

Retirement plan investments quarterly statistical update

Share Class R-1

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



CAPITAL GROUP® | **AMERICAN 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 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		Average annual total returns				Expense ratio (gross/net) ²
Data for periods ended 12/31/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime ¹	
Growth						
AMCAP Fund®	05/01/1967	16.87	9.64	11.79	10.71	1.42/1.42
American Funds® Global Insight Fund	04/01/2011	21.66	8.31	10.31	8.71	1.51/1.51
American Funds® International Vantage Fund	04/01/2011	27.06	5.59	7.82	5.95	1.61/1.60
EUPAC Fund™	04/16/1984	27.76	3.45	7.26	9.26	1.57/1.57
The Growth Fund of America®	12/01/1973	19.00	10.95	14.26	12.93	1.37/1.37
The New Economy Fund®	12/01/1983	30.09	9.67	12.98	10.90	1.49/1.49
New Perspective Fund®	03/13/1973	20.30	8.19	11.82	11.40	1.49/1.49
New World Fund®	06/17/1999	27.21	4.47	8.69	7.31	1.66/1.66
SMALLCAP World Fund®	04/30/1990	13.19	0.68	8.04	8.44	1.74/1.74
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	33.39	2.86	6.11	3.75	1.88/1.88
American Mutual Fund®	02/21/1950	15.20	10.88	10.44	10.56	1.36/1.36
Capital World Growth and Income Fund®	03/26/1993	23.79	9.42	10.02	9.68	1.51/1.51
Fundamental Investors®	08/01/1978	23.30	13.58	13.20	11.80	1.36/1.36
International Growth and Income Fund	10/01/2008	34.05	7.54	7.67	6.84	1.64/1.64
The Investment Company of America®	01/01/1934	19.57	14.48	13.20	11.33	1.33/1.33
Washington Mutual Investors Fund	07/31/1952	16.23	13.08	12.26	11.05	1.34/1.34
Equity-income						
Capital Income Builder®	07/30/1987	19.44	8.25	7.00	7.99	1.35/1.35
The Income Fund of America®	12/01/1973	16.82	8.21	7.78	9.64	1.34/1.34
Balanced						
American Balanced Fund®	07/26/1975	17.58	8.75	8.95	9.64	1.31/1.31
American Funds® Global Balanced Fund	02/01/2011	16.27	5.07	6.16	5.71	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 12/31/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime ¹	
Bond						
American Funds Corporate Bond Fund®	12/14/2012	5.90	-1.55	2.42	2.15	1.40/1.40
American Funds Emerging Markets Bond Fund®	04/22/2016	15.21	1.54	–	3.67	1.63/1.63
American Funds Inflation Linked Bond Fund®	12/14/2012	6.04	-0.62	1.93	0.86	1.41/1.41
American Funds Mortgage Fund®	11/01/2010	7.62	-0.56	0.80	1.23	1.42/1.38
American Funds® Core Plus Bond Fund	09/25/2025	–	–	–	1.24	1.70/1.43
American Funds® Multi-Sector Income Fund	03/22/2019	7.07	2.24	–	4.22	1.45/1.45
American Funds® Strategic Bond Fund	03/18/2016	7.55	-1.83	–	1.82	1.40/1.40
American High-Income Trust®	02/19/1988	7.48	4.73	5.86	6.50	1.45/1.45
The Bond Fund of America®	05/28/1974	6.36	-1.10	1.44	5.83	1.34/1.33
Capital World Bond Fund®	08/04/1987	8.17	-3.31	0.41	4.08	1.57/1.57
Intermediate Bond Fund of America®	02/19/1988	6.03	0.32	1.24	3.29	1.34/1.31
Short-Term Bond Fund of America®	10/02/2006	4.22	0.93	1.00	0.90	1.38/1.38
U.S. Government Securities Fund®	10/17/1985	6.82	-1.04	0.80	3.97	1.36/1.33
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.44%/3.44% as of 12/31/2025]	05/01/2009	3.95	2.99	1.88	1.12	0.36/0.36
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	13.43	6.32	6.58	6.39	1.37/1.37
American Funds® Global Growth Portfolio	05/18/2012	22.17	7.32	10.51	10.68	1.52/1.52
American Funds® Growth and Income Portfolio	05/18/2012	17.35	8.68	9.62	9.63	1.42/1.42
American Funds® Growth Portfolio	05/18/2012	19.58	9.27	11.63	11.96	1.47/1.47
American Funds® Moderate Growth and Income Portfolio	05/18/2012	16.07	7.04	7.99	8.27	1.41/1.41
American Funds® Preservation Portfolio	05/18/2012	5.06	0.57	1.17	0.87	1.36/1.36
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	12.36	3.98	4.91	4.82	1.32/1.32
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	16.47	7.74	7.67	7.56	1.34/1.34
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	14.84	6.00	6.30	6.18	1.32/1.32
Retirement target date						
American Funds 2010 Target Date Retirement Fund®	02/01/2007	11.87	4.57	5.47	4.36	1.37/1.37
American Funds 2015 Target Date Retirement Fund®	02/01/2007	12.26	4.78	5.79	4.65	1.39/1.39
American Funds 2020 Target Date Retirement Fund®	02/01/2007	13.03	5.11	6.23	4.98	1.39/1.39
American Funds 2025 Target Date Retirement Fund®	02/01/2007	13.28	5.22	6.92	5.59	1.40/1.40
American Funds 2030 Target Date Retirement Fund®	02/01/2007	14.46	6.11	7.95	6.31	1.42/1.42
American Funds 2035 Target Date Retirement Fund®	02/01/2007	15.84	7.18	9.17	6.94	1.43/1.43
American Funds 2040 Target Date Retirement Fund®	02/01/2007	18.27	8.34	10.03	7.40	1.45/1.45
American Funds 2045 Target Date Retirement Fund®	02/01/2007	19.05	8.62	10.27	7.54	1.46/1.46
American Funds 2050 Target Date Retirement Fund®	02/01/2007	19.17	8.62	10.34	7.58	1.46/1.46
American Funds 2055 Target Date Retirement Fund®	02/01/2010	19.43	8.65	10.36	9.95	1.47/1.47
American Funds 2060 Target Date Retirement Fund®	03/27/2015	19.44	8.65	10.37	9.40	1.48/1.48
American Funds® 2065 Target Date Retirement Fund	03/27/2020	19.39	8.72	–	14.96	1.49/1.49
American Funds® 2070 Target Date Retirement Fund	05/03/2024	20.24	–	–	18.06	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 12/31/2025	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	420	1080	43	693	936	75	723	755	95
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	119	327	32	213	297	71	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	84	395	19	93	343	31	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	66	395	17	181	343	54	128	224	58
The Growth Fund of America®	Large Growth	12/01/1973	238	1080	25	534	936	61	555	755	70
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	21	313	3	69	271	23	40	187	20
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	83	313	23	126	271	41	82	187	39
New World Fund®	Diversified Emerging Mkts	06/17/1999	572	751	72	256	620	50	146	460	33
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	93	177	59	109	150	67	39	90	38
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	295	751	38	383	620	70	408	460	87
American Mutual Fund®	Large Value	02/21/1950	604	1107	53	680	995	68	479	832	61
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	57	327	16	171	297	60	112	199	62
Fundamental Investors®	Large Blend	08/01/1978	64	1314	5	446	1122	39	536	880	61
International Growth and Income Fund	Foreign Large Blend	10/01/2008	161	680	22	381	610	66	318	479	69
The Investment Company of America®	Large Blend	01/01/1934	158	1314	12	191	1122	18	534	880	61
Washington Mutual Investors Fund	Large Value	07/31/1952	434	1107	39	235	995	25	103	832	14
Equity-income											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	44	181	27	60	173	37	128	143	92
The Income Fund of America®	Global Moderate Allocation	12/01/1973	145	414	33	60	394	15	80	320	26
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	29	486	4	72	444	18	119	370	33
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	173	414	40	314	394	84	249	320	77
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	165	170	98	149	151	100	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	65	225	28	148	208	73	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	116	148	83	122	131	89	94	108	86
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	79	134	57	110	129	88	94	111	87
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	–	–	–	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	262	353	71	203	302	68	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	209	530	40	444	452	100	–	–	–
American High-Income Trust®	High Yield Bond	02/19/1988	425	622	71	137	548	26	140	445	36
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	398	444	90	339	374	95	238	277	89
Capital World Bond Fund®	Global Bond	08/04/1987	100	147	64	131	142	93	106	123	83
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	202	553	44	496	501	100	372	385	99
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	550	553	100	476	501	96	382	385	100
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	61	107	57	65	94	76	60	76	89

