

Retirement plan investments quarterly statistical update

Share Class R-3

Data as of March 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 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-3 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	1.92	13.53	9.55	10.92	0.98/0.98
American Funds® Global Insight Fund	04/01/2011	4.06	11.78	7.95	8.06	1.12/1.07
American Funds® International Vantage Fund	04/01/2011	2.64	9.08	5.62	5.35	1.23/1.20
EuroPacific Growth Fund®	04/16/1984	-0.33	9.22	4.64	9.34	1.12/1.12
The Growth Fund of America®	12/01/1973	6.44	16.83	12.17	13.11	0.94/0.94
The New Economy Fund®	12/01/1983	4.56	13.24	9.80	10.72	1.06/1.06
New Perspective Fund®	03/13/1973	5.26	14.86	10.02	11.63	1.06/1.06
New World Fund®	06/17/1999	2.66	10.10	5.74	7.10	1.22/1.22
SMALLCAP World Fund®	04/30/1990	-7.78	8.99	6.11	8.50	1.30/1.30
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	5.22	6.66	2.07	2.23	1.42/1.42
American Mutual Fund®	02/21/1950	9.57	14.13	9.23	10.98	0.91/0.91
Capital World Growth and Income Fund®	03/26/1993	4.83	13.23	7.57	9.67	1.06/1.06
Fundamental Investors®	08/01/1978	6.45	16.94	11.09	11.92	0.92/0.92
International Growth and Income Fund	10/01/2008	4.55	11.17	4.61	6.07	1.19/1.19
The Investment Company of America®	01/01/1934	9.40	18.01	11.03	11.67	0.91/0.91
Washington Mutual Investors Fund	07/31/1952	8.99	17.30	10.97	11.43	0.91/0.91
Equity-income						
Capital Income Builder®	07/30/1987	11.35	10.15	5.64	8.25	0.91/0.91
The Income Fund of America®	12/01/1973	10.85	11.04	6.73	10.03	0.91/0.91
Balanced						
American Balanced Fund®	07/26/1975	7.66	10.41	7.66	9.91	0.89/0.89
American Funds® Global Balanced Fund	02/01/2011	4.35	7.70	4.70	5.43	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

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	4.38	0.46	2.12	2.31	0.96/0.95
American Funds Emerging Markets Bond Fund®	04/22/2016	3.44	4.22	–	3.02	1.18/1.18
American Funds Inflation Linked Bond Fund®	12/14/2012	6.32	1.33	1.88	1.22	0.93/0.93
American Funds Mortgage Fund®	11/01/2010	4.85	-0.64	0.85	1.31	0.97/0.92
American Funds® Multi-Sector Income Fund	03/22/2019	6.24	4.81	–	4.06	0.99/0.98
American Funds® Strategic Bond Fund	03/18/2016	5.10	-0.44	–	1.92	0.95/0.95
American High-Income Trust®	02/19/1988	7.86	8.11	4.54	6.94	0.97/0.97
The Bond Fund of America®	05/28/1974	4.51	-0.20	1.34	6.31	0.90/0.89
Capital World Bond Fund®	08/04/1987	1.79	-1.58	-0.06	4.49	1.13/1.13
Intermediate Bond Fund of America®	02/19/1988	5.51	0.70	1.25	3.72	0.92/0.89
Short-Term Bond Fund of America®	10/02/2006	5.19	1.03	1.11	1.23	0.91/0.91
U.S. Government Securities Fund®	10/17/1985	4.83	-1.14	0.82	4.40	0.93/0.89
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.40%/3.40% as of 03/31/2025]	05/01/2009	4.07	2.06	1.25	0.78	0.96/0.96
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	8.02	8.48	5.52	6.40	0.92/0.92
American Funds® Global Growth Portfolio	05/18/2012	2.65	12.78	8.03	9.80	1.09/1.09
American Funds® Growth and Income Portfolio	05/18/2012	6.21	12.33	7.95	9.27	0.98/0.98
American Funds® Growth Portfolio	05/18/2012	3.42	14.26	9.27	11.17	1.01/1.01
American Funds® Moderate Growth and Income Portfolio	05/18/2012	6.18	9.89	6.72	8.03	0.99/0.99
American Funds® Preservation Portfolio	05/18/2012	5.46	0.87	1.22	1.12	0.90/0.90
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	7.58	5.53	–	4.68	0.95/0.95
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	8.29	9.92	–	6.99	0.90/0.90
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	8.20	7.86	–	5.99	0.92/0.92
Retirement target date						
American Funds 2010 Target Date Retirement Fund®	02/01/2007	7.42	6.57	4.73	4.50	0.93/0.93
American Funds 2015 Target Date Retirement Fund®	02/01/2007	7.16	7.05	5.02	4.78	0.94/0.94
American Funds 2020 Target Date Retirement Fund®	02/01/2007	7.10	7.40	5.39	5.07	0.94/0.94
American Funds 2025 Target Date Retirement Fund®	02/01/2007	6.75	8.28	6.02	5.67	0.95/0.95
American Funds 2030 Target Date Retirement Fund®	02/01/2007	6.13	9.61	6.81	6.30	0.97/0.97
American Funds 2035 Target Date Retirement Fund®	02/01/2007	5.99	11.53	7.79	6.84	0.98/0.98
American Funds 2040 Target Date Retirement Fund®	02/01/2007	5.55	12.65	8.31	7.15	1.00/1.00
American Funds 2045 Target Date Retirement Fund®	02/01/2007	5.27	12.87	8.44	7.23	1.01/1.01
American Funds 2050 Target Date Retirement Fund®	02/01/2007	5.02	12.92	8.48	7.25	1.01/1.01
American Funds 2055 Target Date Retirement Fund®	02/01/2010	4.60	12.79	8.42	9.53	1.03/1.03
American Funds 2060 Target Date Retirement Fund®	03/27/2015	4.43	12.73	8.39	8.39	1.03/1.03
American Funds® 2065 Target Date Retirement Fund	03/27/2020	4.46	12.78	–	13.06	1.03/1.03
American Funds® 2070 Target Date Retirement Fund	05/03/2024	–	–	–	6.98	1.07/1.07

