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②图玄束華大學

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		113/2	
課程名稱(英文) Course Name in English	Investments							
科目代碼 Course Code	EC34330	系級 Department & Year	epartment 學三		開課單位 Course-Offering Department	經濟學系		
修別 Type	學程 Program	學分數/時間 Credit(s)/Hour(s)			3.0/3.0			
授課教師 Instructor	/李同龢							
先修課程 Prerequisite	/#統計學(一)							

課程描述 Course Description

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.

上課禮儀:無故缺課超過三次(不含第三次),學期成績一律不及格。任何請假均需透過學校的請假系統,任何請假均需附合法有效之證明文件,請假必須於無法到課日前後兩個星期內完成,電子郵件請假不算正式的請假,老師也不會回覆你的請假電子郵件。

在加退選後,上課採固定座位方式,點名按照你的座位為主。上課不得有影響老師及同學們上課行為,違反者視情節嚴重性,扣減學期成績。上課不准使用任何電子裝置,例如手機、平版電腦、筆電等電子裝置,使用平版電腦及筆電僅限於製作筆記,違反者,課堂參與分數一律以零分計算。上課不得以任何方式錄影、錄音或照相。

期中考及期末考一定要考,如無故不考其中任何一考試,學期成績一率不及格

課程目標 Course Objectives

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

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	No class,	

9	期中考試週 Midterm Exam						
10	Bond prices and yields, 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	期末考試週 Final Exam and final project presentation						
18	flexible class						
	教 學 策 略 Teaching Strategies						
✓ 課堂講授 Lecture							
LL (9 A) A(/ >= M 1 L							
創新教學(教學創新自評 Teaching Self-Evaluation 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							
社會責任(Social Responsibility)							
在地實踐Community Practice 產學合作 Industy-Academia Cooperation							
跨域合作(Transdisciplinary Projects)							
跨界教學Transdisciplinary Teaching 跨院系教學Inter-collegiate Teaching							
其它 other:							

學期成績計算及多元評量方式 Grading & Assessments									
配分項目	配分比例 Percentage	多元評量方式 Assessments							
Items		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(含出缺席) General Performance (Attendance Record)	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			日十七						

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.)

投資學 理論與實務 第12版 林哲鵬 譯 華泰出版

參考書: Investments, Bodie, Kane and Marcus, 12th ed., 2021, 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)