# Retirement plan investments quarterly statistical update

Share Class R-5

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.**

**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-5 shares** | | **Average annual total returns** | | | | |
|---|---|---|---|---|---|---|
| Data for periods ended 03/31/2026 (%) | Inception date | 1 year | 5 years | 10 years | Lifetime[1] | Expense ratio (gross/net)[2] |
| **Growth** | | | | | | |
| AMCAP Fund® | 05/01/1967 | 15.58 | 7.82 | 11.92 | 11.68 | 0.38/0.38 |
| American Funds® Global Insight Fund | 04/01/2011 | 17.51 | 7.69 | 10.88 | 9.25 | 0.51/0.51 |
| American Funds® International Vantage Fund | 04/01/2011 | 16.87 | 5.97 | 8.71 | 6.65 | 0.60/0.59 |
| EUPAC Fund™ | 04/16/1984 | 22.24 | 4.03 | 8.35 | 10.29 | 0.52/0.52 |
| The Growth Fund of America® | 12/01/1973 | 18.12 | 9.70 | 14.79 | 13.89 | 0.34/0.34 |
| The New Economy Fund® | 12/01/1983 | 31.93 | 9.41 | 13.87 | 11.86 | 0.45/0.45 |
| New Perspective Fund® | 03/13/1973 | 17.40 | 7.66 | 12.66 | 12.42 | 0.45/0.45 |
| New World Fund® | 06/17/1999 | 24.51 | 5.08 | 9.68 | 8.35 | 0.62/0.62 |
| SMALLCAP World Fund® | 04/30/1990 | 21.12 | 0.87 | 9.39 | 9.51 | 0.70/0.70 |
| **Growth and income** | | | | | | |
| American Funds® Developing World Growth and Income Fund | 02/03/2014 | 29.83 | 3.45 | 6.74 | 4.83 | 0.83/0.83 |
| American Mutual Fund® | 02/21/1950 | 12.14 | 10.07 | 11.07 | 11.68 | 0.32/0.32 |
| Capital World Growth and Income Fund® | 03/26/1993 | 23.55 | 9.33 | 11.01 | 10.73 | 0.46/0.46 |
| Fundamental Investors® | 08/01/1978 | 24.43 | 12.59 | 13.94 | 12.85 | 0.33/0.33 |
| International Growth and Income Fund | 10/01/2008 | 28.11 | 8.01 | 9.00 | 7.84 | 0.59/0.59 |
| The Investment Company of America® | 01/01/1934 | 18.48 | 12.98 | 13.46 | 12.43 | 0.32/0.32 |
| Washington Mutual Investors Fund | 07/31/1952 | 13.39 | 11.67 | 12.86 | 12.14 | 0.31/0.31 |
| **Equity-income** | | | | | | |
| Capital Income Builder® | 07/30/1987 | 16.73 | 8.69 | 7.89 | 9.11 | 0.30/0.30 |
| The Income Fund of America® | 12/01/1973 | 15.99 | 8.67 | 8.89 | 10.82 | 0.30/0.30 |
| **Balanced** | | | | | | |
| American Balanced Fund® | 07/26/1975 | 17.67 | 8.80 | 9.76 | 10.73 | 0.30/0.30 |
| American Funds® Global Balanced Fund | 02/01/2011 | 15.20 | 5.74 | 6.89 | 6.63 | 0.53/0.53 |

