

# Retirement plan investments quarterly statistical update

Share Class R-2

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](http://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-2 shares	Inception date	Average annual total returns				Expense ratio (gross/net) <sup>2</sup>
		1 year	5 years	10 years	Lifetime <sup>1</sup>	
Data for periods ended 03/31/2026 (%)						
<b>Growth</b>						
AMCAP Fund®	05/01/1967	14.37	6.70	10.75	10.53	1.42/1.42
American Funds® Global Insight Fund	04/01/2011	16.29	6.62	9.83	8.18	1.53/1.53
American Funds® International Vantage Fund	04/01/2011	15.65	4.97	7.72	5.63	1.61/1.60
EUPAC Fund™	04/16/1984	20.98	2.96	7.22	9.14	1.56/1.56
The Growth Fund of America®	12/01/1973	16.90	8.56	13.59	12.72	1.38/1.38
The New Economy Fund®	12/01/1983	30.56	8.28	12.69	10.70	1.49/1.49
New Perspective Fund®	03/13/1973	16.21	6.55	11.49	11.26	1.49/1.49
New World Fund®	06/17/1999	23.24	3.98	8.53	7.20	1.66/1.66
SMALLCAP World Fund®	04/30/1990	19.88	-0.18	8.25	8.35	1.74/1.74
<b>Growth and income</b>						
American Funds® Developing World Growth and Income Fund	02/03/2014	28.40	2.38	5.63	3.73	1.86/1.86
American Mutual Fund®	02/21/1950	11.00	8.94	9.92	10.54	1.35/1.35
Capital World Growth and Income Fund®	03/26/1993	22.28	8.20	9.85	9.57	1.51/1.51
Fundamental Investors®	08/01/1978	23.11	11.42	12.75	11.68	1.37/1.37
International Growth and Income Fund	10/01/2008	26.77	6.89	7.86	6.70	1.63/1.63
The Investment Company of America®	01/01/1934	17.23	11.80	12.28	11.28	1.36/1.36
Washington Mutual Investors Fund	07/31/1952	12.21	10.52	11.69	11.00	1.35/1.35
<b>Equity-income</b>						
Capital Income Builder®	07/30/1987	15.50	7.55	6.76	7.99	1.35/1.35
The Income Fund of America®	12/01/1973	14.81	7.55	7.76	9.67	1.35/1.35
<b>Balanced</b>						
American Balanced Fund®	07/26/1975	16.51	7.69	8.64	9.60	1.33/1.33
American Funds® Global Balanced Fund	02/01/2011	14.02	4.67	5.80	5.54	1.55/1.55

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-2 shares	Average annual total returns					Expense ratio (gross/net) <sup>2</sup>
	Data for periods ended 03/31/2026 (%)	Inception date	1 year	5 years	10 years	
<b>Bond</b>						
American Funds Corporate Bond Fund®	12/14/2012	3.10	-0.59	1.85	1.98	1.40/1.40
American Funds Emerging Markets Bond Fund®	04/22/2016	9.67	2.32	–	3.32	1.57/1.57
American Funds Inflation Linked Bond Fund®	12/14/2012	1.64	-0.18	1.59	0.85	1.36/1.36
American Funds Mortgage Fund®	11/01/2010	4.15	-0.29	0.65	1.09	1.35/1.35
American Funds® Core Plus Bond Fund	09/25/2025	–	–	–	0.80	1.65/1.38
American Funds® Multi-Sector Income Fund	03/22/2019	5.03	2.32	–	3.90	1.48/1.48
American Funds® Strategic Bond Fund	03/18/2016	2.73	-1.20	1.54	1.65	1.35/1.35
American High-Income Trust®	02/19/1988	6.34	4.22	5.59	6.49	1.45/1.45
The Bond Fund of America®	05/28/1974	3.25	-0.55	1.13	5.82	1.32/1.32
Capital World Bond Fund®	08/04/1987	2.84	-2.80	-0.31	4.02	1.58/1.58
Intermediate Bond Fund of America®	02/19/1988	3.39	0.53	1.08	3.30	1.31/1.31
Short-Term Bond Fund of America®	10/02/2006	2.72	1.02	0.95	0.89	1.35/1.35
U.S. Government Securities Fund®	10/17/1985	3.13	-0.55	0.52	3.96	1.32/1.32
<b>Money market</b>						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 2.31%/2.31% as of 03/31/2026]	05/01/2009	2.72	2.36	1.29	0.76	1.39/1.39
<b>Portfolio series</b>						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	10.51	5.51	6.21	6.25	1.39/1.39
American Funds® Global Growth Portfolio	05/18/2012	20.83	5.93	10.16	10.11	1.53/1.53
American Funds® Growth and Income Portfolio	05/18/2012	15.37	7.34	9.16	9.26	1.40/1.40
American Funds® Growth Portfolio	05/18/2012	18.93	7.23	11.08	11.26	1.46/1.46
American Funds® Moderate Growth and Income Portfolio	05/18/2012	14.11	6.13	7.74	8.02	1.43/1.43
American Funds® Preservation Portfolio	05/18/2012	3.12	0.74	1.04	0.84	1.32/1.32
<b>Retirement income portfolio series</b>						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	9.25	3.80	4.74	4.84	1.27/1.27
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	14.28	6.96	7.40	7.41	1.14/1.14
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	12.21	5.60	6.21	6.26	1.24/1.24
<b>Retirement target date</b>						
American Funds 2030 Target Date Retirement Fund®	02/01/2007	11.89	5.23	7.71	6.16	1.42/1.42
American Funds 2035 Target Date Retirement Fund®	02/01/2007	13.44	6.03	8.90	6.75	1.43/1.43
American Funds 2040 Target Date Retirement Fund®	02/01/2007	16.19	6.96	9.69	7.18	1.45/1.45
American Funds 2045 Target Date Retirement Fund®	02/01/2007	16.96	7.14	9.91	7.29	1.46/1.46
American Funds 2050 Target Date Retirement Fund®	02/01/2007	17.13	7.07	9.97	7.31	1.46/1.46
American Funds 2055 Target Date Retirement Fund®	02/01/2010	17.59	7.05	9.95	9.58	1.47/1.47
American Funds 2060 Target Date Retirement Fund®	03/27/2015	17.68	7.03	9.92	8.77	1.48/1.48
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	9.02	4.15	5.19	4.32	1.37/1.37
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	9.42	4.28	5.52	4.61	1.39/1.39
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	10.03	4.51	5.96	4.91	1.39/1.39
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	10.34	4.60	6.68	5.49	1.40/1.40
American Funds® 2065 Target Date Retirement Fund	03/27/2020	17.72	7.03	–	13.40	1.48/1.48
American Funds® 2070 Target Date Retirement Fund	05/03/2024	17.72	–	–	12.64	1.50/1.50

