

# Retirement plan investments quarterly statistical update

Share Class R-2E

Data as of June 30, 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](https://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-2E shares		Average annual total returns				Expense ratio (gross/net) <sup>2</sup>
Data for periods ended 06/30/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime <sup>1</sup>	
<b>Growth</b>						
AMCAP Fund®	05/01/1967	14.93	11.93	10.79	11.05	1.13/1.13
American Funds® Global Insight Fund	04/01/2011	15.92	10.85	9.11	8.71	1.24/1.24
American Funds® International Vantage Fund	04/01/2011	16.22	8.58	6.65	6.02	1.33/1.33
EUPAC Fund™	04/16/1984	12.95	7.30	5.68	9.48	1.27/1.27
The Growth Fund of America®	12/01/1973	20.81	15.13	13.72	13.28	1.09/1.09
The New Economy Fund®	12/01/1983	17.74	11.74	10.99	10.99	1.21/1.21
New Perspective Fund®	03/13/1973	17.15	12.93	11.29	11.76	1.21/1.21
New World Fund®	06/17/1999	14.61	7.95	6.97	7.44	1.37/1.37
SMALLCAP World Fund®	04/30/1990	9.07	5.89	6.83	8.80	1.45/1.45
<b>Growth and income</b>						
American Funds® Developing World Growth and Income Fund	02/03/2014	18.82	5.29	3.28	3.15	1.56/1.56
American Mutual Fund®	02/21/1950	15.38	12.50	9.82	10.95	1.07/1.07
Capital World Growth and Income Fund®	03/26/1993	16.44	12.03	8.70	9.90	1.21/1.21
Fundamental Investors®	08/01/1978	19.25	16.01	12.38	12.07	1.07/1.07
International Growth and Income Fund	10/01/2008	17.82	10.46	5.68	6.61	1.34/1.34
The Investment Company of America®	01/01/1934	20.23	16.82	12.32	11.70	1.06/1.06
Washington Mutual Investors Fund	07/31/1952	15.97	15.52	11.88	11.39	1.06/1.06
<b>Equity-income</b>						
Capital Income Builder®	07/30/1987	17.86	9.44	6.23	8.27	1.07/1.07
The Income Fund of America®	12/01/1973	16.89	10.03	7.30	9.98	1.07/1.07
<b>Balanced</b>						
American Balanced Fund®	07/26/1975	13.72	9.53	8.42	9.89	1.04/1.04
American Funds® Global Balanced Fund	02/01/2011	11.68	6.66	5.39	5.75	1.28/1.28

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-2E shares		Average annual total returns				Expense ratio (gross/net) <sup>2</sup>
Data for periods ended 06/30/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime <sup>1</sup>	
<b>Bond</b>						
American Funds Corporate Bond Fund®	12/14/2012	5.85	-1.15	2.49	2.33	1.12/1.11
American Funds Emerging Markets Bond Fund®	04/22/2016	10.50	2.92	–	3.65	1.30/1.30
American Funds Inflation Linked Bond Fund®	12/14/2012	5.77	0.24	1.90	1.13	1.10/1.10
American Funds Mortgage Fund®	11/01/2010	6.36	-0.69	1.04	1.33	1.10/1.05
American Funds® Multi-Sector Income Fund	03/22/2019	7.95	4.01	–	4.60	1.18/1.18
American Funds® Strategic Bond Fund	03/18/2016	6.53	-1.46	–	2.06	1.12/1.12
American High-Income Trust®	02/19/1988	9.34	6.82	4.77	6.87	1.12/1.12
The Bond Fund of America®	05/28/1974	5.62	-0.90	1.50	6.21	1.05/1.04
Capital World Bond Fund®	08/04/1987	8.38	-1.75	0.54	4.50	1.29/1.29
Intermediate Bond Fund of America®	02/19/1988	6.45	0.37	1.31	3.62	1.07/1.04
Short-Term Bond Fund of America®	10/02/2006	5.69	0.93	1.09	1.16	1.05/1.05
U.S. Government Securities Fund®	10/17/1985	6.13	-1.20	0.94	4.30	1.09/1.05
<b>Money market</b>						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.19%/3.19% as of 06/30/2025]	05/01/2009	3.64	2.14	1.25	0.77	1.11/1.11
<b>Portfolio series</b>						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	12.77	7.59	6.05	6.60	1.10/1.10
American Funds® Global Growth Portfolio	05/18/2012	15.94	11.03	9.35	10.71	1.25/1.25
American Funds® Growth and Income Portfolio	05/18/2012	15.27	11.00	8.89	9.80	1.14/1.14
American Funds® Growth Portfolio	05/18/2012	17.10	12.68	10.52	12.08	1.17/1.17
American Funds® Moderate Growth and Income Portfolio	05/18/2012	13.31	8.78	7.47	8.40	1.15/1.15
American Funds® Preservation Portfolio	05/18/2012	5.99	0.59	1.26	1.10	1.16/1.12
<b>Retirement income portfolio series</b>						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	11.43	4.91	–	5.16	1.08/1.08
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	14.50	9.05	–	7.56	1.11/1.11
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	13.29	7.17	–	6.45	1.09/1.09
<b>Retirement target date</b>						
American Funds 2010 Target Date Retirement Fund®	02/01/2007	11.20	5.67	5.12	4.57	1.09/1.09
American Funds 2015 Target Date Retirement Fund®	02/01/2007	11.34	6.08	5.43	4.85	1.10/1.10
American Funds 2020 Target Date Retirement Fund®	02/01/2007	11.84	6.42	5.84	5.18	1.10/1.10
American Funds 2025 Target Date Retirement Fund®	02/01/2007	11.84	6.92	6.49	5.80	1.11/1.11
American Funds 2030 Target Date Retirement Fund®	02/01/2007	12.63	8.19	7.38	6.50	1.13/1.13
American Funds 2035 Target Date Retirement Fund®	02/01/2007	13.77	9.77	8.49	7.12	1.14/1.14
American Funds 2040 Target Date Retirement Fund®	02/01/2007	15.23	11.05	9.21	7.54	1.16/1.16
American Funds 2045 Target Date Retirement Fund®	02/01/2007	15.62	11.33	9.41	7.66	1.17/1.17
American Funds 2050 Target Date Retirement Fund®	02/01/2007	15.61	11.37	9.48	7.69	1.17/1.17
American Funds 2055 Target Date Retirement Fund®	02/01/2010	15.56	11.35	9.48	10.10	1.19/1.19
American Funds 2060 Target Date Retirement Fund®	03/27/2015	15.59	11.34	9.50	9.33	1.18/1.18
American Funds® 2065 Target Date Retirement Fund	03/27/2020	15.56	11.36	–	14.82	1.18/1.18
American Funds® 2070 Target Date Retirement Fund	05/03/2024	15.68	–	–	17.40	1.21/1.21

