

# National Cheng Kung University

## Modular Course 2023 Summer Program

### 投資學的應用與研究

#### Investments: Application and Study

Instructor	Affiliation	Graduation (Ph.d.)
Ann Shawing Yang	National Cheng Kung University Institute of International Management	SCIENCE PO - IEP de Paris (法國巴黎高等政治學院)

Course Type	Course Credit	Class Capacity (Maximum)
Lecture + Recitation	1	35

#### Student Background

Students from all college are welcome

#### Difficulty

Challenging  Medium Well  Medium  Entry Level ( Basic)

#### Format of The Course

Lecture 70% , Discussion 10% , Report 20%

#### Note:

Group presentations include literature review of 2 to 3 academic journal articles selected from the finance journal list provided in class. Each group must work on different journal articles and different topics. Academic article literature review – each group search for 2 to 3 academic journal articles related to stock market or investments. 2 students will be responsible for 1 article. Depending on the number of students per group, the number of articles will be included. For example, 4 students per group will be responsible for 2 articles. If group members reduce to 1 student, student may join other groups.

#### Grading Policy

In class exam 70 % : 隨堂小考；周二至周四，每日 30 分鐘。

Report 30% : Turnitin similarity report less than 10%

#### Code of Conduct for The Course

1. Late presentations/ submissions or no-submission of assigned work count as zero grade.
2. None-participation in exam count as zero grade.

#### Course Description

This course aims to introduce basic concept and knowledge on investments, including macroeconomic and industry analysis, financial ratios, behavioral finance and technical analysis, and mutual funds. We will introduce the various chapters, analyze exercises and problems, and discuss investment related academic research articles.

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### Timetable and Syllabus

Peroid	Timetable	Syllabus
7/3(MON)	9:00-12:40	<b>Chapter 17 Macroeconomic and Industry Analysis</b> <ul style="list-style-type: none"> <li>• Literature review sample (Academic journal article lists and journal search) / Turn-it-in similarity introduction</li> <li>• Concept check 17.4</li> <li>• News reading – SVB (Signature Bank) contagion</li> </ul>
7/4(TUE)	9:00-12:40	<b>Chapter Financial Ratios (Financial Statement Analysis) 19</b> <ul style="list-style-type: none"> <li>• Academic article – Aerospace industry innovation</li> </ul> <b>Exam 1 - Chapter 17 (open book; 30 min.)</b>
7/5(WED)	9:00-12:40	<b>Chapter 12 Behavioral Finance and Technical Analysis</b> <ul style="list-style-type: none"> <li>• News reading – Warren Buffet and TSMC</li> </ul> <b>Exam 2 - Chapter 19 (open book; 30 min.)</b>
7/6(THU)	9:00-12:40	<b>Chapter 4 Mutual Funds and Other Investment Companies</b> <ul style="list-style-type: none"> <li>• Academic article – Taiwan Stock Exchange and Holidays</li> <li>• Exam 3 - Chapter 12 (open book; 30 min.)</li> </ul>
7/7(FRI)	9:00-12:40	<ul style="list-style-type: none"> <li>• Exam 4 - Chapter 4 (open book; 30 min.)</li> <li>• English oral presentation</li> </ul> <b>Note:</b> <ul style="list-style-type: none"> <li>☆ 20 mins. presentation on 4 academic journal articles related to stock market or investment</li> <li>☆ ppt slides must upload to Moodle system by deadline.</li> <li>☆ academic journal articles must be referred from journal article lists.</li> <li>☆ ppt slides must show Turnitin similarity report less than 10%.</li> </ul>

### Goal of the Course

1. Learn the importance of economic environment and industry characteristics
2. Learn the importance of behavioral influences of investors.
3. Learn the various financial ratios for investment analysis.

### The Importance, Cross-Over Disciplinary and Contemporary of The Curriculum

1. This course is important in providing fundamental background and knowledge-building on stock market and investments.
2. The course introduces the factors influencing investor decision making; including macroeconomic and industry analysis, financial ratios, and investor behavior.
3. This course provides cross-disciplinary trainings on skills related to economics, finance, and Investor behavior.

### Remarks

#### References :

*Investments*, 12<sup>th</sup> edition, Bodie, Kan, Marcus, International Student Edition, McGraw-Hill Education

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