

Retirement plan investments quarterly statistical update

Share Class R-5E

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-5E shares	Inception date	Average annual total returns				Expense ratio (gross/net) ²
		1 year	5 years	10 years	Lifetime ¹	
Data for periods ended 03/31/2026 (%)						
Growth						
AMCAP Fund®	05/01/1967	15.45	7.71	11.81	11.59	0.47/0.47
American Funds® Global Insight Fund	04/01/2011	17.41	7.58	10.78	9.15	0.71/0.60
American Funds® International Vantage Fund	04/01/2011	16.76	5.86	8.61	6.55	0.75/0.69
EUPAC Fund™	04/16/1984	22.14	3.92	8.23	10.19	0.62/0.62
The Growth Fund of America®	12/01/1973	18.01	9.58	14.67	13.76	0.44/0.44
The New Economy Fund®	12/01/1983	31.80	9.30	13.76	11.75	0.55/0.55
New Perspective Fund®	03/13/1973	17.29	7.56	12.54	12.31	0.55/0.55
New World Fund®	06/17/1999	24.42	4.98	9.56	8.25	0.72/0.72
SMALLCAP World Fund®	04/30/1990	21.00	0.77	9.28	9.40	0.80/0.80
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	29.59	3.34	6.64	4.73	0.94/0.92
American Mutual Fund®	02/21/1950	12.05	9.97	10.96	11.61	0.42/0.42
Capital World Growth and Income Fund®	03/26/1993	23.43	9.22	10.89	10.63	0.56/0.56
Fundamental Investors®	08/01/1978	24.30	12.48	13.82	12.73	0.43/0.43
International Growth and Income Fund	10/01/2008	28.01	7.90	8.89	7.73	0.69/0.69
The Investment Company of America®	01/01/1934	18.37	12.87	13.35	12.34	0.41/0.41
Washington Mutual Investors Fund	07/31/1952	13.28	11.56	12.75	12.02	0.41/0.41
Equity-income						
Capital Income Builder®	07/30/1987	16.61	8.57	7.77	9.03	0.41/0.41
The Income Fund of America®	12/01/1973	15.90	8.57	8.78	10.71	0.41/0.41
Balanced						
American Balanced Fund®	07/26/1975	17.58	8.70	9.65	10.60	0.39/0.39
American Funds® Global Balanced Fund	02/01/2011	15.08	5.64	6.79	6.52	0.63/0.63

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-5E shares	Average annual total returns					Expense ratio (gross/net) ²
	Data for periods ended 03/31/2026 (%)	Inception date	1 year	5 years	10 years	
Bond						
American Funds Corporate Bond Fund®	12/14/2012	4.05	0.33	2.78	2.99	0.47/0.47
American Funds Emerging Markets Bond Fund®	04/22/2016	10.69	3.29	–	4.30	0.73/0.69
American Funds Inflation Linked Bond Fund®	12/14/2012	2.47	0.73	2.51	1.83	0.44/0.44
American Funds Mortgage Fund®	11/01/2010	5.11	0.66	1.61	2.05	0.46/0.42
American Funds® Core Plus Bond Fund	09/25/2025	–	–	–	0.78	0.76/0.49
American Funds® Multi-Sector Income Fund	03/22/2019	5.86	3.12	–	4.73	0.56/0.50
American Funds® Strategic Bond Fund	03/18/2016	3.72	-0.30	2.43	2.54	0.47/0.47
American High-Income Trust®	02/19/1988	7.33	5.20	6.59	7.52	0.51/0.51
The Bond Fund of America®	05/28/1974	4.22	0.39	2.09	6.85	0.38/0.38
Capital World Bond Fund®	08/04/1987	3.80	-1.87	0.63	5.00	0.64/0.64
Intermediate Bond Fund of America®	02/19/1988	4.32	1.46	2.02	4.27	0.40/0.40
Short-Term Bond Fund of America®	10/02/2006	3.76	1.96	1.90	1.83	0.44/0.44
U.S. Government Securities Fund®	10/17/1985	4.08	0.37	1.47	4.95	0.40/0.40
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.25%/3.25% as of 03/31/2026]	05/01/2009	3.70	3.10	1.91	1.12	0.45/0.45
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	11.54	6.48	7.20	7.24	0.46/0.46
American Funds® Global Growth Portfolio	05/18/2012	21.96	6.94	11.22	11.15	0.59/0.59
American Funds® Growth and Income Portfolio	05/18/2012	16.47	8.34	10.18	10.27	0.48/0.48
American Funds® Growth Portfolio	05/18/2012	20.05	8.26	12.13	12.30	0.51/0.51
American Funds® Moderate Growth and Income Portfolio	05/18/2012	15.22	7.12	8.74	9.02	0.49/0.49
American Funds® Preservation Portfolio	05/18/2012	4.01	1.66	1.97	1.78	0.43/0.43
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	10.20	4.72	5.58	5.65	0.39/0.39
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	15.12	7.72	8.15	8.15	0.45/0.45
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	13.08	6.40	6.98	7.00	0.50/0.47
Retirement target date						
American Funds 2030 Target Date Retirement Fund®	02/01/2007	12.96	6.24	8.74	7.15	0.47/0.47
American Funds 2035 Target Date Retirement Fund®	02/01/2007	14.50	7.04	9.94	7.75	0.48/0.48
American Funds 2040 Target Date Retirement Fund®	02/01/2007	17.29	7.98	10.75	8.18	0.50/0.50
American Funds 2045 Target Date Retirement Fund®	02/01/2007	18.07	8.16	10.96	8.29	0.51/0.51
American Funds 2050 Target Date Retirement Fund®	02/01/2007	18.23	8.08	11.01	8.31	0.51/0.51
American Funds 2055 Target Date Retirement Fund®	02/01/2010	18.68	8.07	11.00	10.60	0.52/0.52
American Funds 2060 Target Date Retirement Fund®	03/27/2015	18.79	8.05	10.98	9.80	0.53/0.53
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	10.09	5.15	6.20	5.29	0.42/0.42
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	10.37	5.26	6.52	5.57	0.44/0.44
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	11.15	5.51	6.98	5.88	0.44/0.44
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	11.41	5.60	7.70	6.47	0.45/0.45
American Funds® 2065 Target Date Retirement Fund	03/27/2020	18.82	8.05	–	14.48	0.53/0.53
American Funds® 2070 Target Date Retirement Fund	05/03/2024	18.92	–	–	13.69	0.53/0.53

