



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		114/2			
課程名稱(英文) Course Name in English	Investments							
科目代碼 Course Code	FIN_B0120	系級 Department & Year	學二	開課單位 Course-Offering Department	財務金融學系			
修別 Type	學程 Program	學分數/時間 Credit(s)/Hour(s)	3.0/3.0					
授課教師 Instructor	/羅德謙							
先修課程 Prerequisite								

課程描述 Course Description

Investment is one of the core courses in Finance area. We study several important and interesting financial instruments, which include certificates of deposits, treasury bills, treasury notes, debt securities, and stock shares in this course. We also study how to evaluate asset prices by fundamental pricing models, such as capital asset pricing model (CAPM) and arbitrage pricing theory (APT). Students who would like to seek jobs relevant to commerce/business, or would like to do smart and independent investing, are encouraged to take this course.

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

授課進度表 Teaching Schedule & Content

週次 Week	內容 Subject/Topics	備註 Remarks
1	Introduction	
2	Chap 1: Investments: Background and Issues	

3	Chap 2: Assets Classes and Financial Instruments	
4	Chap 3: Securities Markets	
5	Chap 4: Mutual Funds and Other Investment Companies	
6	Chap 5: Risk and Return: Past and Prologue	
7	Holiday	
8	The First In-Class Assignment	
9	期中考試週 Midterm Exam	
10	Chap 6: Efficient Diversification	
11	Chap 7: Capital Asset Pricing and Arbitrage Pricing Theory	
12	Final Presentation	
13	Final Presentation	
14	Final Presentation	
15	Final Presentation Chap 8: The Efficient Market Hypothesis	
16	The Second In-Class Assignment	
17	Preparation Week	
18		

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:

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
平時成績(含出缺席) General Performance (Attendance Record)	5%			✓				
期中考成績 Midterm Exam	40%	✓						
期末考成績 Final Exam	0%							
作業成績 Homework and/or Assignments	20%		✓					In-Class Assignments
其他 Miscellaneous (Interactive Presentation)	35%			✓				

評量方式補充說明
Grading & Assessments Supplemental instructions

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.)

Bodie, Kane, and Marcus, "Essentials of Investments", McGraw Hill

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.)

NDHU E-learning Webpage

其他補充說明 (Supplemental instructions)