

Investment Management

投資管理

Postgraduate Certificate in Banking and Corporate Treasury Management

Programme Code: FN043A

Application Code: 2445-FN043A



2867 8392

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The target student groups for this programme are financial services practitioners who need to understand treasury from the customer's perspective and would like to pursue in-depth knowledge of banking and corporate treasury function in global financial markets. Practitioners such as front office dealers, specialists in treasury banking operations, corporate treasury specialists, treasury risk analysts, treasury management product analysts, treasury and pension officers, corporate treasury back office specialists, internal auditors in treasury operations, or consultants are suitable to attend the programme.

TMA will offer the TMA Level 2 (Full Member) membership to graduates who have successfully completed this programme.

- R** Applicants shall hold a bachelor's degree awarded by a recognized institution. If the degree is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency such as:
- an overall band of 6.0 with no subtests lower than 5.5 in the IELTS;
 - a score of 550 in the paper-based TOEFL, or a score of 213 in the computer-based TOEFL, or a score of 80 in the internet-based TOEFL;
 - HKALE Use of English at Grade E;
 - HKDSE Examination English Language at Level 3 or above; or
 - equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

- E** Students may apply for exemptions of up to one module of the programme. Exemptions may be granted for individual module if the student has successfully completed a module of comparable content and standard. Application for exemptions will be deliberated and decided by the Programme Team.

\$ \$7,000 per module
Application Fee: HK\$150

D 12 months

English

Q Level 6 (Reg. No.: 17/000492/L6) Validity Period: 19 May 2017 - on-going

Postgraduate Diploma in Investment Management and Financial Intelligence

Programme Code: FN044A

Application Code: 2445-FN044A



2867 8476

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The programme aims to:

- impart financial and investment management knowledge and skills to students to enhance their financial decision making;
- facilitate students to understand and analyze contemporary issues as well as the latest development in the financial world;
- prepare students to sit for the CFA examinations based on the Candidate Body of Knowledge;
- equip students with the latest technologies on Big Data and Artificial Intelligence for financial industry;
- stimulate students to apply financial intelligence to perform investment management.

- R** Applicants shall hold a bachelor's degree awarded by a recognized institution. If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:
- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
 - a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
 - HKALE Use of English at Grade E or above; or
 - HKDSE Examination English Language at Level 3 or above; or
 - equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

Remark: Applicants with relevant academic and/or professional qualifications may approach the Programme Team for application of exemption.

\$ HK\$8,500 per module
Application Fee: HK\$150

D 1 year to 2 years

English

Q Level 6 (Reg. No.: 17/001054/L6) Validity Period: 01 Jan 2018 - on-going

Advanced Diploma in Financial Planning

Programme Code: FN005A

Application Code: 2440-FN005A



2867 8468

cfp@hkuspace.hku.hk

For details, please refer to p.072

投資管理證書

課程編號: FN030A

報名代碼: 2435-FN030A



2867 8322

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近年金融市場瞬息萬變，環球經濟充斥很多不穩定因素，投資者要於日趨複雜的投資市場獲利，便須進一步了解各種投資產品，運用各種交易策略以增加投資回報及避險。本課程包含股票、外匯、衍生產品及對沖基金的投資理論，引用實例講解複雜的交易策略，讓學員掌握不同市況的投資策略。

- R** 申請人必須：
- a) 於香港中學會考獲5科E級，包括於中國語文科(2007年或以前)；或
 - b) 於香港中學會考獲4科E級及中國語文科第2級(2007年或以後)；或
 - 於香港中學文憑考試獲5科第2級，包括中國語文科。
- 申請人如持有其他同等學歷及21歲以上或擁有3年相關工作經驗者將會作個別考慮。

\$ 單元一：股票投資策略 HK\$4,800
單元二：金融技術及趨勢分析 HK\$4,800
單元三：外匯、衍生工具、結構性產品及對沖基金交易策略 HK\$6,200
報名費用：HK\$150

D 9個月

粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：15/002752/L3
資歷名冊登記有效期：2015年7月24日 - 持續有效

證書(單元：股票投資策略)