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
<b>Growth</b>											
AMCAP Fund®	Large Growth	05/01/1967	677	1077	63	737	937	80	737	763	96
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	216	323	65	207	292	71	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	145	382	38	85	332	31	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	74	382	22	158	332	50	121	225	57
The Growth Fund of America®	Large Growth	12/01/1973	479	1077	47	534	937	60	528	763	67
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	26	314	5	59	274	18	40	193	20
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	94	314	26	119	274	38	82	193	37
New World Fund®	Diversified Emerging Mkts	06/17/1999	624	735	83	288	617	57	150	461	32
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	82	168	51	106	147	66	36	93	37
<b>Growth and income</b>											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	535	735	71	414	617	73	418	461	89
American Mutual Fund®	Large Value	02/21/1950	906	1090	82	670	983	68	595	823	74
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	64	323	21	159	292	54	116	207	61
Fundamental Investors®	Large Blend	08/01/1978	100	1312	8	374	1122	33	514	886	60
International Growth and Income Fund	Foreign Large Blend	10/01/2008	174	685	26	365	617	64	322	486	68
The Investment Company of America®	Large Blend	01/01/1934	554	1312	45	266	1122	25	608	886	68
Washington Mutual Investors Fund	Large Value	07/31/1952	787	1090	74	291	983	33	182	823	24
<b>Equity-income</b>											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	124	177	74	43	168	30	132	142	96
The Income Fund of America®	Global Moderate Allocation	12/01/1973	182	414	46	67	394	17	70	325	22
<b>Balanced</b>											
American Balanced Fund®	Moderate Allocation	07/26/1975	58	488	12	70	445	15	123	371	33
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	222	414	56	290	394	78	274	325	84
<b>Bond</b>											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	161	166	99	143	148	98	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	127	207	55	121	190	61	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	132	147	88	119	131	88	92	108	87
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	111	128	83	104	123	89	89	105	88
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	–	–	–	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	257	356	72	189	305	66	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	529	539	99	447	455	100	315	355	92
American High-Income Trust®	High Yield Bond	02/19/1988	363	612	59	164	538	31	127	437	34
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	416	444	95	350	377	97	241	279	90
Capital World Bond Fund®	Global Bond	08/04/1987	136	146	93	131	141	92	109	123	85
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	498	544	94	491	496	100	366	379	99
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	541	544	100	475	496	98	375	379	100
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	88	102	91	76	90	93	58	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
<b>Portfolio series</b>											
American Funds® Conservative Growth and Income Portfolio	Moderately Conservative Allocation	05/18/2012	92	215	37	55	199	18	60	164	32
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	35	134	21	106	124	81	50	101	46
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	83	123	54	70	117	45	62	100	48
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	24	88	12	41	87	38	13	68	4
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	157	488	28	257	445	53	225	371	58
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	521	544	97	485	496	99	370	379	100
<b>Retirement income portfolio series</b>											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	149	215	65	135	199	68	139	164	87
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	143	488	26	139	445	28	266	371	71
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	269	488	52	311	445	66	349	371	94
<b>Retirement target date</b>											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	136	194	75	96	176	59	73	115	67
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	140	189	79	105	168	67	49	116	42
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	113	187	64	101	169	63	50	115	42
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	130	184	75	122	168	77	71	116	65
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	142	187	83	138	169	86	77	115	72
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	137	184	79	147	168	90	80	115	76
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	138	184	81	149	168	91	62	82	77
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	53	86	66	20	69	18	43	50	85
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	71	91	72	25	77	24	49	56	84
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	88	106	78	35	91	37	53	61	86
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	113	137	83	73	120	69	60	83	78
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065+	03/27/2020	204	256	84	122	132	95	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2065+	05/03/2024	206	256	85	–	–	–	–	–	–

**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 Mortgage fund has plans of distribution for R-2 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](http://capitalgroup.com).

For Class R-2 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-2 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](http://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-2

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.