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 06/30/2025	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
<b>Growth</b>											
AMCAP Fund®	Large Growth	05/01/1967	626	1084	57	813	954	84	717	754	94
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	100	334	28	225	297	77	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	159	388	44	122	333	43	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	223	388	56	180	333	56	151	219	71
The Growth Fund of America®	Large Growth	12/01/1973	180	1084	16	438	954	51	509	754	65
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	82	338	25	134	285	43	69	193	34
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	94	338	25	72	285	26	56	193	27
New World Fund®	Diversified Emerging Mkts	06/17/1999	328	769	41	196	629	39	41	453	8
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	102	170	60	112	145	76	40	88	42
<b>Growth and income</b>											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	80	769	10	411	629	75	379	453	84
American Mutual Fund®	Large Value	02/21/1950	165	1140	16	794	1023	77	267	821	37
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	76	334	21	157	297	59	118	200	65
Fundamental Investors®	Large Blend	08/01/1978	82	1354	5	471	1161	41	430	894	50
International Growth and Income Fund	Foreign Large Blend	10/01/2008	414	693	61	336	622	57	322	448	75
The Investment Company of America®	Large Blend	01/01/1934	55	1354	4	183	1161	16	451	894	52
Washington Mutual Investors Fund	Large Blend	07/31/1952	209	1354	14	602	1161	52	567	894	61
<b>Equity-income</b>											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	29	197	10	128	181	75	118	148	83
The Income Fund of America®	Global Moderate Allocation	12/01/1973	24	461	4	54	431	13	35	324	7
<b>Balanced</b>											
American Balanced Fund®	Moderate Allocation	07/26/1975	34	453	7	151	404	37	76	333	25
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	212	461	38	363	431	85	208	324	61
<b>Bond</b>											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	166	178	97	151	155	100	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	86	226	40	74	206	40	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	79	151	51	116	130	88	76	107	75
American Funds Mortgage Fund®	Intermediate Government	11/01/2010	67	227	31	75	208	41	78	171	54
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	177	371	45	89	303	36	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	219	575	41	462	480	97	–	–	–
American High-Income Trust®	High Yield Bond	02/19/1988	242	622	44	59	547	11	140	429	39
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	355	456	82	283	377	78	187	282	69
Capital World Bond Fund®	Global Bond	08/04/1987	104	159	60	137	152	91	98	125	76
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	248	556	49	470	484	98	339	371	96
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	482	556	87	444	484	94	355	371	99
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	92	227	43	135	208	68	97	171	66

**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, 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 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.

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](http://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-2E 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-2E 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)
- U.S. Government Securities Fund (expiration: 11/1/2025)
- Intermediate Bond Fund of America (expiration: 11/1/2025)

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-2E shares were first offered on 8/29/2014.

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](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.

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.