CAPITAL GROUP®

American Funds®

Retirement plan investments quarterly statistical update

Share Class R-5E

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-5E 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	8.67	8.78	12.68	11.75	0.48/0.48
American Funds® Global Insight Fund	04/01/2011	13.15	9.57	11.52	9.75	0.71/0.60
American Funds® International Vantage Fund	04/01/2011	10.55	6.65	9.04	6.98	0.75/0.69
EUPAC Fund™	04/16/1984	15.80	5.77	8.85	10.40	0.62/0.62
The Growth Fund of America®	12/01/1973	11.78	11.53	15.66	14.01	0.44/0.44
The New Economy Fund®	12/01/1983	28.09	12.70	15.62	12.18	0.55/0.55
New Perspective Fund®	03/13/1973	9.49	8.47	13.18	12.44	0.55/0.55
New World Fund®	06/17/1999	19.72	7.41	10.34	8.70	0.72/0.72
SMALLCAP World Fund®	04/30/1990	13.81	1.64	9.35	9.61	0.80/0.80
Growth and income						
American Funds® Developing World Growth and Income Fund	02/03/2014	23.38	6.77	7.65	5.92	0.94/0.92
American Mutual Fund®	02/21/1950	8.64	10.67	11.10	11.64	0.42/0.42
Capital World Growth and Income Fund®	03/26/1993	19.99	11.83	11.88	10.96	0.56/0.56
Fundamental Investors®	08/01/1978	18.07	14.70	14.77	12.95	0.43/0.43
International Growth and Income Fund	10/01/2008	19.04	9.83	9.38	8.11	0.68/0.68
The Investment Company of America®	01/01/1934	12.48	14.55	14.13	12.44	0.41/0.41
Washington Mutual Investors Fund	07/31/1952	8.60	12.33	13.19	12.07	0.41/0.41
Equity-income						
Capital Income Builder®	07/30/1987	10.44	9.08	7.88	9.05	0.41/0.41
The Income Fund of America®	12/01/1973	8.10	8.30	8.43	10.65	0.41/0.41
Balanced						
American Balanced Fund®	07/26/1975	11.18	9.38	10.00	10.65	0.39/0.39
American Funds® Global Balanced Fund	02/01/2011	8.39	5.99	6.82	6.67	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 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	-2.31	–	–	-2.09	0.76/0.49
American Funds Corporate Bond Fund®	12/14/2012	-3.01	-0.95	1.93	2.64	0.48/0.48
American Funds Emerging Markets Bond Fund®	04/22/2016	3.03	3.10	3.90	4.28	0.73/0.69
American Funds Inflation Linked Bond Fund®	12/14/2012	-2.61	-0.67	1.97	1.58	0.44/0.44
American Funds Mortgage Fund®	11/01/2010	-2.83	-0.35	1.07	1.71	0.46/0.42
American Funds® Multi-Sector Income Fund	03/22/2019	-0.29	2.22	–	4.27	0.56/0.50
American Funds® Strategic Bond Fund	03/18/2016	-3.94	-1.92	1.74	2.01	0.47/0.47
American High-Income Trust®	02/19/1988	1.27	4.17	5.50	7.41	0.51/0.51
The Bond Fund of America®	05/28/1974	-2.16	-0.61	1.51	6.71	0.38/0.38
Capital World Bond Fund®	08/04/1987	-3.73	-2.43	0.04	4.88	0.64/0.64
Intermediate Bond Fund of America®	02/19/1988	-0.69	0.93	1.75	4.15	0.40/0.40
Short-Term Bond Fund of America®	10/02/2006	0.96	1.92	1.81	1.77	0.44/0.44
U.S. Government Securities Fund®	10/17/1985	-3.00	-0.79	1.00	4.78	0.40/0.40
Money market						
American Funds® U.S. Government Money Market Fund [7-day SEC yield (gross/net): 3.42%/3.42% as of 09/30/2026]	05/01/2009	3.39	3.43	2.08	1.19	0.45/0.45
Portfolio series						
American Funds® Conservative Growth and Income Portfolio	05/18/2012	5.64	6.44	6.98	7.23	0.46/0.46
American Funds® Global Growth Portfolio	05/18/2012	15.97	8.81	12.15	11.89	0.59/0.59
American Funds® Growth and Income Portfolio	05/18/2012	10.56	9.31	10.57	10.64	0.48/0.48
American Funds® Growth Portfolio	05/18/2012	13.52	9.88	12.99	13.04	0.51/0.51
American Funds® Moderate Growth and Income Portfolio	05/18/2012	9.09	7.65	8.95	9.21	0.49/0.49
American Funds® Preservation Portfolio	05/18/2012	0.21	1.36	1.77	1.65	0.43/0.43
Retirement income portfolio series						
American Funds® Retirement Income Portfolio – Conservative	08/28/2015	3.85	4.36	5.35	5.52	0.39/0.39
American Funds® Retirement Income Portfolio – Enhanced	08/28/2015	8.84	8.03	8.25	8.32	0.45/0.45
American Funds® Retirement Income Portfolio – Moderate	08/28/2015	6.66	6.35	6.90	7.01	0.50/0.47
Retirement target date						
American Funds® 2010 Target Date Retirement Income Fund	02/01/2007	4.00	4.93	5.93	5.25	0.42/0.42
American Funds® 2015 Target Date Retirement Income Fund	02/01/2007	4.42	5.08	6.30	5.55	0.44/0.44
American Funds® 2020 Target Date Retirement Income Fund	02/01/2007	4.87	5.43	6.81	5.88	0.44/0.44
American Funds® 2025 Target Date Retirement Income Fund	02/01/2007	5.19	5.53	7.53	6.50	0.45/0.45
American Funds 2030 Target Date Retirement Fund®	02/01/2007	6.33	6.40	8.66	7.24	0.47/0.47
American Funds 2035 Target Date Retirement Fund®	02/01/2007	7.96	7.44	10.01	7.93	0.48/0.48
American Funds 2040 Target Date Retirement Fund®	02/01/2007	10.64	8.89	11.09	8.50	0.50/0.50
American Funds 2045 Target Date Retirement Fund®	02/01/2007	12.15	9.37	11.48	8.68	0.51/0.51
American Funds 2050 Target Date Retirement Fund®	02/01/2007	12.45	9.39	11.58	8.74	0.51/0.51
American Funds 2055 Target Date Retirement Fund®	02/01/2010	12.94	9.47	11.63	11.08	0.52/0.52
American Funds 2060 Target Date Retirement Fund®	03/27/2015	13.14	9.50	11.63	10.55	0.53/0.53
American Funds® 2065 Target Date Retirement Fund	03/27/2020	13.14	9.50	–	15.51	0.53/0.53
American Funds® 2070 Target Date Retirement Fund	05/03/2024	13.20	–	–	16.66	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

