



課 綱 Course Outline  
財務金融學系學士班國際組

中文課程名稱 Course Name in Chinese	投資學				
英文課程名稱 Course Name in English	Investments				
科目代碼 Course Code	FIN_B0120	班 別 Degree	學士班 Bachelor' s		
修別 Type	學程 Program	學分數 Credit(s)	3.0	時 數 Hour(s)	3.0
先修課程 Prerequisite					
課程目標 Course Objectives					
This course lays out the general framework for the investment process and the practical applications of investment theory. It can give students the skill to conduct an assessment of current issues and debates.					
系教育目標 Dept.' s Education Objectives					
1	培育財務金融業之管理人 Cultivate talents with a skill of financial management.				
2	培育具備投資理財能力之人才 Cultivate talents with a skill of investment and manage finances.				
3	培育政府及企業所需之財務人才 Trains the talents needed for our nation' s economic and business environment.				
系專業能力 Basic Learning Outcomes				課程目標與系專業能力相關性 Correlation between Course Objectives and Dept.' s Education Objectives	
A	具備經濟學、會計學、統計學及數學的基礎能力 Basic knowledge of the financial theory Economics, accounting, statistical and mathematical ability.				
B	具備財務金融基本學理 Understanding of the development of the financial disciplinal.				●
C	具備運用財務金融學理進行分析能力 Basic knowledge of financial theory analysis.				●
D	具備資料整理、書面呈現或口頭報告之能力 Basic knowledge of documentation and presentation skills.				○

E	具備財經時事基本分析能力 Capabilities for financial analysis of current affairs	○
F	具備電腦程式運算及應用基本能力 Ability of computer programs, algorithms and applications	○
G	具備英語閱讀溝通協調等基本能力 English reading ability of communication and coordination	●

圖示說明Illustration：● 高度相關 Highly correlated ○ 中度相關 Moderately correlated

課程大綱  
Course Outline

This course can be partitioned into four parts.  
Part One is an introduction to financial markets, instruments, and trading of securities. This part also describes the mutual fund industry.  
Part Two is a fairly detailed presentation of “modern portfolio theory.” This part treats the effect of diversification on portfolio risk, the efficient diversification of investor portfolios, the choice of portfolios that strike an attractive balance between risk and return, and the efficient market hypothesis.  
Part Three covers securities analysis and valuation. It is devoted to debt markets, equity markets, and derivative assets, such as options and futures contracts.  
Part Four is an introduction to active investment management. This part discusses the role of active management in nearly efficient markets, considers how one should evaluate the performance of managers who pursue active strategies.

資源需求評估（師資專長之聘任、儀器設備的配合．．．等）  
Resources Required (e.g. qualifications and expertise, instrument and equipment, etc.)

Teachers with backgrounds in finance-related fields  
Notebook, Projectors, Security market database

課程要求和教學方式之建議  
Course Requirements and Suggested Teaching Methods

Lectures: textbook materials  
Quizzes: Quizzes enable students to determine whether the preceding material has been understood.  
Homework: This course requires students to perform portfolio construction and securities analysis in spreadsheet format.

其他  
Miscellaneous