The Institute of International Management is dedicated to provide quality teaching and research environment enabling students with broad and integrated knowledge of management in preparation for successful careers in business, government agencies or academic institutions.

General Program Learning Goals (goals covered by this course are indicated):

- Graduates should be able to communicate effectively verbally and in writing.
- Graduates should solve strategic problems with a creative and innovative approach.
- Graduates should demonstrate leadership skills demanded of a person in authority.
- Graduates should possess a global economic and management perspective.
- Graduates should possess the necessary skills and values demanded of a true professional.

Instructor: Dr. Ann Shaving Yang  
Office: IMBA office  
Office Hours: By appointment  
Phone: ext. 53565  
Email: annsyang@mail.ncku.edu.tw

Pre-requisites:
Fundamental knowledge in statistics, accounting, and economics are strongly recommended. If you find yourself lacking in the above mentioned pre-requisite courses, please show up in person on the 1st class for an interview with Prof. Yang.

Course Objectives:
This course aims to introduce the investment environment of security markets, risk-return trade-off between various financial assets, and asset allocation methods and evaluations accompanied by fundamental theories and concepts of investing. Discussion topics include portfolio theory and practice, equilibrium in capital markets, fixed-income securities, security analysis, options, futures, and other derivatives, and applied portfolio management. Accompanying class lectures, students are required to conduct oral presentations. Upon completion of this course, students will gain not only practical knowledge concerning the investment market and investment products, but also in-depth analysis of portfolio allocation and asset valuations.

Instruction Materials:
- Academic research papers – details will be given in class

Grading Policy:
Students are evaluated in areas of:
- class participation (include oral presentations/homework/assignments)(30%),
- midterm exam (35%),
- final exam (35%).

Oral Presentation Guidelines:
- choose any five securities listed on any stock exchanges around the world or at domestic market
- securities could be cross industry or intra-industry
- use NCKU library database to show stock price movements at different frequencies
- show detailed calculations of EPS (earnings-per-share), P/E ratio (price-earning ratio), and financial ratios for 3 years
- provide your own consultation summary and report to recommend buy, sell, or hold transactions
- any additional calculations of financial data for investment decision is welcome
- provide oral presentation with power point slides for 30 minutes
- refer to 5 academic journal articles for reference
- write up a summary report between 10 to 15 pages
- no late submission of above document is accepted; due date on 2013/6/18.
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