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
Growth											
AMCAP Fund®	Large Growth	05/01/1967	606	1077	57	652	937	73	685	763	89
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	191	323	59	181	292	62	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	128	382	37	52	332	21	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	51	382	17	132	332	43	76	225	39
The Growth Fund of America®	Large Growth	12/01/1973	370	1077	40	387	937	46	335	763	46
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	15	314	4	30	274	10	14	193	11
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	73	314	22	91	274	28	49	193	22
New World Fund®	Diversified Emerging Mkts	06/17/1999	607	735	82	191	617	40	61	461	13
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	68	168	47	84	147	56	22	93	26
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	499	735	67	358	617	66	346	461	76
American Mutual Fund®	Large Value	02/21/1950	807	1090	75	421	983	45	347	823	47
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	41	323	15	107	292	41	62	207	35
Fundamental Investors®	Large Blend	08/01/1978	76	1312	6	125	1122	11	203	886	27
International Growth and Income Fund	Foreign Large Blend	10/01/2008	103	685	17	228	617	42	139	486	31
The Investment Company of America®	Large Blend	01/01/1934	306	1312	26	83	1122	8	356	886	43
Washington Mutual Investors Fund	Large Value	07/31/1952	689	1090	66	102	983	13	54	823	9
Equity-income											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	75	177	50	21	168	11	96	142	80
The Income Fund of America®	Global Moderate Allocation	12/01/1973	127	414	34	37	394	10	15	325	4
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	33	488	9	16	445	4	34	371	12
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	170	414	44	167	394	47	179	325	57
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	132	166	90	113	148	89	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	86	207	40	54	190	31	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	91	147	72	94	131	79	38	108	47
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	66	128	59	31	123	27	17	105	18
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	–	–	–	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	160	356	43	86	305	36	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	461	539	89	404	455	94	119	355	38
American High-Income Trust®	High Yield Bond	02/19/1988	133	612	21	29	538	5	26	437	7
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	234	444	58	120	377	35	47	279	19
Capital World Bond Fund®	Global Bond	08/04/1987	93	146	69	90	141	71	71	123	56
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	251	544	56	440	496	93	260	379	78
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	432	544	86	317	496	72	293	379	85
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	31	102	31	18	90	24	6	73	4

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
Portfolio series											
American Funds® Conservative Growth and Income Portfolio	Moderately Conservative Allocation	05/18/2012	46	215	18	20	199	5	22	164	15
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	19	134	13	72	124	61	8	101	8
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	59	123	42	34	117	24	26	100	25
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	14	88	10	11	87	4	4	68	1
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	91	488	18	124	445	25	113	371	31
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	368	544	77	399	496	86	274	379	81
Retirement income portfolio series											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	110	215	48	85	199	34	96	164	52
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	96	488	18	61	445	13	180	371	47
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	211	488	38	221	445	45	312	371	85
Retirement target date											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	84	194	46	10	176	9	6	115	6
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	99	189	57	16	168	10	5	116	4
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	55	187	31	20	169	12	5	115	2
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	85	184	48	52	168	37	6	116	2
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	110	187	67	78	169	55	10	115	8
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	104	184	63	82	168	57	14	115	12
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	107	184	66	85	168	60	12	82	14
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	8	86	8	5	69	2	5	50	3
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	28	91	27	5	77	2	6	56	4
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	46	106	35	5	91	2	10	61	14
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	75	137	51	5	120	2	12	83	14
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065+	03/27/2020	163	256	71	73	132	63	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2065+	05/03/2024	157	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.

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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 capitalgroup.com.

For Class R-5E 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-5E 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: 11/1/2026)
- American Funds Developing World Growth and Income Fund (expiration: 2/1/2027)
- 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 - Moderate (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-5E shares were first offered on 11/20/2015.

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-5E

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.