

投資策略與管理(EMBA)

Spring, 2026

Instructor: 鄭揚耀 博士

Office: 357

Phone: 05-2720411-34207

Office Hours: By appointment

Email: finlyc@ccu.edu.tw

Textbooks and Supplies

投資學基本原理與實務，9版 謝劍平，智勝文化

Object

This class will provide students with a basic knowledge of investments. A list of topic to be covered is provided on the next page. Although the textbook is filled with complex equations and historical data, there is no substitute common sense. Returns above the risk-free rate involve risk!

Grades

Your grade will be based on homework, the term project and attendance.

Project

Expert vs. Louie

Portfolio Performance Evaluation

Please fill out the form below and bring it to next Sunday Class. To test your skill as portfolio managers, you'll need to pick a portfolio. Later in the semester, I will ask you to summarize your performance using some of tools we have learned. To begin this process, pick a fake portfolio of 5 stocks. Your purchase will be made on 3/9 (1:30 PM) closing price. You can purchase any stock traded on the Taiwan Stock Exchange (no short sales, funds, derivatives, bonds, or money market instruments).

The Benchmarks

You will be battling the following 2 standards: a randomly chosen portfolio picked by my son and the Taiwan Weighted Stock Index.

The Prize

First place may receive a prize. If my son wins, I will give him a toy.

Your Picks

To begin you have \$10,000,000 initial investment for maxima 5 stocks. For verification, list your 5 stocks below, tear off the list and bring it to class on next class, the closing price on 5/11 will determine how many shares you'll own.

Stock	Code

Planned Topics

Week	
1	投資基本概念
2	金融工具與市場
3	報酬與風險
4	股票市場與交易實務
5	基本分析與技術分析、股票評價
6	期末報告