			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	531	1049	58	681	914	77	682	744	91
American Funds® Global Insight Fund	Global Large-Stock Blend	04/01/2011	172	326	58	165	290	60	–	–	–
American Funds® International Vantage Fund	Foreign Large Growth	04/01/2011	139	374	39	59	333	21	–	–	–
EUPAC Fund™	Foreign Large Growth	04/16/1984	49	374	15	102	333	31	65	222	33
The Growth Fund of America®	Large Growth	12/01/1973	318	1049	40	319	914	45	392	744	55
The New Economy Fund®	Global Large-Stock Growth	12/01/1983	11	293	3	8	274	1	9	201	4
New Perspective Fund®	Global Large-Stock Growth	03/13/1973	130	293	42	97	274	31	57	201	24
New World Fund®	Diversified Emerging Mkts	06/17/1999	581	724	78	335	629	62	56	467	12
SMALLCAP World Fund®	Global Small/Mid Stock	04/30/1990	42	167	29	74	148	54	20	90	23
Growth and income											
American Funds® Developing World Growth and Income Fund	Diversified Emerging Mkts	02/03/2014	505	724	69	389	629	70	319	467	70
American Mutual Fund®	Large Value	02/21/1950	938	1117	85	517	994	54	418	842	54
Capital World Growth and Income Fund®	Global Large-Stock Blend	03/26/1993	33	326	11	52	290	20	63	219	32
Fundamental Investors®	Large Blend	08/01/1978	142	1325	12	90	1122	9	264	898	32
International Growth and Income Fund	Foreign Large Blend	10/01/2008	159	672	24	159	604	28	142	486	32
The Investment Company of America®	Large Blend	01/01/1934	814	1325	64	111	1122	11	443	898	51
Washington Mutual Investors Fund	Large Value	07/31/1952	941	1117	86	216	994	25	57	842	9
Equity-income											
Capital Income Builder®	Global Moderately Aggressive Allocation	07/30/1987	113	174	68	23	168	18	106	140	84
The Income Fund of America®	Global Moderate Allocation	12/01/1973	285	409	75	50	388	16	29	323	11
Balanced											
American Balanced Fund®	Moderate Allocation	07/26/1975	60	482	16	17	441	5	42	377	13
American Funds® Global Balanced Fund	Global Moderate Allocation	02/01/2011	260	409	71	196	388	53	191	323	63
Bond											
American Funds Corporate Bond Fund®	Corporate Bond	12/14/2012	138	171	87	116	151	88	65	110	62
American Funds Emerging Markets Bond Fund®	Emerging Markets Bond	04/22/2016	90	204	51	50	191	30	23	148	18
American Funds Inflation Linked Bond Fund®	Inflation-Protected Bond	12/14/2012	92	143	73	89	128	77	39	106	52
American Funds Mortgage Fund®	Government Mortgage-Backed Bond	11/01/2010	101	125	92	45	121	45	18	103	20
American Funds® Core Plus Bond Fund	Intermediate Core-Plus Bond	09/25/2025	379	549	77	–	–	–	–	–	–
American Funds® Multi-Sector Income Fund	Multisector Bond	03/22/2019	243	363	70	119	310	46	–	–	–
American Funds® Strategic Bond Fund	Intermediate Core-Plus Bond	03/18/2016	534	549	100	432	453	98	117	351	37
American High-Income Trust®	High Yield Bond	02/19/1988	363	616	65	87	540	20	31	444	9
The Bond Fund of America®	Intermediate Core Bond	05/28/1974	240	452	62	124	383	33	43	292	18
Capital World Bond Fund®	Global Bond	08/04/1987	101	135	81	103	134	82	75	114	67
Intermediate Bond Fund of America®	Short-Term Bond	02/19/1988	522	543	98	465	493	96	307	389	85
Short-Term Bond Fund of America®	Short-Term Bond	10/02/2006	376	543	72	307	493	70	284	389	80
U.S. Government Securities Fund®	Intermediate Government	10/17/1985	87	106	90	28	91	40	7	79	8

