Retirement plan investments quarterly statistical update

Share Class R-4

Data as of March 31, 2026, 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 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-4 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	15.22	7.50	11.58	11.34	0.67/0.67
American Funds® Global Insight Fund	04/01/2011	17.18	7.38	10.58	8.95	0.80/0.80
American Funds® International Vantage Fund	04/01/2011	16.47	5.67	8.40	6.34	0.89/0.88
EUPAC Fund™	04/16/1984	21.88	3.72	8.02	9.94	0.82/0.82
The Growth Fund of America®	12/01/1973	17.77	9.37	14.44	13.55	0.63/0.63
The New Economy Fund®	12/01/1983	31.54	9.08	13.53	11.53	0.75/0.75
New Perspective Fund®	03/13/1973	17.08	7.34	12.32	12.08	0.75/0.75
New World Fund®	06/17/1999	24.16	4.77	9.35	8.02	0.92/0.92
SMALLCAP World Fund®	04/30/1990	20.77	0.57	9.07	9.18	1.00/1.00
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	29.40	3.15	6.42	4.52	1.12/1.12
American Mutual Fund®	02/21/1950	11.83	9.74	10.73	11.35	0.62/0.62
Capital World Growth and Income Fund®	03/26/1993	23.21	9.00	10.67	10.39	0.76/0.76
Fundamental Investors®	08/01/1978	24.03	12.26	13.60	12.51	0.63/0.63
International Growth and Income Fund	10/01/2008	27.75	7.69	8.68	7.53	0.88/0.88
The Investment Company of America®	01/01/1934	18.11	12.64	13.12	12.09	0.61/0.61
Washington Mutual Investors Fund	07/31/1952	13.06	11.34	12.53	11.81	0.60/0.60
Equity-income						
Capital Income Builder®	07/30/1987	16.37	8.36	7.56	8.79	0.61/0.61
The Income Fund of America®	12/01/1973	15.61	8.35	8.56	10.48	0.61/0.61
Balanced						
American Balanced Fund®	07/26/1975	17.36	8.48	9.44	10.40	0.60/0.60
American Funds® Global Balanced Fund	02/01/2011	14.87	5.44	6.58	6.32	0.81/0.81

Class R-4 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	3.86	0.14	2.57	2.76	0.66/0.66
American Funds Emerging Markets Bond Fund®	04/22/2016	10.43	3.00	–	4.00	0.89/0.89
American Funds Inflation Linked Bond Fund®	12/14/2012	2.27	0.53	2.32	1.58	0.64/0.64
American Funds Mortgage Fund®	11/01/2010	4.91	0.46	1.40	1.85	0.62/0.62
American Funds® Core Plus Bond Fund	09/25/2025	–	–	–	0.86	0.95/0.68
American Funds® Multi-Sector Income Fund	03/22/2019	5.70	2.94	–	4.56	0.67/0.67
American Funds® Strategic Bond Fund	03/18/2016	3.42	-0.49	2.23	2.33	0.65/0.65
American High-Income Trust®	02/19/1988	7.13	5.00	6.38	7.28	0.70/0.70
The Bond Fund of America®	05/28/1974	4.02	0.19	1.89	6.60	0.57/0.57
Capital World Bond Fund®	08/04/1987	3.63	-2.06	0.45	4.81	0.83/0.83
Intermediate Bond Fund of America®	02/19/1988	4.13	1.27	1.82	4.06	0.59/0.59
Short-Term Bond Fund of America®	10/02/2006	3.57	1.77	1.71	1.65	0.62/0.62
U.S. Government Securities Fund®	10/17/1985	3.88	0.18	1.26	4.73	0.60/0.60
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.05%/3.05% as of 03/31/2026]	05/01/2009	3.49	2.93	1.77	1.04	0.65/0.65
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	11.31	6.28	6.99	7.04	0.64/0.64
American Funds® Global Growth Portfolio	05/18/2012	21.72	6.74	10.99	10.94	0.79/0.79
American Funds® Growth and Income Portfolio	05/18/2012	16.21	8.12	9.96	10.08	0.67/0.67
American Funds® Growth Portfolio	05/18/2012	19.79	8.04	11.91	12.10	0.71/0.71
American Funds® Moderate Growth and Income Portfolio	05/18/2012	14.95	6.91	8.54	8.82	0.68/0.68
American Funds® Preservation Portfolio	05/18/2012	3.82	1.50	1.79	1.61	0.62/0.62
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	9.99	4.47	5.35	5.42	0.63/0.63
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	15.01	7.65	8.04	8.04	0.57/0.57
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	12.87	6.21	6.78	6.80	0.61/0.61
Retirement target date						
American Funds 2030 Target Date Retirement Fund®	02/01/2007	12.72	6.01	8.51	6.94	0.68/0.68
American Funds 2035 Target Date Retirement Fund®	02/01/2007	14.22	6.82	9.71	7.54	0.69/0.69
American Funds 2040 Target Date Retirement Fund®	02/01/2007	16.99	7.76	10.51	7.97	0.71/0.71
American Funds 2045 Target Date Retirement Fund®	02/01/2007	17.85	7.94	10.74	8.08	0.72/0.72
American Funds 2050 Target Date Retirement Fund®	02/01/2007	17.92	7.87	10.79	8.10	0.72/0.72
American Funds 2055 Target Date Retirement Fund®	02/01/2010	18.47	7.86	10.77	10.38	0.73/0.73
American Funds 2060 Target Date Retirement Fund®	03/27/2015	18.54	7.82	10.75	9.58	0.74/0.74
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	9.83	4.93	5.98	5.09	0.63/0.63
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	10.25	5.06	6.31	5.37	0.65/0.65
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	10.87	5.29	6.76	5.68	0.65/0.65
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	11.15	5.37	7.48	6.27	0.66/0.66
American Funds® 2065 Target Date Retirement Fund	03/27/2020	18.57	7.83	–	14.25	0.74/0.74
American Funds® 2070 Target Date Retirement Fund	05/03/2024	18.60	–	–	13.44	0.73/0.73

