

# Retirement plan investments quarterly statistical update

Share Class R-5E

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](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-5E shares

## Average annual total returns

Data for periods ended 03/31/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime <sup>1</sup>	Expense ratio (gross/net) <sup>2</sup>
<b>Growth</b>						
AMCAP Fund®	05/01/1967	2.41	14.10	10.10	11.52	0.49/0.49
American Funds® Global Insight Fund	04/01/2011	4.56	12.32	8.46	8.58	0.67/0.60
American Funds® International Vantage Fund	04/01/2011	3.15	9.59	6.11	5.86	0.72/0.69
EuroPacific Growth Fund®	04/16/1984	0.16	9.76	5.16	9.92	0.62/0.62
The Growth Fund of America®	12/01/1973	6.95	17.42	12.72	13.68	0.44/0.44
The New Economy Fund®	12/01/1983	5.10	13.81	10.36	11.30	0.56/0.56
New Perspective Fund®	03/13/1973	5.81	15.44	10.56	12.22	0.56/0.56
New World Fund®	06/17/1999	3.16	10.66	6.27	7.66	0.72/0.72
SMALLCAP World Fund®	04/30/1990	-7.31	9.54	6.64	9.09	0.80/0.80
<b>Growth and income</b>						
American Funds® Developing World Growth and Income Fund	02/03/2014	5.80	7.20	2.59	2.74	0.93/0.93
American Mutual Fund®	02/21/1950	10.12	14.72	9.79	11.61	0.42/0.42
Capital World Growth and Income Fund®	03/26/1993	5.36	13.80	8.10	10.26	0.56/0.56
Fundamental Investors®	08/01/1978	7.00	17.52	11.64	12.49	0.42/0.42
International Growth and Income Fund	10/01/2008	5.07	11.73	5.13	6.61	0.69/0.69
The Investment Company of America®	01/01/1934	9.92	18.59	11.58	12.28	0.41/0.41
Washington Mutual Investors Fund	07/31/1952	9.53	17.89	11.53	12.00	0.41/0.41
<b>Equity-income</b>						
Capital Income Builder®	07/30/1987	11.90	10.70	6.17	8.83	0.42/0.42
The Income Fund of America®	12/01/1973	11.37	11.59	7.25	10.61	0.41/0.41
<b>Balanced</b>						
American Balanced Fund®	07/26/1975	8.17	10.96	8.19	10.46	0.39/0.39
American Funds® Global Balanced Fund	02/01/2011	4.84	8.21	5.22	5.94	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**

Data for periods ended 03/31/2025 (%)	Inception date	1 year	5 years	10 years	Lifetime <sup>1</sup>	Expense ratio (gross/net) <sup>2</sup>
<b>Bond</b>						
American Funds Corporate Bond Fund®	12/14/2012	4.88	0.95	2.66	2.91	0.47/0.46
American Funds Emerging Markets Bond Fund®	04/22/2016	3.96	4.87	–	3.61	0.67/0.67
American Funds Inflation Linked Bond Fund®	12/14/2012	6.89	1.85	2.39	1.78	0.44/0.44
American Funds Mortgage Fund®	11/01/2010	5.38	-0.11	1.41	1.84	0.46/0.41
American Funds® Multi-Sector Income Fund	03/22/2019	6.72	5.26	–	4.54	0.52/0.51
American Funds® Strategic Bond Fund	03/18/2016	5.58	0.04	–	2.41	0.46/0.46
American High-Income Trust®	02/19/1988	8.40	8.65	5.07	7.53	0.47/0.47
The Bond Fund of America®	05/28/1974	5.03	0.30	1.84	6.90	0.40/0.39
Capital World Bond Fund®	08/04/1987	2.30	-1.09	0.44	5.03	0.64/0.64
Intermediate Bond Fund of America®	02/19/1988	6.03	1.19	1.76	4.26	0.43/0.40
Short-Term Bond Fund of America®	10/02/2006	5.69	1.52	1.61	1.73	0.44/0.44
U.S. Government Securities Fund®	10/17/1985	5.43	-0.62	1.35	4.97	0.44/0.40
<b>Money market</b>						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.89%/3.89% as of 03/31/2025]	05/01/2009	4.59	2.35	1.54	0.97	0.46/0.46
<b>Portfolio series</b>						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	8.53	9.00	6.03	6.91	0.43/0.43
American Funds® Global Growth Portfolio	05/18/2012	3.17	13.33	8.58	10.35	0.59/0.59
American Funds® Growth and Income Portfolio	05/18/2012	6.72	12.88	8.48	9.81	0.47/0.47
American Funds® Growth Portfolio	05/18/2012	3.94	14.83	9.82	11.72	0.52/0.52
American Funds® Moderate Growth and Income Portfolio	05/18/2012	6.68	10.42	7.24	8.56	0.49/0.49
American Funds® Preservation Portfolio	05/18/2012	5.84	1.33	1.71	1.61	0.43/0.43
<b>Retirement income portfolio series</b>						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	8.27	6.08	–	5.18	0.43/0.43
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	8.74	10.36	–	7.45	0.44/0.44
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	8.60	8.31	–	6.38	0.46/0.46
<b>Retirement target date</b>						
American Funds 2010 Target Date Retirement Fund®	02/01/2007	7.98	7.10	5.25	5.03	0.43/0.43
American Funds 2015 Target Date Retirement Fund®	02/01/2007	7.78	7.58	5.54	5.31	0.44/0.44
American Funds 2020 Target Date Retirement Fund®	02/01/2007	7.64	7.93	5.91	5.59	0.44/0.44
American Funds 2025 Target Date Retirement Fund®	02/01/2007	7.25	8.83	6.56	6.21	0.45/0.45
American Funds 2030 Target Date Retirement Fund®	02/01/2007	6.66	10.16	7.35	6.84	0.47/0.47
American Funds 2035 Target Date Retirement Fund®	02/01/2007	6.53	12.09	8.34	7.39	0.48/0.48
American Funds 2040 Target Date Retirement Fund®	02/01/2007	6.11	13.21	8.86	7.70	0.50/0.50
American Funds 2045 Target Date Retirement Fund®	02/01/2007	5.80	13.44	8.99	7.77	0.51/0.51
American Funds 2050 Target Date Retirement Fund®	02/01/2007	5.53	13.47	9.03	7.79	0.51/0.51
American Funds 2055 Target Date Retirement Fund®	02/01/2010	5.12	13.36	8.97	10.08	0.53/0.53
American Funds 2060 Target Date Retirement Fund®	03/27/2015	4.99	13.31	8.94	8.94	0.53/0.53
American Funds® 2065 Target Date Retirement Fund	03/27/2020	4.97	13.35	–	13.63	0.53/0.53
American Funds® 2070 Target Date Retirement Fund	05/03/2024	–	–	–	7.43	0.54/0.54