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	96	216	45	19	204	6	17	167	11
American Funds® Global Growth Portfolio	Global Aggressive Allocation	05/18/2012	26	132	20	64	124	55	7	101	4
American Funds® Growth and Income Portfolio	Moderately Aggressive Allocation	05/18/2012	84	116	70	45	111	33	32	97	27
American Funds® Growth Portfolio	Aggressive Allocation	05/18/2012	25	87	25	12	86	5	4	69	1
American Funds® Moderate Growth and Income Portfolio	Moderate Allocation	05/18/2012	162	482	34	123	441	25	120	377	31
American Funds® Preservation Portfolio	Short-Term Bond	05/18/2012	474	543	89	429	493	92	300	389	83
Retirement income portfolio series											
American Funds® Retirement Income Portfolio – Conservative	Moderately Conservative Allocation	08/28/2015	168	216	80	107	204	49	107	167	66
American Funds® Retirement Income Portfolio – Enhanced	Moderate Allocation	08/28/2015	193	482	39	89	441	20	188	377	47
American Funds® Retirement Income Portfolio – Moderate	Moderate Allocation	08/28/2015	324	482	67	277	441	59	315	377	83
Retirement target date											
American Funds 2030 Target Date Retirement Fund®	Target-Date 2030	02/01/2007	139	189	82	28	175	26	11	123	12
American Funds 2035 Target Date Retirement Fund®	Target-Date 2035	02/01/2007	140	184	84	39	172	27	5	121	4
American Funds 2040 Target Date Retirement Fund®	Target-Date 2040	02/01/2007	125	187	77	39	173	25	5	123	2
American Funds 2045 Target Date Retirement Fund®	Target-Date 2045	02/01/2007	126	184	77	67	172	44	7	121	3
American Funds 2050 Target Date Retirement Fund®	Target-Date 2050	02/01/2007	140	187	85	89	173	59	14	123	11
American Funds 2055 Target Date Retirement Fund®	Target-Date 2055	02/01/2010	140	184	85	91	172	61	15	120	12
American Funds 2060 Target Date Retirement Fund®	Target-Date 2060	03/27/2015	137	184	85	92	172	61	15	97	18
American Funds® 2010 Target Date Retirement Income Fund	Target-Date 2000-2010	02/01/2007	68	81	89	8	70	8	8	48	9
American Funds® 2015 Target Date Retirement Income Fund	Target-Date 2015	02/01/2007	69	80	85	7	70	6	10	49	12
American Funds® 2020 Target Date Retirement Income Fund	Target-Date 2020	02/01/2007	86	101	86	8	90	5	13	62	18
American Funds® 2025 Target Date Retirement Income Fund	Target-Date 2025	02/01/2007	103	123	88	19	110	24	20	75	30
American Funds® 2065 Target Date Retirement Fund	Target-Date 2065	03/27/2020	131	175	84	83	144	66	–	–	–
American Funds® 2070 Target Date Retirement Fund	Target-Date 2070+	05/03/2024	110	134	89	–	–	–	–	–	–

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.

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.

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

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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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