# 朝陽科技大學 099學年度第2學期教學大綱
# Fund Investment & Management 基金投資與管理

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| **當期課號** | 1226 | **Course Number** | 1226 |
| **授課教師** | 吳志松 | **Instructor** | WU,CHIH SUNG |
| **中文課名** | 基金投資與管理 | **Course Name** | Fund Investment & Management |
| **開課單位** | 保險金融管理系(四日)二A | **Department** | |
| **修習別** | 選修 | **Required/Elective** | Elective |
| **學分數** | 2 | **Credits** | 2 |
| **課程目標** | 1. 使學生了解共同基金市場架構，包含基金商品種類、設計原理、行銷策略等。<br>2. 使學生能熟悉基金投資與市場行情<br>3. 使學生具保險金融從業人員之專業態度<br>4. 可做爲學生未來進修之基礎 | **Objectives** | 1. Enabling students mutual fund market structure including types of products, design principle and marketing strategies.<br>2. Enabling studentsto be familiar with fund investment and market current prices.<br>3. Enabling students to have professional attitudes in insurance and finance industry.<br>4. Serving as studentsfoundation on future study. |
| **教材** | 1.基金管理 陳登源,巫慧燕,黃建勝 合著<br>雙葉書廊有限公司<br>2.財富管理 理論與實務(投資組合) 鄭義 著<br>新陸書局股份有限公司<br>3.基金理財的六堂課 邱顯比 著<br>天下遠見出版股份有限公司<br>4.Smart致富月刊 | **Teaching Materials** | 1. Economics Theories Applications<br>2. Macroeconomics Theories<br>3. Pratice of Investment and Finance<br>4. Smart monthly publication |
| **成績評量方式** | 1. 平時(出席上課及分組) 30 %<br>2. 期中考試 30 %<br>3. 期末考試 40%<br>4. 理財證照加分 | **Grading** | 1. Attandance & Group Grade 30%<br>2. Mid-Term Exam. 30%<br>3. Final Exam. 40%<br>4 Bonus: certifications of managing finances |
| **教師網頁** | | | |
| **教學內容** | 03/04 資產配置<br>03/11 共同基金的發展<br>03/18 共同基金的組織<br>03/25 共同基金的運作<br>04/01 基金管理法令<br>04/08 基金的分類<br>04/15 特殊基金<br>04/22期中考<br>04/29債券型基金投資策略<br>05/06 股票型基金投資策略<br>05/13 組合型基金投資策略<br>05/20 共同基金行銷<br>05/27 共同基金服務<br>06/03 基金績效評估<br>06/10 基金的選擇<br>06/17 退休基金管理<br>06/24 期末考試 | **Syllabus** | Mar./04 pension fund asset-allocation<br>Mar./11 mutual fund development<br>Mar./18 mutual fund organization<br>Mar./25 mutual fund operate<br>Apr./01 fund management Laws<br>Apr./08 muntulfund type<br>Apr./15 special fund<br>Apr./22 Mid-Term EXAM.<br>Apr./29 bond investment strategy<br>May./06 stock fund investment strategy<br>May./13 aggressive fund investment strategy<br>May./20 mutual fund marketing<br>May./27 mutual fund service<br>Jun./03 fund performance evaluation<br>Jun./10 mutual fund selection<br>Jun./17 pension fund management<br>Jun./24 FINAL EXAM. |

尊重智慧財產權，請勿非法影印。