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
<b>Growth</b>											
AMCAP Fund®	Large Growth	05/01/1967	789	1079	78	821	949	87	–	–	–
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	186	322	60	209	286	76	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	133	389	37	137	335	47	–	–	–
EuroPacific Growth Fund®	Foreign Large Growth	04/16/1984	222	389	58	124	335	45	–	–	–
The Growth Fund of America®	Large Growth	12/01/1973	267	1079	30	387	949	47	–	–	–
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	96	342	28	113	280	39	–	–	–
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	71	342	23	46	280	17	–	–	–
New World Fund®	Diversified Emerging Mkts	06/17/1999	519	777	68	121	636	26	–	–	–
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	114	165	71	84	137	63	–	–	–
<b>Growth and income</b>											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	369	777	51	405	636	73	–	–	–
American Mutual Fund®	Large Value	02/21/1950	113	1158	15	802	1030	79	–	–	–
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	136	322	47	146	286	57	–	–	–
Fundamental Investors®	Large Blend	08/01/1978	552	1373	42	620	1169	55	–	–	–
International Growth and Income Fund	Foreign Large Blend	10/01/2008	457	692	68	298	615	48	–	–	–
The Investment Company of America®	Large Blend	01/01/1934	80	1373	8	235	1169	22	–	–	–
Washington Mutual Investors Fund	Large Blend	07/31/1952	109	1373	9	510	1169	46	–	–	–
<b>Equity-income</b>											
Capital Income Builder®	Global Allocation	07/30/1987	25	349	5	87	320	28	–	–	–
The Income Fund of America®	Moderately Aggressive Allocation	12/01/1973	11	301	2	168	262	60	–	–	–
<b>Balanced</b>											
American Balanced Fund®	Moderate Allocation	07/26/1975	73	707	10	154	628	27	–	–	–
American Funds® Global Balanced Fund	Global Allocation	02/01/2011	185	349	55	210	320	66	–	–	–
<b>Bond</b>											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	121	177	75	133	156	92	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	211	226	99	64	205	37	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	12	147	9	88	130	77	–	–	–
American Funds Mortgage Fund®	Intermediate Government	11/01/2010	48	228	23	23	206	13	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	159	369	45	–	–	–	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	169	573	31	387	478	84	–	–	–
American High-Income Trust®	High Yield Bond	02/19/1988	27	618	6	43	537	10	–	–	–
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	171	462	41	124	380	31	–	–	–
Capital World Bond Fund®	Global Bond	08/04/1987	109	159	71	112	151	78	–	–	–
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	219	558	45	434	485	92	–	–	–
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	359	558	66	389	485	86	–	–	–
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	33	228	16	62	206	32	–	–	–

**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.

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.

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-5E 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-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: 11/1/2025)
- 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-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. 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 available at the time of publication. The expense ratio for American Funds® 2070 Target Date Retirement Fund is estimated.

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.

© 2025 Morningstar, Inc. All Rights Reserved. Some of 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. 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.