

# Investments (投資學) 2009-09-17

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Office Hour: MON. 3:30pm ~ 6:30pm

**Required Textbook:** Bodie, Kane and Marcus, **Essentials of Investments**,  
第\_6\_版 ; McGraw Hill **【新月有代理】**.

**Additional Materials :** (1) Handouts ◦ (2) Journal papers & Magazine Articles ◦

## Evaluation :

Participation & 5 Homework Assignments	30% ◦
Midterm Exam	35% ◦
Final Exam	35%

**Tentative Schedule** (You are encouraged to participate actively in classroom discussions.) :

2009-09-16	Ch5 & Handouts	Risk & Returns
2009-09-23	Ch6 & Ch7	Diversifying Individual Risks CAPM & APT Models
2009-09-30	Ch8	Efficient Market Hypothesis
2009-10-07	Ch 1 ◦ Ch 2 (2.1 ~ 2.2)	Money Market & Capital Market
2009-10-14	Ch 2.3 ~ 2.5 & Handouts	Indexes & <b>Benchmarks</b> ◦ Derivative Security Market
2009-10-21	Ch 3	Market Mechanism Financial Instruments
2009-10-28	Ch4	Mutual Funds 個案分析 (華倫.巴菲特 1995 年)
2009-11-04	Ch9, Ch10 & Handouts	Fixed Income Securities (1)
2009-11-11	Ch9, Ch10 & Handouts	Fixed Income Securities (2)
	<b>期中考試 Midterm Exam (Ch 1 ~ Ch 10)</b>	
2009-11-18	Ch11	Macroeconomic and Industry Analysis
2009-11-25	Ch12	Fundamental Analysis
2009-12-02	Ch13	Financial Statement Analysis
2009-12-09	Ch 17 Ch19	Performance Evaluation Behavioral Finance & Technical Analysis

2009-12-16 Ch 20 & Ch 21 Taxes, Inflation, Investment  
Policies & Strategies 、  
2009-12-23 Ch14 Ch 15 Ch 16 Derivative Securities (1)  
2009-12-30 Ch14 Ch 15 Ch 16 Derivative Securities (2)  
2010-01-01 Happy New Year  
2010-01-06 結構債券 Hand-outs 家庭理財商品(含結構債券)  
2010-01-13 Final Exam (Ch 10 ~ Ch 21)