

管院碩士班(含碩專班)課程大綱

MS/MA Program Syllabus

系所 Department	國際財管 IMF	必選修 compulsory/elective	必修 Compulsory
課程名稱 Course title	投資管理學 Investment Analysis	學分數 Credit(s)	3
課號 Course Code	5355202	全英文授課 English Taught (EMI)	是(Yes)
學年/學期 academic year/Semester	114-1 學期 Fall semester 2025	上課地點 Classroom	College of Management 103
講授教師 Instructor	鄧氏霞妝 Thi-Ha-Trang Dang (Lucy)	上課時間 Time	1:10am – 4:00pm Tuesday
教師辦公室&諮詢時間 Instructor office & office hour	College of Management 502 Tuesday 4:10 pm – 5:00 pm By appointment	教師聯絡資訊 Instructor Contact	Phone:05-2720411 ext 34138 Email: lucydang@ccu.edu.tw
助教 Teaching Assistant		助教 聯絡資訊 TA contact	Email:
先修課程 Pre-requisite courses	Statistics 統計學 Financial Management 財務管理		
學習目標 Learning Objective	By the end of this course, students should be able to: ● Understand the basic types of financial assets and their trading mechanisms. ● Explain the relationship between risk and return in investing. ● Discover the concept of portfolio diversification and its significance. ● Get familiar with common models used to evaluate investments (e.g., CAPM). ● Understand how to read and evaluate bond and stock information. ● Use simple tools (such as Excel) to solve investment problems. ● Practice working with others through presentations and group discussions. ● Enhance your financial thinking by completing exercises, quizzes, and homework assignments. ● Develop the ability to explain investment ideas in a clear and logical way.		
課程概述 Course Descriptions	This course introduces students to the fundamentals of investment analysis and portfolio management. Students will explore risk and return, asset allocation, diversification, asset pricing models, and the valuation of stocks and bonds. The course emphasizes hands-on learning through regular homework assignments, in-class problem-solving, and the use of Excel for financial calculations. Active participation is encouraged through student-led homework reviews, in-class discussions, and quizzes. Midterm and final exams will test students' understanding of core principles and their ability to apply them to investment decision-making. To		

		accommodate different learning speeds, the instructor may adjust the pace and content as needed to support student comprehension and progress. 本課程旨在幫助學生建立投資分析與投資組合管理的基本概念。內容涵蓋風險與報酬、資產配置、分散化投資、資產定價模型，以及股票與債券的評價方法。課程強調動手操作與實務應用，透過作業練習、課堂計算與 Excel 操作，加強學生對投資工具與分析方法的理解。學生將參與作業講解、課堂討論與小考，以促進主動學習與批判性思考。期中與期末考試則評量學生對核心理論的掌握及其應用於投資決策的能力。為配合學生的學習進度與理解狀況，教師將視班級整體表現適時調整授課內容與進度。			
對應 AOL 職能素養(AOL Competency)					
職能素養 3(Competency 3): 問題解決能力 Problem Solving Skills			職能素養 1(Competency 1): 成本效益分析 Cost-Benefit Analysis		
課程類別 Course Attributes	☐ 人文關懷課程(Humanities Caring) ☐ 競賽專題課程(Competition) ☒ 問題導向課程(Problem-solving) ☐ 專題導向課程(Project-based) ☐ 實作課程(Practice-based) ☐ 總整課程(Capstone)				
教材編選 Teaching materials	☒ 自製簡報(self-made PPTs) ☐ 課程講義(Teaching Notes) ☐ 自編教科書(self-made textbooks) ☐ 教學程式(programming) ☐ 自製教學影片(self-made video) ☐ 其他(Others)				
教學資源 Teaching Resources	☒ 課程網站(Website) ☐ 實習網站(Intern Web) ☒ 教材電子檔供下載(Downloadable Files)				
教科書/參考書 Textbooks/References	Bodie, Z., Kane, A., and Marcus, A. (2024). <i>Investments</i> . 13th ed., McGraw-Hill.				
評量方式(請填百分比) Assessment	課堂參與 Participation	15%	個案討論 Case study	%	
	作業 Homework	25%	專題 Project	%	
	小考 Quiz	15%	其他 1 other ()	%	
	期中考 Midterm	20%	其他 2 other ()	%	
	期末考 Final	25%	其他 3 other ()	%	
	報告 Presentation	%	其他 4 other ()	%	
其他說明 Other description	Participation (15%) ● Active participation and discussion are essential components of this course. ● Active participation is essential. Attendance is recorded each week. One absence is permitted without penalty. For additional absences, 50% credit is given if prior notice is provided; otherwise, the session counts as zero. Students absent for over one-third of classes may fail unless valid documentation of extraordinary circumstances is provided. ● Proxy attendance is strictly prohibited and will result in course failure. ● Attendance alone does not constitute participation. Students are expected to actively engage by answering questions, contributing to discussions, and asking thoughtful questions. Each instance of engagement will be observed				