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	626	1077	59	670	937	75	696	763	90
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	194	323	60	186	292	64	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	133	382	37	57	332	23	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	56	382	19	138	332	45	86	225	42
The Growth Fund of America®	Large Growth	12/01/1973	397	1077	42	429	937	51	376	763	50
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	19	314	5	38	274	12	19	193	13
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	78	314	23	97	274	30	58	193	26
New World Fund®	Diversified Emerging Mkts	06/17/1999	611	735	82	213	617	43	77	461	16
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	70	168	48	88	147	59	25	93	28
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	507	735	68	379	617	69	370	461	80
American Mutual Fund®	Large Value	02/21/1950	830	1090	77	466	983	49	402	823	53
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	49	323	18	121	292	44	75	207	43
Fundamental Investors®	Large Blend	08/01/1978	80	1312	6	160	1122	15	286	886	36
International Growth and Income Fund	Foreign Large Blend	10/01/2008	119	685	20	258	617	47	179	486	42
The Investment Company of America®	Large Blend	01/01/1934	345	1312	29	106	1122	10	421	886	49
Washington Mutual Investors Fund	Large Value	07/31/1952	703	1090	67	139	983	17	73	823	11
Equity-income											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	82	177	53	24	168	11	107	142	85
The Income Fund of America®	Global Moderate Allocation	12/01/1973	144	414	38	45	394	12	23	325	8
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	40	488	10	21	445	5	47	371	16
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	178	414	45	189	394	52	202	325	65
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	140	166	94	119	148	92	–	–	–
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	100	207	44	74	190	42	–	–	–
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	105	147	79	102	131	83	56	108	67
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	79	128	67	44	123	38	29	105	28
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	–	–	–	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	183	356	50	105	305	42	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	500	539	94	422	455	96	166	355	51
American High-Income Trust®	High Yield Bond	02/19/1988	180	612	29	42	538	8	34	437	9
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	315	444	76	206	377	61	90	279	34
Capital World Bond Fund®	Global Bond	08/04/1987	105	146	76	101	141	79	83	123	67
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	326	544	68	453	496	95	307	379	89
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	470	544	91	367	496	81	324	379	91
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	46	102	51	28	90	40	19	73	31

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	56	215	21	28	199	9	27	164	17
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	23	134	14	81	124	65	15	101	16
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	64	123	43	39	117	25	33	100	28
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	18	88	11	14	87	5	6	68	2
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	108	488	19	146	445	29	138	371	36
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	422	544	85	434	496	92	314	379	90
Retirement income portfolio series											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	119	215	52	99	199	41	115	164	73
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	100	488	18	75	445	16	194	371	51
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	230	488	42	242	445	51	322	371	87
Retirement target date											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	93	194	50	19	176	15	17	115	17
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	107	189	62	29	168	19	8	116	6
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	67	187	36	38	169	22	8	115	3
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	96	184	52	73	168	49	15	116	11
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	119	187	70	89	169	62	17	115	13
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	110	184	65	94	168	64	22	115	18
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	113	184	68	99	168	67	25	82	35
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	14	86	14	7	69	3	12	50	14
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	33	91	31	7	77	3	18	56	24
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	55	106	40	7	91	2	22	61	29
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	87	137	62	13	120	9	27	83	36
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065+	03/27/2020	174	256	74	84	132	70	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2065+	05/03/2024	171	256	73	–	–	–	–	–	–

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-4 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-4 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-4

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.

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