

## Tamkang University Academic Year 109, 1st Semester Course Syllabus

Course Title	FIXED INCOME SECURITIES AND FINANCIAL INNOVATION	Instructor	YI-CHEN LIN
Course Class	TLUXM1A TKU-QUT DUAL MASTER DEGREE PROGRAM IN FINANCE (ENGLISH-TAUGHT PROGRAM), 1A	Details	<ul style="list-style-type: none"> <li>◆ Blended Course</li> <li>◆ Selective</li> <li>◆ One Semester</li> <li>◆ 2 Credits</li> </ul>
D e p a r t m e n t a l   A i m   o f   E d u c a t i o n			
<p>I. To cultivate a professional understanding of the theory and skills of finance.</p> <p>II. To be able to solve practical problems by professional knowledge of finance.</p> <p>III. Possess the ability to communicate and express views regarding financial profession.</p> <p>IV. Emphasize corporation and coordination within a team.</p> <p>V. To expand international vision and civic awareness.</p>			
Subject Departmental core competences			
<p>A. Have a strong grasp of the advanced knowledge and skills in professional finance. (ratio:20.00)</p> <p>B. Possess the advanced application ability to financial practices.(ratio:20.00)</p> <p>C. To be capable of communicating and expressing views in terms of advanced finance. (ratio:25.00)</p> <p>D. Illustrate the ability of corporation and coordination within a team.(ratio:20.00)</p> <p>E. Understand international financial issues and corporate responsibility.(ratio:15.00)</p>			
Subject Schoolwide essential virtues			
<p>1. A global perspective. (ratio:20.00)</p> <p>2. Information literacy. (ratio:20.00)</p> <p>3. A vision for the future. (ratio:20.00)</p> <p>4. Moral integrity. (ratio:10.00)</p> <p>5. Independent thinking. (ratio:10.00)</p> <p>6. A cheerful attitude and healthy lifestyle. (ratio:10.00)</p> <p>7. A spirit of teamwork and dedication. (ratio:5.00)</p> <p>8. A sense of aesthetic appreciation. (ratio:5.00)</p>			

Course Introduction	This course covers two fields fixed income securities and financial technology, with a focus on the latter. This course will devote 1/4 of the time to enable students to value bonds and quantify the exposure to interest rate risk. Then the course will spend 3/4 of the time to acquaint students with the latest development in fin tech and require students to propose new applications of fin tech to improve financial inclusion.
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**The correspondences between the course's instructional objectives and the cognitive, affective, and psychomotor objectives.**

Differentiate the various objective methods among the cognitive, affective and psychomotor domains of the course's instructional objectives.

- I. Cognitive : Emphasis upon the study of various kinds of knowledge in the cognition of the course's veracity, conception, procedures, outcomes, etc.
- II.Affective : Emphasis upon the study of various kinds of knowledge in the course's appeal, morals, attitude, conviction, values, etc.
- III.Psychomotor: Emphasis upon the study of the course's physical activity and technical manipulation.

No.	Teaching Objectives	objective methods
1	This course aims to educate students in cutting edge techniques for the selection and management of a portfolio of fixed income securities.	Cognitive

**The correspondences of teaching objectives : core competences, essential virtues, teaching methods, and assessment**

No.	Core Competences	Essential Virtues	Teaching Methods	Assessment
1	ABCDE	12345678	Lecture, Discussion, Publication	Testing, Study Assignments, Discussion(including classroom and online), Report(including oral and written), Activity Participation

**Course Schedule**

**Note for Blended Course : When utilizing weekly digital instruction, please fill in "Online Asynchronous Instruction".**

Week	Date	Course Contents	Note
1	109/09/14 ~ 109/09/20	Course introduction and introduction to fixed income securities	
2	109/09/21 ~ 109/09/27	Bond pricing	

3	109/09/28 ~ 109/10/04	Term structure of interest rates and duration analysis	
4	109/10/05 ~ 109/10/11	Term structure of interest rates	
5	109/10/12 ~ 109/10/18	The evolution and impacts of fin tech	
6	109/10/19 ~ 109/10/25	Cloud computing	
7	109/10/26 ~ 109/11/01	Big data analysis and new market platform	
8	109/11/02 ~ 109/11/08	Artificial intelligence	Online Asynchronous Instruction
9	109/11/09 ~ 109/11/15	Blockchain	
10	109/11/16 ~ 109/11/22	Midterm exam	
11	109/11/23 ~ 109/11/29	Payment system	
12	109/11/30 ~ 109/12/06	Payment Method	
13	109/12/07 ~ 109/12/13	Insurance technology	Online Asynchronous Instruction
14	109/12/14 ~ 109/12/20	Peer to peer lending	Online Asynchronous Instruction
15	109/12/21 ~ 109/12/27	Crowdfunding	Online Asynchronous Instruction
16	109/12/28 ~ 110/01/03	Robo-advisors	
17	110/01/04 ~ 110/01/10	Internet-only bank and open banking	
18	110/01/11 ~ 110/01/17	Final exam	
Requirement		There will be 7 oral presentations and short write-ups and 2 take-home exams. One of the write-up should be on what they learn from FINTECH TAIPEI 2020, October 27-28, 2020. Students are required to propose a new business model that involves the fintechs discussed in class so as to promote financial inclusion and the efficiency of the financing and investing process.	
Teaching Facility		Computer	
Textbooks and Teaching Materials		FIN TECH (2019) by TABF. Bond markets, analysis, and strategies Fabozzi, Frank J. 2016	
Number of Assignment(s)		7 (Filled in by assignment instructor only)	
Grading Policy		◆ Attendance : 10.0 %    ◆ Mark of Usual :       %    ◆ Midterm Exam : 10.0 % ◆ Final Exam : 10.0 % ◆ Other 〈Reports〉 : 70.0 %	

Note	<ol style="list-style-type: none"> <li>1. This syllabus may be uploaded at the website of the Course Syllabus Management System at <a href="https://info.ais.tku.edu.tw/csp">https://info.ais.tku.edu.tw/csp</a> or through the link of the Course Syllabus Upload posted on the home page of the TKU Office of Academic Affairs <a href="http://www.acad.tku.edu.tw/CS/main.php">http://www.acad.tku.edu.tw/CS/main.php</a></li> <li>2. According to the Implementation regulations of distance education for junior college and above are prescribed pursuant to Article 2, "The distance learning course referred to in these Measures refers to more than one-half of the teaching hours in each subject."</li> <li>3. According to the regulations of Tamkang University Enforcement Rules for digital teaching, Paragraph 2 and Article 3, the distance learning course of our school must be "The course of digital teaching with distance learning platform or synchronous video system in our school. Teaching Hours include course lectures, teacher-student interaction discussions, quizzes and other learning activities."</li> <li>4. If there are any temporary course changes (including time changes and classroom changes of distance learning courses, blended courses), please make out an application according to regulations to the Office of Academic Affairs.</li> </ol> <p><b>※ Unauthorized photocopying is illegal. Using original textbooks is advised. It is a crime to improperly photocopy others' publications.</b></p>
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