and counted toward the participation grade. To ensure the best level of engagement, phone use during class is allowed only for activities directly related to the course.

Homework (25%)

- Homework is assigned individually and reinforces key concepts. All work must be typed, submitted as a PDF via eCourse2, and named: *Homework number and topic _ Student Name _ Student ID* (e.g., H1 Capital allocation_John Smith_0123456789). The student's name and ID number are on the first page. A portion of the homework grade will be assigned for formatting, naming, submission compliance, and clarity of writing. Homework is due by 23:59 on the Monday following the assignment date. *Late submissions incur a 50% penalty*. No makeup homework or assignment will be granted to compensate for late submissions.
- Students are required to lead the correction of homework at least once during the semester. Depending on the class size, each student may be assigned up to three sessions. At the beginning of each class, the assigned student will present a step-by-step walkthrough of the homework solution and facilitate a class discussion. The total time allocated for this activity is 30 minutes.

Quiz (15%)

- A short quiz will be given in each class to review key concepts and assess understanding. No make-up quizzes will be provided unless supported by an officially documented emergency.

Midterm Exam (20%) and Final Exam (25%)

- The midterm and final exams are open-book, *no-internet* written tests. It evaluates students' conceptual understanding, ability to interpret regression results, explain key econometric principles, and apply basic calculations. The exam emphasizes reasoning and clear explanation over memorization. There will be no make-up exam unless there is documented evidence of extraordinary circumstances. Students are required to attend the midterm on the scheduled date. If granted, a make-up exam may be more difficult and in a different format.

課程規劃表 Course Schedule

週次 Week	日期 Date	內容 Description	教材章節 Textbook	其他說明 Remark
1.	09/09	Course Introduction		
2.	09/16	Asset Allocation, Classes, and Financial Instruments	Chapters 1 & 2	
3.	09/23	How Securities Are Traded Mutual Funds and Other Investment Companies	Chapters 3 & 4	
4.	09/30	Risk, Return, and the Historical Record	Chapter 5	
5.	10/07	Capital Allocation to Risky Assets	Chapters 6	
6.	10/14	Efficient Diversification	Chapters 7	
7.	10/21	International Diversification	Chapter 25	
8.	10/28	The Capital Asset Pricing Model	Chapter 9	
9.	11/04	Midterm exam	Cover chapters from week 1 to week 8	
10.	11/11	Arbitrage Pricing Theory and Multifactor Models of Risk and Return	Chapter 10	
11.	11/18	The Efficient Market Hypothesis and Behavioral Finance	Chapters 11 & 12	
12.	11/25	Bond Prices and Yields The Term Structure of Interest Rates	Chapters 14 & 15	
13.	12/02	Managing Bond Portfolios	Chapter 16	
14.	12/09	Equity Valuation Models	Chapter 18	
15.	12/16	Portfolio Performance Evaluation	Chapter 24	
16.	12/23	Final exam	Cover chapters from week 1 to week 15	
17.	12/30	Self-study flexible week		

NOTE: The course schedule and activities are subject to change based on students' learning progress.