

南臺科技大學 107 學年度第 1 學期課程資訊

課程代碼	65D00U01
課程中文名稱	投資學
課程英文名稱	Investment
學分數	3.0
必選修	選修
開課班級	四國際商務三甲
任課教師	朱岳中
上課教室(時間)	週二第 2 節(S512) 週二第 3 節(S512) 週二第 4 節(S512)
課程時數	3
實習時數	0
授課語言 1	英語
授課語言 2	
輔導考照 1	
輔導考照 2	
課程概述	<p>The major areas of investment can be summarized into two categories: corporate investment and personal investment. This course will mainly focus on personal investment. Further, personal investment can be divided into two parts: the real assets investment and financial products investment.</p> <p>Investment will introduce the characteristics of financial products, related financial institutions, classification of financial markets, the market trading norms, the skills of investment, and various risks. Investment management also means planning, organizing, and directing the invest activities that investors can make the right and appropriate investment decisions.</p> <p>This course is to equip students with the knowledge and capability to make investment decisions. Investment decisions include capital allocation, investment in fixed assets, investment opportunity selection, risk and return evaluation, etc. This course also will equip students to engage invest related work in the future.</p>
先修科目或預備能力	
課程學習目標與核心能力之對應	<p>※編號，中文課程學習目標，英文課程學習目標，對應系指標</p> <p>-----</p> <p>1.了解財務報表基本分析、國內外總體經濟對投資組合管理、績效運作之影響。 , Understand the basic analysis of financial statements, the overall economy at home and abroad on the portfolio management, the impact of the performance of the operation. , 1 國際商務知識</p>

	<p>2.能利用 excell 軟體分析資料並正確解讀財務報表。 , Can use excel software to analyze the data and correctly interpret the financial statements. , 2 電腦應用技能</p> <p>3.能觀察國內外貨幣市場、證券市場之資料轉換成資訊統合建構相關管理投資決策。 , Can observe the domestic and foreign money market, securities market information into the integration of information management related to investment decision-making. , 4 資料分析能力</p> <p>4.充分了解投資理財的決策角色，達成企業的目標及建立企業社會責任。 , Fully understand the decision-making role of investment and financial management, to achieve business goals and the establishment of corporate social responsibility. , 8 企業倫理</p> <p>5.具備職場上之創新、國際觀及多元化專業知識的能力。 , With the workplace of innovation, international view and the ability of diversified expertise. , 12 邏輯思考能力</p> <p>6.主動跨領域整合新知與積極參與多元學習，建構研究能力。 , Active integration of new knowledge across disciplines and actively participate in multi-learning, to build research capacity. , 13 主動負責學習</p>
中文課程大綱	<ol style="list-style-type: none"> 1.投資基本概念 2.報酬與風險 3.投資市場分析 4.產業分析 5.個別投資標的分析 6.借貸市場 7.新金融商品
英/日文課程大綱	<p>The course will cover the following important topics:</p> <ol style="list-style-type: none"> 1. General conception 2. Return and Risk 3. Financial products – equity securities 4. Financial products – fixed incomes securities 5. Investment market analysis. 6. Industry Analysis. 7. Underlying asset analysis. 8. Credit and Debit market. 9. New financial instruments.
課程進度表	<ol style="list-style-type: none"> 1. The Investment Environment 2. Asset Classes and Financial Instrument 3. How Securities Are Traded 4. Mutual Funds and Other Investment Companies 5. Risk, Return and the Historical Record 6. Capital Allocation to Risky Assets

	<p>7. Index Models</p> <p>8. The Efficient Market Hypothesis</p> <p>9. Behavioral Finance and Technical Analysis</p> <p>10. Empirical Evidence on Security Returns</p> <p>11. Macroeconomic and Industry Analysis</p> <p>12. Portfolio Performance Evaluation</p> <p>13. International Diversification</p>
教學方式與評量方法	<p>※課程學習目標，教學方式，評量方式</p> <p>-----</p> <p>了解財務報表基本分析、國內外總體經濟對投資組合管理、績效運作之影響。 ， 課堂講授，筆試</p> <p>能利用 excell 軟體分析資料並正確解讀財務報表。 ， 實作演練，書面報告</p> <p>能觀察國內外貨幣市場、證券市場之資料轉換成資訊統合建構相關管理投資決策。 ， 課堂講授，筆試</p> <p>充分了解投資理財的決策角色，達成企業的目標及建立企業社會責任。 ， 課堂講授，筆試</p> <p>具備職場上之創新、國際觀及多元化專業知識的能力。 ， 實作演練，作業</p> <p>主動跨領域整合新知與積極參與多元學習，建構研究能力。 ， 成果驗收，作業</p>
指定用書	<p>書名：Investments</p> <p>作者：Zvi Bodie, Alex Kane, Alan J. Marcus</p> <p>書局：McGraw Hill Education</p> <p>年份：2018</p> <p>ISBN：9789863413776</p> <p>版本：11/e</p>
參考書籍	Financial Magazine, Newspaper, Website
教學軟體	No
課程規範	No