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	859	1079	82	851	949	89	706	745	94
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	225	322	69	228	286	80	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	148	389	40	170	335	54	–	–	–
EuroPacific Growth Fund®	Foreign Large Growth	04/16/1984	235	389	59	161	335	52	144	213	70
The Growth Fund of America®	Large Growth	12/01/1973	305	1079	33	477	949	54	462	745	62
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	117	342	31	145	280	48	61	196	28
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	88	342	26	69	280	25	51	196	25
New World Fund®	Diversified Emerging Mkts	06/17/1999	540	777	70	156	636	32	36	435	7
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	126	165	74	100	137	70	36	85	40
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	418	777	57	435	636	77	374	435	85
American Mutual Fund®	Large Value	02/21/1950	176	1158	18	875	1030	85	297	808	42
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	161	322	55	173	286	66	119	191	68
Fundamental Investors®	Large Blend	08/01/1978	652	1373	49	737	1169	64	474	889	56
International Growth and Income Fund	Foreign Large Blend	10/01/2008	524	692	77	384	615	63	319	425	77
The Investment Company of America®	Large Blend	01/01/1934	118	1373	10	477	1169	44	491	889	58
Washington Mutual Investors Fund	Large Blend	07/31/1952	158	1373	13	665	1169	59	508	889	59
Equity-income											
Capital Income Builder®	Global Allocation	07/30/1987	37	349	7	108	320	34	52	243	20
The Income Fund of America®	Moderately Aggressive Allocation	12/01/1973	19	301	2	208	262	76	135	216	63
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	103	707	13	247	628	40	71	490	16
American Funds® Global Balanced Fund	Global Allocation	02/01/2011	222	349	63	243	320	75	126	243	48
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	153	177	93	149	156	96	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	222	226	100	121	205	59	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	42	147	29	111	130	86	72	107	76
American Funds Mortgage Fund®	Intermediate Government	11/01/2010	122	228	60	64	206	33	73	171	52
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	210	369	58	–	–	–	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	321	573	57	441	478	94	–	–	–
American High-Income Trust®	High Yield Bond	02/19/1988	75	618	13	67	537	14	110	423	31
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	355	462	83	237	380	60	158	276	60
Capital World Bond Fund®	Global Bond	08/04/1987	124	159	79	128	151	87	93	123	74
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	413	558	75	462	485	97	326	365	95
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	488	558	89	449	485	95	337	365	97
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	129	228	61	126	206	64	80	171	53

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 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 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-3 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-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 Mortgage Fund (expiration: 11/1/2025)
- The Bond Fund of America (expiration: 3/1/2026)
- American Funds Global Insight Fund (expiration: 1/1/2026)
- U.S. Government Securities Fund (expiration: 11/1/2025)
- Intermediate Bond Fund of America (expiration: 11/1/2025)
- American Funds International Vantage Fund (expiration: 1/1/2026)
- American Funds Multi-Sector Income Fund (expiration: 3/1/2026)

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-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. 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.