

Investments

Instructor: Fang-Chang Kuo

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Office Hours: Tue. 11:00am-1:00pm

Class Hours: Tue. 1:10pm-4:00pm

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Class Room: College of Management 426

TA: TBA

TA's E-mail: TBA

Course Description

This course aims at providing a broad introduction to investments. Students will explore theories and applications related to portfolio theory, asset allocation, asset pricing, stock return predictability and anomalies, fixed income pricing, and security analysis.

Course Materials

Textbook:

- Z. Bodie, A. Kane, and A. Marcus. *Essentials of investments*. 12th edition, 2022

References:

- Z. Bodie, A. Kane, and A. Marcus. *Investments*. 11th edition, 2018

Grading Policy

- Attendance 10%; Weekly Reports 30%; Midterm 30%; Final 30%

Course Structure

Weekly Reports

Weekly reports of financial markets must be submitted at the beginning of the lecture. Submission via email will not be accepted. No late reports will be accepted under any circumstances. A group will be randomly selected to present a brief summary of market dynamics.

Exams

There will be two in-class exams in this course. Exams are closed book and consulting books, notes, or electronic devices will not be allowed. There will be no make-up exams. If you miss one exam due to documented illness or emergency, your final grade will be discounted and computed out of the other exam that you did completed.

Course Plan

1. Introduction
2. Asset Classes and Financial Instruments
3. Securities Markets
4. Portfolio Theory and Practice
5. Pricing Models in Capital Markets
6. Market Efficiency
7. Fixed-Income Securities
8. Security Analysis
9. Options and Futures
10. Evaluating Investment Performance
11. International Diversification