American Funds Morningstar rankings

Data for periods ended 12/31/2025	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
Portfolio series											
American Funds® Conservative Growth and Income Portfolio	Moderately Conservative Allocation	05/18/2012	40	215	9	50	199	18	51	160	27
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	22	135	8	107	125	87	39	102	36
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	58	125	27	72	118	46	52	100	38
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	19	88	3	42	87	36	14	68	4
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	78	486	9	282	444	59	228	370	60
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	479	553	88	489	501	99	377	385	99
Retirement income portfolio series											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	69	215	22	161	199	80	139	160	87
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	67	486	7	196	444	40	261	370	71
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	150	486	22	364	444	77	352	370	95
Retirement target date											
American Funds 2010 Target Date Retirement Fund®	Target-Date 2000-2010	02/01/2007	19	86	19	15	69	11	40	48	80
American Funds 2015 Target Date Retirement Fund®	Target-Date 2015	02/01/2007	34	91	30	18	77	12	49	55	85
American Funds 2020 Target Date Retirement Fund®	Target-Date 2020	02/01/2007	51	106	36	26	91	26	50	60	82
American Funds 2025 Target Date Retirement Fund®	Target-Date 2025	02/01/2007	71	137	43	68	115	67	56	82	74
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	96	194	50	84	168	54	65	114	60
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	99	189	55	97	160	61	45	115	40
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	70	187	35	93	161	58	41	114	37
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	83	184	44	121	160	78	61	115	57
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	106	187	64	130	161	83	64	114	61
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	110	184	65	133	160	86	69	114	66
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	118	184	70	131	155	87	44	69	67
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065+	03/27/2020	185	248	78	98	117	87	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2065+	05/03/2024	131	248	58	–	–	–	–	–	–

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

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. For Class R-1 shares of the funds listed below, expense ratios are estimated.
 - American Funds Core Plus Bond Fund

Effective January 1, 2026, the following funds will be renamed 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.