CAPITAL GROUP®

American Funds®

Retirement plan investments quarterly statistical update

Share Class R-1

Data as of September 30, 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-1 shares		Average annual total returns				
Data for periods ended 09/30/2026 (%)	Inception date	1 year	5 years	10 years	Lifetime[1]	Expense ratio (gross/net)[2]
Growth						
AMCAP Fund®	05/01/1967	7.64	7.76	11.61	10.65	1.42/1.42
American Funds® Global Insight Fund	04/01/2011	12.22	8.77	10.73	8.88	1.51/1.51
American Funds® International Vantage Fund	04/01/2011	9.58	5.74	8.18	6.06	1.61/1.60
EUPAC Fund™	04/16/1984	14.70	4.77	7.81	9.33	1.57/1.57
The Growth Fund of America®	12/01/1973	10.74	10.49	14.58	12.93	1.37/1.37
The New Economy Fund®	12/01/1983	26.91	11.66	14.53	11.11	1.49/1.49
New Perspective Fund®	03/13/1973	8.47	7.46	12.12	11.35	1.49/1.49
New World Fund®	06/17/1999	18.60	6.41	9.28	7.62	1.66/1.66
SMALLCAP World Fund®	04/30/1990	12.74	0.69	8.31	8.55	1.74/1.74
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	22.25	5.77	6.62	4.92	1.88/1.88
American Mutual Fund®	02/21/1950	7.63	9.63	10.04	10.52	1.36/1.36
Capital World Growth and Income Fund®	03/26/1993	18.88	10.79	10.83	9.88	1.51/1.51
Fundamental Investors®	08/01/1978	16.98	13.63	13.68	11.87	1.37/1.37
International Growth and Income Fund	10/01/2008	17.94	8.79	8.35	7.20	1.62/1.62
The Investment Company of America®	01/01/1934	11.46	13.50	13.07	11.34	1.33/1.33
Washington Mutual Investors Fund	07/31/1952	7.59	11.29	12.13	11.01	1.35/1.35
Equity-income						
Capital Income Builder®	07/30/1987	9.41	8.06	6.86	7.99	1.35/1.35
The Income Fund of America®	12/01/1973	7.14	7.29	7.42	9.59	1.35/1.35
Balanced						
American Balanced Fund®	07/26/1975	10.15	8.37	8.97	9.62	1.32/1.32
American Funds® Global Balanced Fund	02/01/2011	7.42	5.04	5.83	5.74	1.53/1.53

Class R-1 shares		Average annual total returns				
Data for periods ended 09/30/2026 (%)	Inception date	1 year	5 years	10 years	Lifetime[1]	Expense ratio (gross/net)[2]
Bond						
American Funds® Core Plus Bond Fund	09/25/2025	-2.14	–	–	-1.91	1.70/1.43
American Funds Corporate Bond Fund®	12/14/2012	-3.91	-1.87	1.04	1.71	1.41/1.41
American Funds Emerging Markets Bond Fund®	04/22/2016	2.16	2.20	3.01	3.40	1.62/1.62
American Funds Inflation Linked Bond Fund®	12/14/2012	-3.49	-1.61	0.99	0.57	1.40/1.40
American Funds Mortgage Fund®	11/01/2010	-3.85	-1.32	0.06	0.86	1.38/1.38
American Funds® Multi-Sector Income Fund	03/22/2019	-1.19	1.48	–	3.50	1.45/1.45
American Funds® Strategic Bond Fund	03/18/2016	-4.83	-2.83	0.82	1.14	1.40/1.40
American High-Income Trust®	02/19/1988	0.33	3.20	4.48	6.35	1.45/1.45
The Bond Fund of America®	05/28/1974	-3.08	-1.54	0.55	5.66	1.32/1.32
Capital World Bond Fund®	08/04/1987	-4.71	-3.35	-0.91	3.87	1.58/1.58
Intermediate Bond Fund of America®	02/19/1988	-1.69	0.00	0.78	3.16	1.31/1.31
Short-Term Bond Fund of America®	10/02/2006	0.19	0.97	0.86	0.83	1.38/1.38
U.S. Government Securities Fund®	10/17/1985	-3.94	-1.71	0.04	3.77	1.33/1.33
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.50%/3.50% as of 09/30/2026]	05/01/2009	3.47	3.51	2.13	1.22	0.36/0.36
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	4.71	5.48	5.99	6.24	1.37/1.37
American Funds® Global Growth Portfolio	05/18/2012	14.90	7.85	11.13	10.89	1.52/1.52
American Funds® Growth and Income Portfolio	05/18/2012	9.54	8.29	9.52	9.61	1.42/1.42
American Funds® Growth Portfolio	05/18/2012	12.41	8.84	11.91	11.99	1.47/1.47
American Funds® Moderate Growth and Income Portfolio	05/18/2012	8.09	6.66	7.94	8.21	1.41/1.41
American Funds® Preservation Portfolio	05/18/2012	-0.72	0.44	0.81	0.72	1.36/1.36
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	2.95	3.42	4.38	4.60	1.32/1.32
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	8.02	7.11	7.36	7.51	1.34/1.34
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	5.72	5.41	5.93	6.07	1.32/1.32
Retirement target date						
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	3.01	3.94	4.92	4.26	1.37/1.37
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	3.47	4.10	5.29	4.56	1.39/1.39
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	3.88	4.45	5.80	4.89	1.39/1.39
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	4.20	4.54	6.51	5.49	1.40/1.40
American Funds 2030 Target Date Retirement Fund®	02/01/2007	5.31	5.40	7.62	6.23	1.42/1.42
American Funds 2035 Target Date Retirement Fund®	02/01/2007	6.96	6.43	8.96	6.90	1.43/1.43
American Funds 2040 Target Date Retirement Fund®	02/01/2007	9.63	7.85	10.03	7.46	1.45/1.45
American Funds 2045 Target Date Retirement Fund®	02/01/2007	11.08	8.33	10.41	7.66	1.46/1.46
American Funds 2050 Target Date Retirement Fund®	02/01/2007	11.45	8.36	10.51	7.71	1.46/1.46
American Funds 2055 Target Date Retirement Fund®	02/01/2010	11.87	8.44	10.56	10.03	1.47/1.47
American Funds 2060 Target Date Retirement Fund®	03/27/2015	12.04	8.47	10.58	9.56	1.48/1.48
American Funds® 2065 Target Date Retirement Fund	03/27/2020	12.04	8.48	–	14.60	1.49/1.49
American Funds® 2070 Target Date Retirement Fund	05/03/2024	12.46	–	–	16.25	1.48/1.48

