

# Retirement plan investments quarterly statistical update

Share Class R-3

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-3 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	14.85	7.17	11.24	10.98	0.97/0.97
American Funds® Global Insight Fund	04/01/2011	16.80	7.06	10.26	8.62	1.17/1.10
American Funds® International Vantage Fund	04/01/2011	16.19	5.33	8.11	6.04	1.25/1.19
EUPAC Fund™	04/16/1984	21.53	3.41	7.70	9.61	1.12/1.12
The Growth Fund of America®	12/01/1973	17.42	9.04	14.10	13.19	0.93/0.93
The New Economy Fund®	12/01/1983	31.15	8.76	13.19	11.16	1.05/1.05
New Perspective Fund®	03/13/1973	16.72	7.02	11.99	11.72	1.05/1.05
New World Fund®	06/17/1999	23.79	4.45	9.02	7.68	1.22/1.22
SMALLCAP World Fund®	04/30/1990	20.40	0.27	8.74	8.82	1.30/1.30
<b>Growth and income</b>						
American Funds® Developing World Growth and Income Fund	02/03/2014	29.06	2.83	6.10	4.21	1.43/1.43
American Mutual Fund®	02/21/1950	11.50	9.42	10.40	10.99	0.91/0.91
Capital World Growth and Income Fund®	03/26/1993	22.83	8.68	10.34	10.05	1.06/1.06
Fundamental Investors®	08/01/1978	23.68	11.92	13.26	12.15	0.93/0.93
International Growth and Income Fund	10/01/2008	27.34	7.36	8.34	7.19	1.18/1.18
The Investment Company of America®	01/01/1934	17.75	12.31	12.79	11.73	0.91/0.91
Washington Mutual Investors Fund	07/31/1952	12.73	11.01	12.19	11.45	0.91/0.91
<b>Equity-income</b>						
Capital Income Builder®	07/30/1987	16.02	8.04	7.24	8.45	0.91/0.91
The Income Fund of America®	12/01/1973	15.30	8.03	8.24	10.13	0.90/0.90
<b>Balanced</b>						
American Balanced Fund®	07/26/1975	17.01	8.16	9.11	10.05	0.89/0.89
American Funds® Global Balanced Fund	02/01/2011	14.52	5.12	6.26	6.00	1.11/1.11

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-3 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	3.56	-0.15	2.28	2.41	0.95/0.95
American Funds Emerging Markets Bond Fund®	04/22/2016	10.12	2.70	–	3.71	1.20/1.16
American Funds Inflation Linked Bond Fund®	12/14/2012	1.96	0.23	2.02	1.28	0.94/0.94
American Funds Mortgage Fund®	11/01/2010	4.60	0.16	1.06	1.52	0.92/0.92
American Funds® Core Plus Bond Fund	09/25/2025	–	–	–	0.53	1.25/0.98
American Funds® Multi-Sector Income Fund	03/22/2019	5.38	2.65	–	4.25	1.03/0.96
American Funds® Strategic Bond Fund	03/18/2016	3.25	-0.79	1.95	2.05	0.94/0.94
American High-Income Trust®	02/19/1988	6.81	4.68	6.06	6.93	1.01/1.01
The Bond Fund of America®	05/28/1974	3.70	-0.11	1.58	6.26	0.88/0.88
Capital World Bond Fund®	08/04/1987	3.31	-2.34	0.15	4.46	1.13/1.13
Intermediate Bond Fund of America®	02/19/1988	3.82	0.97	1.51	3.72	0.89/0.89
Short-Term Bond Fund of America®	10/02/2006	3.27	1.48	1.40	1.33	0.92/0.92
U.S. Government Securities Fund®	10/17/1985	3.57	-0.13	0.94	4.38	0.89/0.89
<b>Money market</b>						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 2.79%/2.79% as of 03/31/2026]	05/01/2009	3.18	2.70	1.57	0.92	0.95/0.95
<b>Portfolio series</b>						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	11.05	5.98	6.68	6.72	0.94/0.94
American Funds® Global Growth Portfolio	05/18/2012	21.33	6.42	10.65	10.59	1.09/1.09
American Funds® Growth and Income Portfolio	05/18/2012	15.89	7.79	9.63	9.73	0.98/0.98
American Funds® Growth Portfolio	05/18/2012	19.44	7.71	11.57	11.75	1.01/1.01
American Funds® Moderate Growth and Income Portfolio	05/18/2012	14.65	6.59	8.22	8.49	0.98/0.98
American Funds® Preservation Portfolio	05/18/2012	3.42	1.18	1.48	1.29	0.92/0.92
<b>Retirement income portfolio series</b>						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	9.67	4.18	5.06	5.14	0.96/0.95
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	14.60	7.28	7.68	7.69	0.91/0.90
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	12.57	5.98	6.55	6.60	0.92/0.92
<b>Retirement target date</b>						
American Funds 2030 Target Date Retirement Fund®	02/01/2007	12.38	5.70	8.19	6.61	0.97/0.97
American Funds 2035 Target Date Retirement Fund®	02/01/2007	13.88	6.50	9.38	7.20	0.98/0.98
American Funds 2040 Target Date Retirement Fund®	02/01/2007	16.70	7.44	10.19	7.63	1.00/1.00
American Funds 2045 Target Date Retirement Fund®	02/01/2007	17.48	7.62	10.41	7.74	1.01/1.01
American Funds 2050 Target Date Retirement Fund®	02/01/2007	17.63	7.55	10.45	7.77	1.01/1.01
American Funds 2055 Target Date Retirement Fund®	02/01/2010	18.10	7.53	10.44	10.04	1.02/1.02
American Funds 2060 Target Date Retirement Fund®	03/27/2015	18.26	7.52	10.42	9.25	1.03/1.03
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	9.58	4.64	5.66	4.76	0.92/0.92
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	9.82	4.74	5.98	5.04	0.94/0.94
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	10.58	5.00	6.44	5.35	0.94/0.94
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	10.83	5.07	7.15	5.94	0.95/0.95
American Funds® 2065 Target Date Retirement Fund	03/27/2020	18.27	7.52	–	13.91	1.03/1.03
American Funds® 2070 Target Date Retirement Fund	05/03/2024	18.22	–	–	13.08	1.03/1.03