課程編號: FN032A

報名代碼: 2455-FN032A



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近年金融市場瞬息萬變，環球經濟充斥著很多不穩定因素，投資者要於日趨複雜的投資市場獲利，便須進一步了解各種投資產品，並運用不同的交易策略以增加投資回報及避險。

- R** 申請人必須：
- a) 於香港中學會考獲5科E級，包括於中國語文科(2007年或以前)；或
 - b) 於香港中學會考獲4科E級及中國語文科第2級(2007年或以後)；或
 - 於香港中學文憑考試獲5科第2級，包括中國語文科。
- 申請人如持有其他同等學歷及21歲以上或擁有3年相關工作經驗者將會作個別考慮。

\$ HK\$4,800

D 3個月

粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：15/002754/L3
資歷名冊登記有效期：2015年7月24日 - 持續有效

See legend on page 033 圖說說明於第033頁

- R** Minimum Entry Requirements 基本入學要求 (P.017) **\$** Fee 學費 **D** Duration 修業期
E Medium of Instruction 教學語言 **Q** Qualifications Framework 資歷架構 **E** Exemption 豁免 **S** Short Course 短期課程

For more and latest programme information, please visit our website
有關最新課程資訊及詳情，請瀏覽學院網站 hkuspace.hku.hk

證書 (單元：金融技術及趨勢分析)

課程編號：FN033A

報名代碼：2435-FN033A



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近年金融市場瞬息萬變，環球經濟充斥著很多不穩定因素，投資者要於日趨複雜的投資市場獲利，便須進一步了解各種投資產品，並運用不同的交易策略以增加投資回報及避險。

- R** 申請人必須：
- a) 於香港中學會考獲5科E級，包括於中國語文科(2007年或以前)；或
 - b) 於香港中學會考獲4科E級及中國語文科第2級(2007年或以後)；或
 - 於香港中學文憑考試獲5科第2級，包括中國語文科。
- 申請人如持有其他同等學歷及21歲以上或擁有3年相關工作經驗者將會作個別考慮。

\$ HK\$4,800

D 3個月

🇬🇧 粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：15/002755/L3
資歷名冊登記有效期：2015年7月24日 - 持續有效

證書 (單元：外匯、衍生工具、結構性產品及對沖基金交易策略)

課程編號：FN034A

報名代碼：2445-FN034A



☎ 2867 8322

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近年金融市場瞬息萬變，環球經濟充斥著很多不穩定因素，投資者要於日趨複雜的投資市場獲利，便須進一步了解各種投資產品，運用各種交易策略以增加投資回報及避險。本課程包含股票、外匯、衍生產品及對沖基金的投資理論，引用實例講解複雜的交易策略，讓學員掌握不同市況的投資策略。

- R** 申請人必須：
- a) 於香港中學會考獲5科E級，包括於中國語文科(2007年或以前)；或
 - b) 於香港中學會考獲4科E級及中國語文科第2級(2007年或以後)；或
 - 於香港中學文憑考試獲5科第2級，包括中國語文科。
- 申請人如持有其他同等學歷及21歲以上或擁有3年相關工作經驗者將會作個別考慮。

\$ HK\$6,200

D 3個月

🇬🇧 粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：15/002753/L3
資歷名冊登記有效期：2015年7月24日 - 持續有效

證書 (單元：美股投資策略)

課程編號：FN070A

報名代碼：2435-FN070A



☎ 2867 8322

✉ cgim@hkuspace.hku.hk

本課程介紹美國股票市場的運作和教授美股基礎和趨勢分析，並透過不同的美股實例幫助學員建構美股投資組合及風險管理。

- R** 申請人必須
- (i) 於香港中學文憑考試獲5科第2級包括中國語文科；或
 - (ii) a) 於香港中學會考獲5科E級包括中國語文科(2007年或以前)；或
 - b) 於香港中學會考獲4科E級及中國語文科第2級(2007年或以後)。
- 申請人如持有其他同等學歷及21歲以上或擁有3年相關工作經驗者將會作個別考慮。

\$ HK\$7,100

D 3個月

🇬🇧 粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：21/001426/L3
資歷名冊登記有效期：2021年12月13日 - 持續有效

證書 (單元：加密貨幣投資解碼)