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 09/30/2026	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	614	1049	65	759	914	84	715	744	96
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	191	326	63	191	290	66	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	160	374	42	104	333	31	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	65	374	19	158	333	46	127	222	59
The Growth Fund of America®	Large Growth	12/01/1973	394	1049	48	460	914	56	555	744	73
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	24	293	5	30	274	7	21	201	9
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	149	293	46	119	274	36	92	201	41
New World Fund®	Diversified Emerging Mkts	06/17/1999	604	724	81	422	629	72	156	467	33
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	57	167	38	98	148	64	35	90	35
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	538	724	72	464	629	78	406	467	86
American Mutual Fund®	Large Value	02/21/1950	1001	1117	89	753	994	75	651	842	78
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	51	326	14	109	290	38	111	219	57
Fundamental Investors®	Large Blend	08/01/1978	212	1325	18	233	1122	22	536	898	61
International Growth and Income Fund	Foreign Large Blend	10/01/2008	221	672	33	300	604	54	318	486	70
The Investment Company of America®	Large Blend	01/01/1934	912	1325	70	283	1122	26	637	898	70
Washington Mutual Investors Fund	Large Value	07/31/1952	1010	1117	89	388	994	44	201	842	27
Equity-income											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	140	174	83	66	168	44	125	140	92
The Income Fund of America®	Global Moderate Allocation	12/01/1973	346	409	86	89	388	25	124	323	42
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	98	482	23	52	441	12	117	377	31
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	328	409	82	321	388	86	283	323	88
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	167	171	98	148	151	100	104	110	98
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	134	204	64	104	191	55	76	148	60
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	131	143	86	118	128	87	95	106	88
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	120	125	98	106	121	91	88	103	89
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	306	549	64	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	304	363	82	220	310	74	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	545	549	100	449	453	100	313	351	92
American High-Income Trust®	High Yield Bond	02/19/1988	540	616	88	298	540	60	191	444	49
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	425	452	96	350	383	96	256	292	91
Capital World Bond Fund®	Global Bond	08/04/1987	126	135	92	126	134	93	104	114	89
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	540	543	100	489	493	100	386	389	100
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	476	543	90	464	493	96	380	389	100
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	102	106	95	80	91	95	65	79	91

American Funds Morningstar rankings

Data for periods ended 09/30/2026	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	142	216	67	51	204	19	58	167	30
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	57	132	40	90	124	67	31	101	27
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	104	116	83	70	111	48	60	97	47
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	45	87	37	37	86	30	13	69	4
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	261	482	51	238	441	51	219	377	54
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	525	543	98	482	493	99	384	389	100
Retirement income portfolio series											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	199	216	90	170	204	83	152	167	93
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	267	482	52	189	441	39	283	377	76
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	376	482	75	365	441	78	360	377	94
Retirement target date											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	157	189	87	113	175	69	82	123	74
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	161	184	91	129	172	79	62	121	53
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	154	187	87	112	173	68	55	123	45
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	152	184	88	126	172	78	72	121	62
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	164	187	93	146	173	88	84	123	73
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	161	184	92	149	172	90	89	120	81
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	157	184	91	150	172	91	72	97	80
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	81	81	100	31	70	43	46	48	97
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	78	80	95	37	70	53	47	49	92
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	100	101	96	51	90	59	57	62	91
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	119	123	96	89	110	84	66	75	91
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065	03/27/2020	149	175	91	129	144	93	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2070+	05/03/2024	119	134	93	–	–	–	–	–	–

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.

The return of principal for bond portfolios and 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.

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.

The value of fixed income securities may be affected by changing interest rates and changes in credit ratings of the securities.

Lower rated bonds are subject to greater fluctuations in value and risk of loss of income and principal than higher rated bonds.

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.

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.

Investments in mortgage-related securities involve additional risks, such as prepayment risk.

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.

Interests in Capital Group's U.S. Government Securities portfolios are not guaranteed by the U.S. government.

Smaller company stocks entail additional risks, and they can fluctuate in price more than larger company stocks.

Frequent and active trading of portfolio securities may occur, which may involve correspondingly greater transaction costs, adversely affecting the results.

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.

Although American Funds Global Balanced Fund, International Growth and Income Fund, and American Funds Mortgage Fund have plans of distribution for Class R-1 shares, fees for distribution are not paid on amounts invested in the fund by the investment adviser and/or its affiliates. If fees for these services were charged on these assets, fund results would have been lower and expenses would have been higher. 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-1 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-1 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-1

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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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