

Tamkang University Academic Year 113, 2nd Semester Course Syllabus

Course Title	FINANCIAL DATA ANALYSIS	Instructor	MANGAL, TRICIA KAREN VERNESSA
Course Class	TLBBM1A MASTER'S PROGRAM, DEPARTMENT OF BANKING AND FINANCE (ENGLISH-TAUGHT PROGRAM), 1A	Details	<ul style="list-style-type: none"> ◆ General Course ◆ Selective ◆ One Semester ◆ 3 Credits
Relevance to SDGs	SDG4 Quality education SDG8 Decent work and economic growth		
Departmental Aim of Education			
In full and advanced financial courses to cultivate the international professional financial talents with independent analysis, judgement, and problem solve abilities.			
Subject Departmental core competences			
<ul style="list-style-type: none"> A. Cultivate advanced knowledge of financial theory.(ratio:15.00) B. Increase the skill of applied theory and practice.(ratio:25.00) C. Increase the ability of logical deduction.(ratio:30.00) D. Learning and use of financial research method.(ratio:10.00) E. Increase the ability to pass the exam of advanced financial professional certificate. (ratio:5.00) F. To have the potential of future advanced academic study.(ratio:15.00) 			
Subject Schoolwide essential virtues			
<ul style="list-style-type: none"> 1. A global perspective. (ratio:10.00) 2. Information literacy. (ratio:30.00) 3. A vision for the future. (ratio:10.00) 4. Moral integrity. (ratio:5.00) 5. Independent thinking. (ratio:25.00) 6. A cheerful attitude and healthy lifestyle. (ratio:5.00) 7. A spirit of teamwork and dedication. (ratio:10.00) 8. A sense of aesthetic appreciation. (ratio:5.00) 			

Course Introduction	This course introduces you to many lessons concerning statistical tools available in Microsoft Excel. You will learn how to perform financial analysis & financial modeling using MS Excel. Case studies and other resources will be used in order to show you how these lessons can be applied in the real world. Moreover, plenty of opportunities to practice will be provided.
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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	Introduce the Built-In Excel Functions, including statistical, financial and logical functions.	Cognitive
2	Create a model with multiple scenarios	Cognitive

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

No.	Core Competences	Essential Virtues	Teaching Methods	Assessment
1	ABCDEF	12345678	Lecture, Discussion	Testing, Study Assignments, Report(including oral and written)
2	ABCDEF	12345678	Lecture, Discussion	Testing, Study Assignments, Report(including oral and written)

Course Schedule

Week	Date	Course Contents	Note
1	114/02/17 ~ 114/02/23	Course Introduction	
2	114/02/24 ~ 114/03/02	Introduction to Excel including formulas and functions	

3	114/03/03 ~ 114/03/09	Excel functions	
4	114/03/10 ~ 114/03/16	Financial Charts and Dashboards	
5	114/03/17 ~ 114/03/23	Pivot Tables & Pivot Charts	
6	114/03/24 ~ 114/03/30	Financial Ratios Analysis	
7	114/03/31 ~ 114/04/06	Spring Break	
8	114/04/07 ~ 114/04/13	Midterm Review and Question Distribution	
9	114/04/14 ~ 114/04/20	Midterm Presentations and Additional Practice	
10	114/04/21 ~ 114/04/27	P&L Analysis	
11	114/04/28 ~ 114/05/04	Loan Repayment Calculations	
12	114/05/05 ~ 114/05/11	Modern Portfolio Concepts	(Portfolio Return and Standard Deviation, Correlation and Diversification)
13	114/05/12 ~ 114/05/18	Time Value of Money	
14	114/05/19 ~ 114/05/25	Capital Budgeting I	
15	114/05/26 ~ 114/06/01	Capital Budgeting II	
16	114/06/02 ~ 114/06/08	Capital Budgeting III and Final Presentation Question Distribution	
17	114/06/09 ~ 114/06/15	Final Presentations	
18	114/06/16 ~ 114/06/22	Final Assignment (Done and submitted online)	
Key capabilities		self-directed learning Problem solving	
Interdisciplinary		Competency-based education 'competency exploration' sustained competency or global issues STEEP (Society, Technology, Economy, Environment, and Politics)	
Distinctive teaching		USR curriculum	

Course Content	Logical Thinking
Requirement	An understanding of basic accounting.
Textbooks and Teaching Materials	Self-made teaching materials:Presentations
References	
Grading Policy	<p>◆ Attendance : 15.0 % ◆ Mark of Usual : 20.0 % ◆ Midterm Exam : 30.0 %</p> <p>◆ Final Exam : 35.0 %</p> <p>◆ Other () : %</p>
Note	<p>This syllabus may be uploaded at the website of Course Syllabus Management System at http://info.ais.tku.edu.tw/csp or through the link of Course Syllabus Upload posted on the home page of TKU Office of Academic Affairs at http://www.acad.tku.edu.tw/CS/main.php.</p> <p>※ Unauthorized photocopying is illegal. Using original textbooks is advised. It is a crime to improperly photocopy others' publications.</p>