課程編號：FN072A

報名代碼：2450-FN072A



☎ 2867 8322

✉ cgim@hkuspace.hku.hk

此課程介紹區塊鏈技術、區塊鏈的運作和應用與現今加密貨幣市場的運作，並透過不同的加密貨幣實例分析，幫助學員了解加密貨幣生態圈及其風險管理。

- R** 申請人必須
- (i) 於香港中學文憑考試獲5科第2級包括中國語文科；或
 - (ii) a) 於香港中學會考獲5科E級包括中國語文科(2007年或以前)；或
 - b) 於香港中學會考獲4科E級及中國語文科第2級(2007年或以後)。
- 申請人如持有其他同等學歷及21歲以上或擁有3年相關工作經驗者將會作個別考慮。

\$ HK\$5,600

D 3個月

🇬🇧 粵語輔以英語

Q 資歷架構級別：3 資歷名冊登記號碼：21/001424/L3
資歷名冊登記有效期：2021年12月13日 - 持續有效

Certificate for Module (CFA Level I Examination Preparatory Programme)

Programme Code: FN089A

Application Code: 2390-FN089A



☎ 2867 8468

✉ cfa@hkuspace.hku.hk

The programme aims to prepare students to sit for the Chartered Financial Analyst (CFA) Level I examination. It will provide students with knowledge of quantitative methods, economic and financial analysis, and portfolio management. It also covers the ethical and professional standards requirement for an asset manager.

- R** Applicants should hold a degree awarded by a recognised institution. Applicants should check with the CFA Institute that they are eligible to attempt the examination.

\$ HK\$14,000

D 2 months to 3 months

🇬🇧 English

Q Level 6 (Reg. No.: 22/001002/L6) Validity Period: 01 Dec 2022 - on-going

Certificate for Module (CFA Level II Examination Preparatory Programme)

Programme Code: FN090A

Application Code: 2440-FN090A



☎ 2867 8468

✉ cfa@hkuspace.hku.hk

The programme aims to prepare students to sit for the Chartered Financial Analyst (CFA) Level II examination. It will provide students with the knowledge in economic and corporate financial analysis, the valuation techniques of investment assets and issues of portfolio management.

- R** Applicants should hold a degree awarded by a recognised institution. Applicants should check with the CFA Institute that they are eligible to attempt the examination.

\$ HK\$16,500

D 2 months to 3 months

🇬🇧 English

Q Level 6 (Reg. No.: 22/001003/L6) Validity Period: 01 Dec 2022 - on-going

Investment Management

投資管理

Certificate for Module (CFA Level III Examination Preparatory Programme) Programme Code: FN091A

Application Code: 2450-FN091A

2867 8468

cfa@hkuspace.hku.hk



The programme aims to prepare students to sit for the Chartered Financial Analyst (CFA) Level III examination. It will provide students with the advanced knowledge to evaluate various asset classes in investment portfolios and perform asset allocation in synthesized cases. It also enables students to perform wealth planning and portfolio management holistically.

- R** Applicants should hold a degree awarded by a recognised institution. Applicants should check with the CFA Institute that they are eligible to attempt the examination.
- \$** HK\$19,200
- D** 2 months to 3 months English
- Q** Level 6 (Reg. No.: 22/001004/L6) Validity Period: 01 Dec 2022 - on-going

證書 (單元：全方位基礎金融交易策略)

課程編號：FN118A

報名代碼：2445-FN118A

2867 8322

cmbfts@hkuspace.hku.hk



本課程旨在教授學員有關金融交易的基礎知識，內容涵蓋投資心理學、交易原則、基本分析、交易系統、期權策略、商品衍生工具買賣、基金實戰守則及加密貨幣投資操作技巧。完成本課程後，學員能理解金融交易的基本概念及其應用。

- R** 申請人必須：
 - (i) 於香港中學文憑考試獲5科第2級，包括中國語文科；或
 - (ii) 於香港中學會考獲5科E級，包括中國語文科。申請人如持有其他同等學歷將會個別考慮。
- \$** HK\$6,300
- D** 30小時 粵語輔以英語
- Q** 資歷架構級別：3 資歷名冊登記號碼：25/000005/L3
資歷名冊登記有效期：2025年4月1日 - 持續有效

Certificate for Module (Examinations Preparatory Programme for Financial Risk Manager (FRM) Part I) Programme Code: FN053A

Application Code: 2380-FN053A

2975 5767 / 2867 8476

frmexam@hkuspace.hku.hk



The programme aims to prepare students for taking the Financial Risk Manager Part I examination and provide them with a sound theoretical grounding in financial risk management. The programme covers various risk measure techniques to perform financial analysis and investment management. It imparts financial and investment knowledge and skills to students to enhance their financial decision making.

