

課程名稱 (course name)	論投資 Topics on Investment				
開課系所班級 (dept. & year)	通識教育中心	學分 (credits)	2	規劃教師 (teacher)	財金系 林盈課
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>本課程探討投資管理議題，以個案研究為講課主軸，介紹投資觀念、理論、實務；分析投資風險、陷阱、限制；討論歷史的趣聞軼事與實務工作者的投資哲學，藉由課程指定參考資料與講師撰寫之個案，總結課堂個案討論帶來的投資啟發與生活智慧。</p> <p>This course is an introduction to important and practical topics on investment by using assigned reading materials and case studies written by the instructors. This course mixes description and theory regarding investment, risk, return, and its limitation. The descriptive materials discuss available investment instruments and consider the purpose and operation of capital markets. The theoretical portion details how students should evaluate current investments and future opportunities to develop investment strategies that satisfy their risk-return objectives. The case study presents the anecdote in investment histories and the philosophy of investment masters and provides students with knowledge in investing and wisdom in life.</p>				
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%
學生在上課之時，學會理財投資的方法，能夠具備基本的、重要的、實用的觀念與知識，了解投資的風險與限制，避開投資陷阱與心理偏誤，為將來理財投資、經濟獨立做好事先準備。	This course introduces important topics on risk, return, constrain, and investor's psychology about investment. Upon successful completion of this course, students would learn about fundamental and practical knowledge available today and develop a way of analyzing and thinking about investments that will remain with them in the years ahead when new and different investment opportunities become available.			人文素養	10%
				科學素養	10%
				溝通能力	20%
				創新能力	30%
				國際視野	20%
				社會關懷	10%
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)
講授、討論、演算、報告	出席率/課堂討論 20% 個案討論心得作業 40% 期末報告 40%
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)	
<ol style="list-style-type: none"> 1. 時間價值/複利威力 2. 風險分析 3. 通貨膨脹/實質購買力 4. 選擇權特質 5. 反脆弱策略 6. 資產評價模式 7. 另類投資/無形資產 8. 商業模式創新 9. 股東權益報酬率 10. 代理人問題 11. 決策心理偏誤 12. 巴斯卡賭注/遊戲理論 13. 贏家詛咒/資訊不對稱 14. 金融龐氏騙局/撈灰金 15. 倖存者光環 16. 投資心理學 17. 雙峰資產組合 18. 大師投資哲學 	
教科書與參考書目 (書名、作者、書局、代理商、說明) (textbook & other references)	
<ol style="list-style-type: none"> 1. Akerlof, George and Robert Shiller, 2009. <i>Animal Spirits: How human psychology drives the economics and why it matters for global capitalism</i>, Princeton University Press. (中文版：動物本能，天下文化) 2. Anderson, Chris, 2006, <i>The Long Tail: Why the Future of Business Is Selling Less of More</i>. (中文版：長尾理論，天下文化) 3. **Buffett, Warren and Lawrence Cunningham, 2017. <i>The Essays of Warren Buffett: Lessons for Corporate America</i>, 4th. (中文版：巴菲特寫給股東的信，時報出版) 4. Dalio, Ray, 2017. <i>Principles: Life and Work</i>, Simon & Schuster, the USA. (中文版：原則，商周出版) 5. Dalio, Ray, 2019. <i>Big Debt Crises</i>, Simon & Schuster, the USA. (中文版：大債危機，商周出版) 6. Kahneman, Daniel, 2011. <i>Thinking Fast and Slow</i>, Penguin Group. (中文版：快思慢想，天下文化) 7. Levitt, Steven and Stephen Dubner, 2007, <i>Freakonomics</i>, Harper Collins Company, USA. (中文版：蘋果橘子經濟學，大塊文化) 8. Levitt, Steven and Stephen Dubner, 2014. <i>Think like a freak: the authors of Freakonomics offer to retrain your brain</i>. HarperCollins Publishers (中文版：蘋果橘子思考術，大塊文化) 	

9. Lynch, Peter and John Rothchild, 1989, One Up on Wall Street: How to Use What You Already Know to Make Money in the Market, Simon & Schuster Inc. (中文版：彼得林區選股戰略，財信出版)
10. Mandelbrot, Benoit and Richard Hudson, 2004. The Misbehavior of Markets: A Fractal View of Risk, Ruin, and Reward, Basic Books, New York. (中文版：股價、棉花與尼羅河密碼，早安財金文化)
11. **Munger, Charles T., 2008. Poor Charlie's Almanack: The Wit and Wisdom of Charles T. Munger, PCA Publications, (中文版：窮查理的普通常識，商業周刊)
12. Silver, Nate, 2012. The Signal and the Noise: Why so many predictions fail-but some don't, The Penguin Press (中文版：精準預測，三采文化)
13. Stephens-Davidowitz, Seth, 2018. Everybody lies: Big Data and What the Internet Can Tell Us About Who We Really Are. (中文版：數據謊言與真相，商周出版)
14. **Taleb, Nassim Nicholas, 2005. Fooled by Randomness: The hidden role of chance in life and in the markets, Random House. (中文版：隨機騙局，大塊文化)
15. Taleb, Nassim Nicholas, 2007. The Black Swan: The Impact of the Highly Improbable, Random House. (中文版：黑天鵝效應，大塊文化)
16. Taleb, Nassim Nicholas, 2012. Antifragile: Things that gain from disorder, Locus Publishing Company. (中文版：反脆弱，大塊文化)
17. Tetlock, Philip and Dan Gardner, 2015. Superforecasting: The Art and Science of Prediction, Philip Tetlock Consulting, Inc. (中文版：超級預測，日月文化)
18. Thaler, Richard, 2015. Misbehaving: The Making of Behavioral Economics, W.W. Norton & Company. (中文版：不當行為，先覺出版)

**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