| Class R-5 shares | | Average annual total returns | | | | |
|---|---|---|---|---|---|---|
| Data for periods ended 03/31/2026 (%) | Inception date | 1 year | 5 years | 10 years | Lifetime[1] | Expense ratio (gross/net)[2] |
| **Bond** | | | | | | |
| American Funds Corporate Bond Fund® | 12/14/2012 | 4.09 | 0.42 | 2.85 | 3.01 | 0.37/0.37 |
| American Funds Emerging Markets Bond Fund® | 04/22/2016 | 10.76 | 3.32 | – | 4.29 | 0.57/0.57 |
| American Funds Inflation Linked Bond Fund® | 12/14/2012 | 2.64 | 0.84 | 2.62 | 1.87 | 0.34/0.34 |
| American Funds Mortgage Fund® | 11/01/2010 | 5.21 | 0.76 | 1.70 | 2.12 | 0.32/0.32 |
| American Funds® Core Plus Bond Fund | 09/25/2025 | – | – | – | 0.87 | 0.66/0.39 |
| American Funds® Multi-Sector Income Fund | 03/22/2019 | 5.96 | 3.23 | – | 4.84 | 0.42/0.42 |
| American Funds® Strategic Bond Fund | 03/18/2016 | 3.70 | -0.22 | 2.51 | 2.61 | 0.37/0.37 |
| American High-Income Trust® | 02/19/1988 | 7.44 | 5.30 | 6.69 | 7.60 | 0.42/0.42 |
| The Bond Fund of America® | 05/28/1974 | 4.32 | 0.49 | 2.19 | 6.92 | 0.28/0.28 |
| Capital World Bond Fund® | 08/04/1987 | 3.92 | -1.78 | 0.75 | 5.11 | 0.54/0.54 |
| Intermediate Bond Fund of America® | 02/19/1988 | 4.43 | 1.57 | 2.12 | 4.37 | 0.30/0.30 |
| Short-Term Bond Fund of America® | 10/02/2006 | 3.86 | 2.06 | 1.99 | 1.94 | 0.34/0.34 |
| U.S. Government Securities Fund® | 10/17/1985 | 4.26 | 0.47 | 1.57 | 5.05 | 0.30/0.30 |
| **Money market** | | | | | | |
| American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.35%/3.35% as of 03/31/2026] | 05/01/2009 | 3.79 | 3.17 | 1.98 | 1.17 | 0.35/0.35 |
| **Portfolio series** | | | | | | |
| American Funds® Conservative Growth and Income Portfolio | 05/18/2012 | 11.68 | 6.58 | 7.31 | 7.35 | 0.36/0.36 |
| American Funds® Global Growth Portfolio | 05/18/2012 | 22.03 | 7.04 | 11.31 | 11.25 | 0.50/0.50 |
| American Funds® Growth and Income Portfolio | 05/18/2012 | 16.55 | 8.44 | 10.28 | 10.38 | 0.40/0.40 |
| American Funds® Growth Portfolio | 05/18/2012 | 20.15 | 8.35 | 12.23 | 12.41 | 0.43/0.43 |
