

課程名稱 (course name)	股市投資模擬實作 Stock Investment Simulation and Practice				
開課系所班級 (dept. & year)	通識教育中心	學分 (credits)	3	規劃教師 (teacher)	科管所 張樹之
課程類別 (course type)	必修	授課語言 (language)	中文或英文	開課學期 (semester)	上或下
課程簡述 (course description)	<p>本課程將介紹股市投資相關的重要知識，並模擬實作股票投資方式。除了介紹投資管理的核心概念，並以股票為主要的投資載具外，亦將選擇性地介紹其他的投資載具，如：固定收入證券、債券、抵押貸款支撐證券、共同基金、管理賬戶、選擇權(權證)、商品期貨或金融期貨。</p> <p>本課程強調股票投資交易模擬實驗，其交易實驗結果將成為學期成績的重要依據。</p> <p>This course will introduce the core knowledge of stocks, stock markets and related investment approaches, by using the simulation approach to conduct stock investment experiments. In addition to the core concepts of investment management with stocks as the main investment vehicles, this course may selectively introduce other important investment instruments, such as: fixed-income securities, bonds, mortgage-backed securities, mutual funds, managed accounts, options (warrants), commodities and financial futures.</p> <p>The course will focus on stock investment experiments using simulation techniques. Experiment results will be evaluated as significant portions of final score for this course.</p>				
先修課程 (prerequisites)	無				
課程目標與核心能力關聯配比(%) (relevance of course objectives and core learning outcomes)					
課程目標	course objectives	核心能力 core learning outcomes	配比 合計 100%		
本課程的目標是講授證券投資與財富管理的基本概念，透過介紹證券，如股票、固定收益證券、共同基金、管理賬戶、和衍生產品等各式金融工具，幫助學生學習個人股市投資與其他證券投資的基本概念。學生將從本課程的內容可學習	This course aims to teach basic concepts of securities investment and wealth management, by introducing various financial instruments, such as stocks, fixed-income securities, mutual funds, managed accounts, derivatives, among others. Students will leave the course with the fundamental	人文素養	0%		
		科學素養	40%		
		溝通能力	10%		
		創新能力	20%		

到金融投資工具的基本知識與資訊，並得以進一步發展適合其個人的股票投資與證券投資計劃。	information and knowledge of financial instruments for further developing their appropriate personal stocks and securities investment plans.	國際視野	30%
		社會關懷	0%

**課程目標之教學方法與評量方法
(teaching and assessment methods for course objectives)**

教學方法 (teaching methods)	學習評量方式 (evaluation)
Lectures and Online Experiments	1. Class Participation and Quiz 10% 2. Investment Project 40% 3. Experiment Score 50%

**授課內容 (單元名稱與內容、習作 / 考試進度、備註)
(course content and homework / tests schedule)**

單元名稱與內容	Course Content
1 課程概述	Course Overview
2 投資環境	The Investment Environment
3 金融市場與交易	Financial Market and Transactions
4 投資資訊與股票交易	Investment Information and Stock Transaction
5 模擬線上交易系統	Simulated Online Trading Systems
6 投資風險與回報	Investment Risk and Return
7 投資組合管理	Portfolio Management
8 一般股票與股票分析	Common Stocks & Stock Analysis
9 股票評價	Stock Valuation
10 效率市場與行為財務學	Market Efficiency and Behavioral Finance
11 技術分析 1(概述)	Technical Analysis 1 (Overview)
12 技術分析 2 (移動平均線, K 線..)	Technical Analysis 2 (MA, K-Line, ...)
	Optional Topics
13 固定收入證券	Fixed-Income Securities
14 債券與債券估價	Bonds & Bond Valuation
15 管理賬戶與共同基金	Managed Accounts & Mutual Funds
16 選擇權與權證	Options & Warrants
17 商品期貨與金融期貨	Commodities & Financial Futures

**教科書與參考書目 (書名、作者、書局、代理商、說明)
(textbook & other references)**

Textbook: Gitman, L.J. and Joehnk, M.D. (2008), Fundamentals of Investing 10/e, ISBN: 9780321468512, Pearson. (滄海書局總代理)

References:

- Rose, P.S. and Marquis, M.H. (2011), Money and Capital Markets 11/e, ISBN: 9780078116858, McGraw-Hill.
- Parameswaran, S.K. (2011), Fundamentals of Financial Instruments: An Introduction to Stocks, Bonds, Foreign Exchange, and Derivatives, ISBN: 9780470824900, John Wiley.
- Other online resources and materials to be announced in class.

課程教材（教師個人網址請列在本校內之網址）
(teaching aids & teacher's website)

另行公告

課程輔導時間
(office hours)

另行公告