond Fund of America®	05/28/1974	4.05	-0.65	0.88	5.84	1.34/1.33
Capital World Bond Fund®	08/04/1987	1.31	-2.03	-0.52	4.02	1.57/1.57
Intermediate Bond Fund of America®	02/19/1988	5.08	0.24	0.79	3.26	1.35/1.32
Short-Term Bond Fund of America®	10/02/2006	4.73	0.57	0.65	0.79	1.39/1.39
U.S. Government Securities Fund®	10/17/1985	4.47	-1.55	0.39	3.95	1.37/1.33
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.98%/3.98% as of 03/31/2025]	05/01/2009	4.67	2.40	1.58	0.99	0.38/0.38
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	7.52	7.99	5.03	5.92	1.36/1.36
American Funds® Global Growth Portfolio	05/18/2012	2.23	12.35	7.60	9.36	1.52/1.52
American Funds® Growth and Income Portfolio	05/18/2012	5.77	11.84	7.47	8.78	1.42/1.42
American Funds® Growth Portfolio	05/18/2012	2.96	13.75	8.78	10.69	1.47/1.47
American Funds® Moderate Growth and Income Portfolio	05/18/2012	5.73	9.42	6.25	7.56	1.40/1.40
American Funds® Preservation Portfolio	05/18/2012	4.94	0.40	0.74	0.68	1.37/1.37
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	7.30	5.12	–	4.27	1.32/1.32
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	7.81	9.43	–	6.67	1.32/1.32
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	7.64	7.29	–	5.44	1.32/1.32
Retirement target date						
American Funds 2010 Target Date Retirement Fund®	02/01/2007	6.97	6.12	4.25	4.04	1.38/1.38
American Funds 2015 Target Date Retirement Fund®	02/01/2007	6.70	6.56	4.53	4.31	1.39/1.39
American Funds 2020 Target Date Retirement Fund®	02/01/2007	6.76	6.94	4.91	4.60	1.39/1.39
American Funds 2025 Target Date Retirement Fund®	02/01/2007	6.31	7.81	5.54	5.21	1.40/1.40
American Funds 2030 Target Date Retirement Fund®	02/01/2007	5.66	9.11	6.32	5.83	1.42/1.42
American Funds 2035 Target Date Retirement Fund®	02/01/2007	5.55	11.03	7.30	6.37	1.42/1.42
American Funds 2040 Target Date Retirement Fund®	02/01/2007	5.12	12.14	7.81	6.67	1.45/1.45
American Funds 2045 Target Date Retirement Fund®	02/01/2007	4.80	12.37	7.94	6.75	1.46/1.46
American Funds 2050 Target Date Retirement Fund®	02/01/2007	4.57	12.40	7.98	6.77	1.46/1.46
American Funds 2055 Target Date Retirement Fund®	02/01/2010	4.14	12.29	7.92	9.04	1.48/1.48
American Funds 2060 Target Date Retirement Fund®	03/27/2015	4.00	12.23	7.97	7.97	1.48/1.48
American Funds® 2065 Target Date Retirement Fund	03/27/2020	3.97	12.52	–	12.80	1.48/1.48
American Funds® 2070 Target Date Retirement Fund	05/03/2024	–	–	–	7.40	1.48/1.48

Rankings are based on the funds' 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 03/31/2025	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	893	1079	85	870	949	91	720	745	96
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	233	322	71	235	286	82	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	163	389	45	183	335	58	–	–	–
EuroPacific Growth Fund®	Foreign Large Growth	04/16/1984	248	389	63	191	335	59	171	213	81
The Growth Fund of America®	Large Growth	12/01/1973	353	1079	38	561	949	63	545	745	71
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	125	342	34	183	280	59	87	196	43
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	111	342	30	83	280	30	73	196	33
New World Fund®	Diversified Emerging Mkts	06/17/1999	551	777	72	191	636	37	65	435	14
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	131	165	78	106	137	75	45	85	50
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	436	777	58	466	636	82	403	435	93
American Mutual Fund®	Large Value	02/21/1950	238	1158	23	913	1030	88	433	808	58
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	198	322	62	193	286	72	138	191	76
Fundamental Investors®	Large Blend	08/01/1978	758	1373	57	830	1169	71	592	889	67
International Growth and Income Fund	Foreign Large Blend	10/01/2008	549	692	81	428	615	71	362	425	85
The Investment Company of America®	Large Blend	01/01/1934	163	1373	13	623	1169	55	611	889	68
Washington Mutual Investors Fund	Large Blend	07/31/1952	193	1373	15	768	1169	66	624	889	70
Equity-income											
Capital Income Builder®	Global Allocation	07/30/1987	44	349	9	132	320	40	89	243	33
The Income Fund of America®	Moderately Aggressive Allocation	12/01/1973	25	301	3	219	262	80	166	216	78
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	121	707	15	327	628	50	124	490	26
American Funds® Global Balanced Fund	Global Allocation	02/01/2011	255	349	71	272	320	84	160	243	62
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	169	177	99	154	156	100	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	223	226	100	150	205	72	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	103	147	70	121	130	89	91	107	85
American Funds Mortgage Fund®	Intermediate Government	11/01/2010	185	228	87	120	206	63	130	171	85
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	249	369	68	–	–	–	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	448	573	81	461	478	97	–	–	–
American High-Income Trust®	High Yield Bond	02/19/1988	141	618	26	109	537	23	230	423	58
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	423	462	94	328	380	87	238	276	90
Capital World Bond Fund®	Global Bond	08/04/1987	132	159	85	133	151	89	101	123	80
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	511	558	92	482	485	100	353	365	99
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	534	558	95	469	485	98	362	365	100
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	171	228	83	160	206	76	135	171	87

Investors should carefully consider investment objectives, risks, charges and expenses. This and other important information is contained in the prospectuses and summary prospectuses, 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 American Funds Strategic Bond Fund's 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 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 americanfundsretirement.com.

For the American Funds Corporate 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: 8/1/2025)

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 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 available at the time of publication. The expense ratio for American Funds® 2070 Target Date Retirement Fund is estimated.

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.