| American Funds® Moderate Growth and Income Portfolio | 05/18/2012 | 15.28 | 7.22 | 8.85 | 9.14 | 0.40/0.40 |
| American Funds® Preservation Portfolio | 05/18/2012 | 4.11 | 1.78 | 2.08 | 1.89 | 0.34/0.34 |
| **Retirement income portfolio series** | | | | | | |
| American Funds® Retirement Income Portfolio – Conservative | 08/28/2015 | 10.29 | 4.76 | 5.64 | 5.69 | 0.36/0.36 |
| American Funds® Retirement Income Portfolio – Enhanced | 08/28/2015 | 15.21 | 7.83 | 8.22 | 8.21 | 0.38/0.38 |
| American Funds® Retirement Income Portfolio – Moderate | 08/28/2015 | 13.17 | 6.50 | 7.01 | 7.03 | 0.36/0.36 |
| **Retirement target date** | | | | | | |
| American Funds 2030 Target Date Retirement Fund® | 02/01/2007 | 13.05 | 6.33 | 8.84 | 7.26 | 0.38/0.38 |
| American Funds 2035 Target Date Retirement Fund® | 02/01/2007 | 14.61 | 7.15 | 10.04 | 7.86 | 0.39/0.39 |
| American Funds 2040 Target Date Retirement Fund® | 02/01/2007 | 17.39 | 8.09 | 10.85 | 8.29 | 0.41/0.41 |
| American Funds 2045 Target Date Retirement Fund® | 02/01/2007 | 18.21 | 8.26 | 11.07 | 8.40 | 0.42/0.42 |
| American Funds 2050 Target Date Retirement Fund® | 02/01/2007 | 18.35 | 8.20 | 11.12 | 8.43 | 0.42/0.42 |
| American Funds 2055 Target Date Retirement Fund® | 02/01/2010 | 18.82 | 8.17 | 11.11 | 10.71 | 0.43/0.43 |
| American Funds 2060 Target Date Retirement Fund® | 03/27/2015 | 18.93 | 8.16 | 11.08 | 9.90 | 0.44/0.44 |
| American Funds® 2010 Target Date Retirement Income Fund | 02/01/2007 | 10.27 | 5.27 | 6.30 | 5.41 | 0.33/0.33 |
| American Funds® 2015 Target Date Retirement Income Fund | 02/01/2007 | 10.50 | 5.37 | 6.62 | 5.68 | 0.35/0.35 |
| American Funds® 2020 Target Date Retirement Income Fund | 02/01/2007 | 11.26 | 5.62 | 7.08 | 5.99 | 0.35/0.35 |
| American Funds® 2025 Target Date Retirement Income Fund | 02/01/2007 | 11.57 | 5.71 | 7.80 | 6.59 | 0.36/0.36 |
| American Funds® 2065 Target Date Retirement Fund | 03/27/2020 | 18.87 | 8.15 | – | 14.58 | 0.44/0.44 |
| American Funds® 2070 Target Date Retirement Fund | 05/03/2024 | 18.95 | – | – | 13.78 | 0.44/0.44 |