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	649	1077	60	692	937	76	710	763	93
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	203	323	61	195	292	67	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	140	382	37	67	332	26	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	63	382	20	148	332	47	99	225	48
The Growth Fund of America®	Large Growth	12/01/1973	430	1077	44	469	937	55	435	763	57
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	22	314	5	50	274	16	26	193	15
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	84	314	24	103	274	31	67	193	28
New World Fund®	Diversified Emerging Mkts	06/17/1999	618	735	83	240	617	48	110	461	22
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	75	168	48	99	147	62	31	93	31
<b>Growth and income</b>											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	520	735	69	395	617	71	389	461	83
American Mutual Fund®	Large Value	02/21/1950	863	1090	80	547	983	57	485	823	62
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	57	323	20	138	292	47	100	207	54
Fundamental Investors®	Large Blend	08/01/1978	88	1312	7	218	1122	21	387	886	46
International Growth and Income Fund	Foreign Large Blend	10/01/2008	148	685	23	308	617	55	237	486	54
The Investment Company of America®	Large Blend	01/01/1934	392	1312	33	145	1122	14	501	886	59
Washington Mutual Investors Fund	Large Value	07/31/1952	738	1090	71	194	983	23	106	823	15
<b>Equity-income</b>											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	96	177	60	31	168	16	123	142	93
The Income Fund of America®	Global Moderate Allocation	12/01/1973	155	414	40	53	394	14	36	325	12
<b>Balanced</b>											
American Balanced Fund®	Moderate Allocation	07/26/1975	49	488	11	34	445	8	81	371	22
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	198	414	51	231	394	63	236	325	74
<b>Bond</b>											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	155	166	97	130	148	95	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	113	207	48	93	190	50	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	120	147	84	112	131	86	77	108	78
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	97	128	76	76	123	67	66	105	69
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	–	–	–	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	220	356	60	149	305	53	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	513	539	96	437	455	98	236	355	70
American High-Income Trust®	High Yield Bond	02/19/1988	257	612	41	83	538	17	63	437	16
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	380	444	88	295	377	84	177	279	70
Capital World Bond Fund®	Global Bond	08/04/1987	118	146	82	116	141	86	94	123	73
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	420	544	85	481	496	99	344	379	95
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	510	544	95	437	496	93	352	379	97
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	70	102	70	45	90	61	42	73	70

**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	64	215	26	40	199	13	35	164	19
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	28	134	15	94	124	74	25	101	21
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	72	123	48	54	117	33	48	100	38
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	22	88	12	27	87	22	11	68	3
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	122	488	22	195	445	39	173	371	46
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	495	544	94	466	496	96	346	379	96
<b>Retirement income portfolio series</b>											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	130	215	55	118	199	56	131	164	82
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	126	488	22	99	445	22	232	371	59
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	248	488	46	270	445	56	338	371	90
<b>Retirement target date</b>											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	115	194	64	48	176	35	38	115	38
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	121	189	69	65	168	41	17	116	16
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	84	187	46	62	169	39	18	115	14
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	111	184	63	94	168	60	34	116	34
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	127	187	74	110	169	71	40	115	42
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	122	184	70	119	168	76	45	115	45
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	120	184	71	123	168	78	42	82	59
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	21	86	23	9	69	4	29	50	49
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	50	91	46	9	77	4	34	56	51
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	67	106	53	11	91	5	40	61	66
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	96	137	69	32	120	34	40	83	52
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065+	03/27/2020	184	256	76	101	132	82	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2065+	05/03/2024	186	256	77	–	–	–	–	–	–

**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 Mortgage fund has plans of distribution for R-3 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-3 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.

For Class R-3 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 Emerging Markets Bond Fund (expiration: 3/1/2027)
- American Funds Global Insight Fund (expiration: 1/1/2027)
- American Funds International Vantage Fund (expiration: 1/1/2027)
- American Funds Multi-Sector Income Fund (expiration: 3/1/2027)
- American Funds Retirement Income Portfolio - Conservative (expiration: 1/1/2027)
- American Funds Retirement Income Portfolio - Enhanced (expiration: 1/1/2027)

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-3 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-3

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.

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.

© 2026 Morningstar, Inc. All rights reserved. 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. When applicable, due to differing calculation methods, the figures shown here may differ from those calculated by Capital Group.

**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.