- R** Applicants shall hold a bachelor's degree awarded by a recognised institution. If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:
 - i. an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
 - ii. a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
 - iii. HKALE Use of English at Grade E or above; or
 - iv. HKDSE Examination English Language at Level 3 or above; or
 - v. equivalent qualifications.Applicants with other qualifications will be considered on individual merit. Students are highly encouraged to check with the Global Association of Risk Professionals (GARP) for their eligibility of taking the FRM Part I Examination.
- \$** HK\$8,400
Application Fee: HK\$150
- D** 39 hours English
- Q** Level 6 (Reg. No.: 20/000614/L6) Validity Period: 15 Oct 2020 - on-going

Certificate for Module (Examinations Preparatory Programme for Financial Risk Manager (FRM) Part II) Programme Code: FN054A

Application Code: 2380-FN054A

2975 5767 / 2867 8476

frmexam@hkuspace.hku.hk



The programme aims to prepare students for taking the Financial Risk Manager Part II examination and provide them with a broad range of risk management concepts and techniques. The programme covers the management and techniques of various financial risks to enhance their financial decision making. It stimulates students to apply valuation techniques to perform financial risk management.

- R** Applicants shall hold a bachelor's degree awarded by a recognised institution. If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:
 - i. an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
 - ii. a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above in the internet-based TOEFL; or
 - iii. HKALE Use of English at Grade E or above; or
 - iv. HKDSE Examination English Language at Level 3 or above; or
 - v. equivalent qualifications.Applicants with other qualifications will be considered on individual merit. Students are highly encouraged to check with the Global Association of Risk Professionals (GARP) for their eligibility of taking the FRM Part II Examination.
- \$** HK\$9,900
Application Fee: HK\$150
- D** 42 hours English
- Q** Level 6 (Reg. No.: 20/000615/L6) Validity Period: 15 Oct 2020 - on-going

證書 (單元：現實世界資產代幣化、穩定幣與數碼資產入門)

課程編號：FN167A

報名代碼：2390-FN167A

2867 8322

lucas.ng@hkuspace.hku.hk



本課程旨在讓學員掌握數碼資產及區塊鏈技術的基礎知識，涵蓋加密貨幣、現實世界資產 (RWA) 代幣化、穩定幣及數碼資產在金融與商業中的應用。課程亦探討相關技術架構、安全性、監管趨勢及未來發展，並透過案例分享提升學員在數碼資產領域的基本理解與應用能力。

- R** 申請人必須：
 - (i) 完成香港高中課程；或
 - (ii) 完成香港中學會考課程。申請人若年滿二十一歲並具備基本中英文閱讀及書寫能力，其申請將按個情況考慮。
- \$** HK\$9,000
- D** 30小時 粵語
- Q** 資歷架構級別：3 資歷名冊登記號碼：26/000043/L3
資歷名冊登記有效期：2026年6月1日 - 持續有效

Certificate for Module (Islamic Finance) Programme Code: FN110A

Application Code: 2450-FN110A

2867 8322 / 2867 8303

cmif@hkuspace.hku.hk



The programme aims to introduce students to the principles and practices of Islamic finance. It covers an overview of the Islamic financial system, Islamic law, regulations and the role of ethics in Islamic finance. Features of different Islamic financial products will be examined.