**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**

| | | | 1 year | | | 5 years | | | 10 years | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Data for periods ended 03/31/2026 | Morningstar category | Inception date | 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 | 592 | 1077 | 56 | 634 | 937 | 71 | 678 | 763 | 88 |
| American Funds® Global Insight Fund | Global Large-Stock Blend | 04/01/2011 | 186 | 323 | 58 | 177 | 292 | 62 | – | – | – |
| American Funds® International Vantage Fund | Foreign Large Growth | 04/01/2011 | 122 | 382 | 36 | 45 | 332 | 21 | – | – | – |
| EUPAC Fund™ | Foreign Large Growth | 04/16/1984 | 48 | 382 | 17 | 121 | 332 | 40 | 67 | 225 | 37 |
| The Growth Fund of America® | Large Growth | 12/01/1973 | 360 | 1077 | 39 | 364 | 937 | 45 | 307 | 763 | 43 |
| The New Economy Fund® | Global Large-Stock Growth | 12/01/1983 | 11 | 314 | 4 | 25 | 274 | 10 | 12 | 193 | 10 |
| New Perspective Fund® | Global Large-Stock Growth | 03/13/1973 | 70 | 314 | 22 | 81 | 274 | 25 | 43 | 193 | 20 |
| New World Fund® | Diversified Emerging Mkts | 06/17/1999 | 601 | 735 | 81 | 178 | 617 | 38 | 55 | 461 | 12 |
| SMALLCAP World Fund® | Global Small/Mid Stock | 04/30/1990 | 62 | 168 | 46 | 79 | 147 | 55 | 20 | 93 | 26 |
| **Growth and income** | | | | | | | | | | | |
| American Funds® Developing World Growth and Income Fund | Diversified Emerging Mkts | 02/03/2014 | 486 | 735 | 66 | 352 | 617 | 66 | 340 | 461 | 75 |
| American Mutual Fund® | Large Value | 02/21/1950 | 802 | 1090 | 75 | 387 | 983 | 42 | 312 | 823 | 42 |
| Capital World Growth and Income Fund® | Global Large-Stock Blend | 03/26/1993 | 37 | 323 | 14 | 94 | 292 | 37 | 56 | 207 | 32 |
| Fundamental Investors® | Large Blend | 08/01/1978 | 72 | 1312 | 6 | 110 | 1122 | 11 | 156 | 886 | 22 |
| International Growth and Income Fund | Foreign Large Blend | 10/01/2008 | 100 | 685 | 17 | 212 | 617 | 39 | 125 | 486 | 28 |
| The Investment Company of America® | Large Blend | 01/01/1934 | 298 | 1312 | 25 | 74 | 1122 | 8 | 329 | 886 | 40 |
| Washington Mutual Investors Fund | Large Value | 07/31/1952 | 678 | 1090 | 65 | 92 | 983 | 12 | 48 | 823 | 8 |
| **Equity-income** | | | | | | | | | | | |
| Capital Income Builder® | Global Moderately Aggressive Allocation | 07/30/1987 | 60 | 177 | 43 | 17 | 168 | 10 | 93 | 142 | 79 |
| The Income Fund of America® | Global Moderate Allocation | 12/01/1973 | 118 | 414 | 32 | 30 | 394 | 8 | 10 | 325 | 3 |
| **Balanced** | | | | | | | | | | | |
| American Balanced Fund® | Moderate Allocation | 07/26/1975 | 28 | 488 | 9 | 12 | 445 | 4 | 26 | 371 | 10 |
| American Funds® Global Balanced Fund | Global Moderate Allocation | 02/01/2011 | 160 | 414 | 41 | 158 | 394 | 45 | 171 | 325 | 56 |
| **Bond** | | | | | | | | | | | |
| American Funds Corporate Bond Fund® | Corporate Bond | 12/14/2012 | 130 | 166 | 89 | 103 | 148 | 83 | – | – | – |
| American Funds Emerging Markets Bond Fund® | Emerging Markets Bond | 04/22/2016 | 80 | 207 | 38 | 53 | 190 | 31 | – | – | – |
| American Funds Inflation Linked Bond Fund® | Inflation-Protected Bond | 12/14/2012 | 78 | 147 | 69 | 81 | 131 | 74 | 26 | 108 | 29 |
| American Funds Mortgage Fund® | Government Mortgage-Backed Bond | 11/01/2010 | 57 | 128 | 55 | 26 | 123 | 25 | 9 | 105 | 7 |
| American Funds® Core Plus Bond Fund | Intermediate Core-Plus Bond | 09/25/2025 | – | – | – | – | – | – | – | – | – |
| American Funds® Multi-Sector Income Fund | Multisector Bond | 03/22/2019 | 142 | 356 | 39 | 66 | 305 | 29 | – | – | – |
| American Funds® Strategic Bond Fund | Intermediate Core-Plus Bond | 03/18/2016 | 468 | 539 | 90 | 391 | 455 | 92 | 101 | 355 | 32 |
| American High-Income Trust® | High Yield Bond | 02/19/1988 | 115 | 612 | 19 | 19 | 538 | 3 | 20 | 437 | 6 |
| The Bond Fund of America® | Intermediate Core Bond | 05/28/1974 | 192 | 444 | 47 | 86 | 377 | 27 | 28 | 279 | 12 |
| Capital World Bond Fund® | Global Bond | 08/04/1987 | 87 | 146 | 66 | 84 | 141 | 69 | 65 | 123 | 53 |
| Intermediate Bond Fund of America® | Short-Term Bond | 02/19/1988 | 197 | 544 | 44 | 423 | 496 | 91 | 233 | 379 | 71 |
| Short-Term Bond Fund of America® | Short-Term Bond | 10/02/2006 | 410 | 544 | 84 | 292 | 496 | 68 | 270 | 379 | 80 |
| U.S. Government Securities Fund® | Intermediate Government | 10/17/1985 | 12 | 102 | 9 | 12 | 90 | 19 | 4 | 73 | 3 |

