



## 教學計劃表 Syllabus

課程名稱(中文) Course Name in Chinese	投資學	學年/學期 Academic Year/Semester	108/1
課程名稱(英文) Course Name in English	Investments		
科目代碼 Course Code	EC_34330	系級 Department & Year	學三 Course-Offering Department
修別 Type	學程 Program	學分數/時間 Credit(s)/Hour(s)	3.0/3.0
授課教師 Instructor	/李同蘇		
先修課程 Prerequisite	/#統計學(一)		
課程描述 Course Description			
<p>This class intends to lay a solid foundation for students in investment process and portfolio management areas. This class does not guarantee any success in investment in any stock market after completion of this course. Instead, by taking this class, we hope student will be able to have a good judgment in selecting an investment vehicle to avoid any unnecessary loss. Investment process is a complicate process. Anything beyond the textbook and lecture are helpful. Broadening your scope of intake of any information beyond the investment will be a plus for investment decision-making. Therefore, the outside class readings are as equally important as the textbook and lecture.</p>			
課程目標 Course Objectives			
<p>理財已成為現代人之必備知識，本課程之目的為盡量涵蓋大部份投資理論及教授正確之投資觀念，最後藉由摹擬投資遊戲給予學生機會練習投資之技巧，本課程並不傳授所謂的明牌，但是會引導學生以系統化的方式思考如何正確投資以避免嚴重之錯誤投資</p>			
圖示說明 Illustration : ● 高度相關 Highly correlated ○ 中度相關 Moderately correlated			
授課進度表 Teaching Schedule & Content			
週次 Week	內容 Subject/Topics	備註 Remarks	
1	Introduction, Ch 1		
2	Security markets, mutual funds and asset classes, Ch 2, 3, 4		
3	Risk and return, Ch 5		
4	Efficient diversification, Ch 6		
5	CAPM and APT, Ch 7		
6	EHM, Ch 8		
7	Behavioral finance and technical analysis, Ch 9		
8	Bond prices and yields, Ch 1		
9	期中考試週 Midterm Exam		
10	Managing bond portfolio, Ch 11		
11	Macroeconomic and industry analysis, Ch 12		
12	Equity valuation, Ch 13		
13	Financial statement analysis, Ch 14		

14	Option markets, Ch 15	
15	Option valuation, Ch 16	
16	Futures markets and risk management, Ch 17	
17	Evaluation investment performance, Ch 18	
18	期末考試週 Final Exam and final project due	

教學策略 Teaching Strategies

- 課堂講授 Lecture
  分組討論 Group Discussion
  參觀實習 Field Trip  
 其他 Miscellaneous:

教學創新自評 Teaching Self-Evaluation

創新教學 (Innovative Teaching)

- 問題導向學習 (PBL)
  團體合作學習 (TBL)
  解決導向學習 (SBL)  
 翻轉教室 Flipped Classroom
  磨課師 Moocs

社會責任 (Social Responsibility)

- 在地實踐 Community Practice
  產學合作 Industry-Academia Cooperation

跨域合作 (Transdisciplinary Projects)

- 跨界教學 Transdisciplinary Teaching
  跨院系教學 Inter-collegiate Teaching

- 業師合授 Courses Co-taught with Industry Practitioners

其它 other:

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學期成績計算及多元評量方式 Grading & Assessments

配分項目 Items	配分比例 Percentage	多元評量方式 Assessments							
		測驗 會考	實作 觀察	口頭 發表	專題 研究	創作 展演	卷宗 評量	證照 檢定	其他
平時成績 General Performance	10%	✓	✓						
期中考成績 Midterm Exam	35%	✓							
期末考成績 Final Exam	40%	✓							
作業成績 Homework and/or Assignments	15%		✓						
其他 Miscellaneous (_____)									

評量方式補充說明

Grading & Assessments Supplemental instructions

Class etiquette: Experience indicates that students with regular attendance of class have higher grades than those who did not. Followings are basic class etiquette. Turn off your mobile phone before class. No loud chatting allowed in the class. Having food or drink in the class is not encouraged. Any irrational behavior in the class will not be tolerated. Any violation of the class etiquette will be penalized by reduction in your grade

教科書與參考書目 (書名、作者、書局、代理商、說明)

Textbook & Other References (Title, Author, Publisher, Agents, Remarks, etc.)

Essentials of Investments, Bodie, Kane and Marcus, 11th ed., 2019, McGraw Hill Education, 華泰代理

課程教材網址(含線上教學資訊, 教師個人網址請列位於本校內之網址)

Teaching Aids & Teacher's Website(Including online teaching information. Personal website can be listed here.)

其他補充說明 (Supplemental instructions)