- R** Applicants should hold an Advanced Diploma, a Higher Diploma or an Associate Degree awarded by a recognised institution. Applicants with other equivalent qualifications will be considered on individual merit.
- \$** HK\$6,900
- D** 3 months English
- Q** Level 5 (Reg. No.: 24/000782/L5) Validity Period: 01 Oct 2024 - on-going

See legend on page 033 圖像說明於第033頁

- R** Minimum Entry Requirements 基本入學要求 (P.017)
- \$** Fee 學費
- D** Duration 修業期
- E** Medium of Instruction 教學語言
- Q** Qualifications Framework 資歷架構
- E** Exemption 豁免
- S** Short Course 短期課程

For more and latest programme information, please visit our website
有關最新課程資訊及詳情，請瀏覽學院網站 hkuspace.hku.hk

Certificate for Module (Momentum Investing)

Programme Code: FN162A

Application Code: 2440-FN162A



2867 8322

lucas.ng@hkuspace.hku.hk

This programme aims to equip students with the latest knowledge, tools and techniques in momentum investing. Students will learn how to design, backtest and optimise momentum-based trading strategies. It covers key aspects of momentum signals, basic momentum-based trading techniques and risk management of momentum investing. The programme also features real-world case studies and live demonstrations to illustrate the building of various momentum-based trading programmes.

R Applicants shall hold an Advanced Diploma, a Higher Diploma or an Associate Degree awarded by a recognised institution where the language of teaching and assessment is English.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$9,000

D 30 hours

English

Q Level 5 (Reg. No.: 25/001366/L5) Validity Period: 01 Apr 2026 - on-going

Certificate for Module (Prompt Engineering for Finance and Business)

Programme Code: FN128A

Application Code: 2440-FN128A



2867 8322

cmpefb@hkuspace.hku.hk

This programme aims to equip students with the fundamentals of prompt engineering, enabling them to create tailored prompts for AI tools that automate enterprise operation, enhance data analysis, and provide actionable insights in a business and finance context. It covers the basics of generative AI, techniques for prompt engineering, no-code AI platform applications, use cases of prompt engineering and challenges of prompt engineering. Case studies on strategic decision making through prompt engineering in finance and business will be examined.

R Applicants shall hold a bachelor's degree awarded by a recognised institution. If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above on the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$9,000

D 30 hours

English

Q Level 5 (Reg. No.: 25/000465/L5) Validity Period: 01 Apr 2025 - on-going

Certificate for Module (Tokenisation and Digital Asset Trading)

Programme Code: FN124A

Application Code: 2440-FN124A



2867 8322

tdat@hkuspace.hku.hk

This programme aims to equip students with the latest knowledge in tokenisation of real world assets and different digital assets. It covers concepts of tokenisation, token-based blockchain platform, smart contracts, token issuance, different digital asset trading strategies, regulatory landscape of digital assets and challenges of tokenisation. Case studies of various tokenisation and digital assets in Hong Kong will be examined.

R Applicants shall hold a bachelor's degree awarded by a recognised institution. If the degree or equivalent qualification is from an institution where the language of teaching and assessment is not English, applicants shall provide evidence of English proficiency, such as:

- an overall band of 6.0 or above with no subtests lower than 5.5 in the IELTS; or
- a score of 550 or above in the paper-based TOEFL, or a score of 213 or above in the computer-based TOEFL, or a score of 80 or above on the internet-based TOEFL; or
- HKALE Use of English at Grade E or above; or
- HKDSE Examination English Language at Level 3 or above; or
- equivalent qualifications.

Applicants with other qualifications will be considered on individual merit.

\$ HK\$9,300

D 30 hours

English

Q Level 5 (Reg. No.: 25/000365/L5) Validity Period: 01 May 2025 - on-going

財富增值系列

為了回應學員們的學習需要及對投資知識的濃厚興趣，香港大學專業進修學院推出一系列有關財富增值的短期課程，包括債券投資心法、指數指標投資攻略、大時代下之股票投資及技術分析、衍生工具投資解碼、穩健投資組合、逆境投資攻略、ETF投資攻略、ESG投資法、選股價值投資法、另類投資策略、綠色金融與社會責任投資及新國際經濟秩序下的環球投資。

證書 (單元：財富增值系列：另類投資策略)

課程編號：FN068A

報名代碼：2390-FN068A



2520 4612

finsc@hkuspace.hku.hk

課程旨在教授學員認識另類投資，比較另類投資產品與傳統投資產品的分別，了解另類投資產品如名錶、葡萄酒及烈酒、非同質化代幣 (NFT)、環球房地產、可交易配額、與另類投資相關的上市交易所買賣基金 (ETF) 等，從而將另類投資產品加入投資組合。此外，本課程亦會指導學員就有關另類投資產品進行投資分析，選擇適合自己的平衡投資策略。