**American Funds Morningstar rankings**

| Data for periods ended 03/31/2026 | Morningstar category | Inception date | 1 year Rank | 1 year Funds in category | 1 year Peer group percentile | 5 years Rank | 5 years Funds in category | 5 years Peer group percentile | 10 years Rank | 10 years Funds in category | 10 years Peer group percentile |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **Portfolio series** | | | | | | | | | | | |
| American Funds® Conservative Growth and Income Portfolio | Moderately Conservative Allocation | 05/18/2012 | 40 | 215 | 17 | 12 | 199 | 3 | 18 | 164 | 14 |
| American Funds® Global Growth Portfolio | Global Aggressive Allocation | 05/18/2012 | 16 | 134 | 12 | 68 | 124 | 61 | 5 | 101 | 4 |
| American Funds® Growth and Income Portfolio | Moderately Aggressive Allocation | 05/18/2012 | 54 | 123 | 40 | 28 | 117 | 22 | 21 | 100 | 23 |
| American Funds® Growth Portfolio | Aggressive Allocation | 05/18/2012 | 9 | 88 | 9 | 7 | 87 | 4 | 2 | 68 | 1 |
| American Funds® Moderate Growth and Income Portfolio | Moderate Allocation | 05/18/2012 | 85 | 488 | 17 | 109 | 445 | 23 | 103 | 371 | 28 |
| American Funds® Preservation Portfolio | Short-Term Bond | 05/18/2012 | 336 | 544 | 69 | 361 | 496 | 79 | 242 | 379 | 74 |
| **Retirement income portfolio series** | | | | | | | | | | | |
| American Funds® Retirement Income Portfolio – Conservative | Moderately Conservative Allocation | 08/28/2015 | 101 | 215 | 42 | 81 | 199 | 32 | 91 | 164 | 50 |
| American Funds® Retirement Income Portfolio – Enhanced | Moderate Allocation | 08/28/2015 | 92 | 488 | 18 | 52 | 445 | 12 | 172 | 371 | 46 |
| American Funds® Retirement Income Portfolio – Moderate | Moderate Allocation | 08/28/2015 | 207 | 488 | 38 | 209 | 445 | 43 | 311 | 371 | 84 |
| **Retirement target date** | | | | | | | | | | | |
| American Funds 2030 Target Date Retirement Fund® | Target-Date 2030 | 02/01/2007 | 81 | 194 | 45 | 5 | 176 | 4 | 3 | 115 | 2 |
| American Funds 2035 Target Date Retirement Fund® | Target-Date 2035 | 02/01/2007 | 90 | 189 | 52 | 11 | 168 | 6 | 2 | 116 | 1 |
| American Funds 2040 Target Date Retirement Fund® | Target-Date 2040 | 02/01/2007 | 51 | 187 | 28 | 15 | 169 | 11 | 3 | 115 | 1 |
| American Funds 2045 Target Date Retirement Fund® | Target-Date 2045 | 02/01/2007 | 76 | 184 | 45 | 42 | 168 | 27 | 3 | 116 | 1 |
| American Funds 2050 Target Date Retirement Fund® | Target-Date 2050 | 02/01/2007 | 103 | 187 | 65 | 70 | 169 | 51 | 6 | 115 | 6 |
| American Funds 2055 Target Date Retirement Fund® | Target-Date 2055 | 02/01/2010 | 99 | 184 | 61 | 74 | 168 | 53 | 10 | 115 | 9 |
| American Funds 2060 Target Date Retirement Fund® | Target-Date 2060 | 03/27/2015 | 101 | 184 | 64 | 75 | 168 | 54 | 10 | 82 | 13 |
| American Funds® 2010 Target Date Retirement Income Fund | Target-Date 2000-2010 | 02/01/2007 | 4 | 86 | 4 | 3 | 69 | 1 | 3 | 50 | 2 |
| American Funds® 2015 Target Date Retirement Income Fund | Target-Date 2015 | 02/01/2007 | 23 | 91 | 24 | 3 | 77 | 1 | 4 | 56 | 3 |
| American Funds® 2020 Target Date Retirement Income Fund | Target-Date 2020 | 02/01/2007 | 40 | 106 | 32 | 3 | 91 | 1 | 5 | 61 | 9 |
| American Funds® 2025 Target Date Retirement Income Fund | Target-Date 2025 | 02/01/2007 | 69 | 137 | 48 | 3 | 120 | 1 | 6 | 83 | 9 |
| American Funds® 2065 Target Date Retirement Fund | Target-Date 2065+ | 03/27/2020 | 160 | 256 | 71 | 68 | 132 | 61 | – | – | – |
| American Funds® 2070 Target Date Retirement Fund | Target-Date 2065+ | 05/03/2024 | 155 | 256 | 70 | – | – | – | – | – | – |

**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.



Investment results assume all distributions are reinvested and reflect applicable fees and expenses.

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 Class R-5 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-5 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.

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-5

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.

**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.

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