

Tamkang University Academic Year 114, 2nd Semester Course Syllabus

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| 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 | ◆ General Course ◆ Selective ◆ One Semester ◆ 3 Credits |
| Relevance to SDGs | SDG4 Quality education SDG8 Decent work and economic growth | | |
| 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 | | | |
| 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 | | | |
| 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 | | | |
| 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) | | | |

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| Course Introduction | <p>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.</p> |
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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 and analyze a multi-scenario model to evaluate investment decisions | 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 | 115/02/23 ~ 115/03/01 | Course Introduction | |
| 2 | 115/03/02 ~ 115/03/08 | Introduction to Excel including formulas and functions | |

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| 3 | 115/03/09 ~ 115/03/15 | Excel functions | |
| 4 | 115/03/16 ~ 115/03/22 | Financial Charts and Dashboards | |
| 5 | 115/03/23 ~ 115/03/29 | Pivot Tables & Pivot Charts | |
| 6 | 115/03/30 ~ 115/04/05 | Spring Break | |
| 7 | 115/04/06 ~ 115/04/12 | Financial Ratios Analysis | |
| 8 | 115/04/13 ~ 115/04/19 | Midterm Review and Question Distribution | |
| 9 | 115/04/20 ~ 115/04/26 | Midterm Presentations and Additional Practice | |
| 10 | 115/04/27 ~ 115/05/03 | P&L Analysis | |
| 11 | 115/05/04 ~ 115/05/10 | Loan Repayment Calculations | |
| 12 | 115/05/11 ~ 115/05/17 | Modern Portfolio Concepts | |
| 13 | 115/05/18 ~ 115/05/24 | Time Value of Money | |
| 14 | 115/05/25 ~ 115/05/31 | Capital Budgeting | |
| 15 | 115/06/01 ~ 115/06/07 | Final Review and Questions Distribution | |
| 16 | 115/06/08 ~ 115/06/14 | Final Presentations | |
| 17 | 115/06/15 ~ 115/06/21 | Iclass Assignment I | |
| 18 | 115/06/22 ~ 115/06/28 | Iclass Assignment II | |
| 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 | |
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| 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 https://web2.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>※"Adhere to the concept of intellectual property rights" and "Do not illegally photocopy, download, or distribute." Using original textbooks is advised. It is a crime to improperly photocopy others' publications.</p> |