R 申請人應該完成香港中學會考課程或香港高中課程。
申請人如持有其他同等資格，學院將按個別情況考慮。

\$ HK\$5,500

D 30小時

粵語

Q 資歷架構級別：3 資歷名冊登記號碼：21/001167/L3
資歷名冊登記有效期：2021年11月1日 - 持續有效

證書 (單元：財富增值系列：ETF 投資攻略)

課程編號：FN051A

報名代碼：2445-FN051A



2520 4612

finsc@hkuspace.hku.hk

課程旨在介紹上市交易所買賣基金 (ETF) 的投資特性，辨別所持資產類別 (例如指數、股票、債券等)，讓學員認識ETF作為環球投資的方法及分散風險的概念。完成課程後，學員能夠了解ETF投資策略，選擇適合自己的ETF產品作為投資部署，專業講者亦會分享其ETF交易實戰投資心得。

R 申請人應該完成香港中學會考課程或香港高中課程。
申請人如持有其他同等資格，學院將按個別情況考慮。

\$ HK\$6,600

D 5個星期

粵語

Q 資歷架構級別：3 資歷名冊登記號碼：20/000583/L3
資歷名冊登記有效期：2020年9月1日 - 持續有效

Investment Management

投資管理

證書 (單元：財富增值系列： 新國際經濟秩序下的環球投資)

課程編號：FN066A

報名代碼：2445-FN066A

2520 4612

finsc@hkuspace.hku.hk



課程旨在教授學員認識不同經濟大國和聯盟的政策及經濟發展，了解新國際經濟秩序下對不同國家及地區的金融市場所產生的影響，從而研究有關環球投資的課題。此外，本課程亦會指導學員就有關環球投資進行經濟及投資分析，選擇適合自己的環球投資策略。

R 申請人應該完成香港中學會考課程或香港高中課程。
申請人如持有其他同等資格，學院將按個別情況考慮。

\$ HK\$6,500

D 30小時

粵語

Q 資歷架構級別：3 資歷名冊登記號碼：21/000553/L3
資歷名冊登記有效期：2021年9月1日 - 持續有效

證書 (單元：財富增值系列：選股及價值投資法)

課程編號：FN052A

報名代碼：2390-FN052A

2520 4612

finsc@hkuspace.hku.hk



課程旨在教授學員如何運用基本分析方法研究上市公司股票的內在價值，應用股票價值評估方法以選擇公司股票。此外，也會指導學員對作為投資目標的上市公司進行分析及作出財務預測，並討論價值投資方法及股票投資策略。

\$ HK\$7,000

D 5個星期

粵語

Q 資歷架構級別：3 資歷名冊登記號碼：20/000584/L3
資歷名冊登記有效期：2020年9月1日 - 持續有效

財富增值系列：穩健投資組合

課程編號：FINA9349

報名代碼：2435-1590NW

2520 4612

finsc@hkuspace.hku.hk

本課程為財富增值系列中的一個短期課程，旨在讓學員認識不同的投資工具，例如股票、債券、外匯、交易所買賣基金(ETF)等，了解個人的投資目標及限制，訂立個人投資計劃，建立及管理好個人投資組合，當上自己的個人基金經理，讓投資組合提供穩定回報。此外，在課程中講者將分享不同的投資策略和有關例子，以助學員設計適合個人的穩健投資組合。

\$ HK\$3,400

D 5個星期

粵語

財富增值系列：債券投資心法

課程編號：FINA9337

報名代碼：2390-1861NW

2520 4612

finsc@hkuspace.hku.hk



本課程為財富增值系列中的一個短期課程，旨在向學員學習固定收入證券投資的概念及術語，認識不同的債券產品，了解固定收入證券投資中潛在的風險及回報，以幫學員實現更好的投資決策。

\$ HK\$3,200

D 5個星期

粵語

財富增值系列：衍生工具投資解碼

課程編號：FINA9339

報名代碼：2390-1513NW

2520 4612

finsc@hkuspace.hku.hk



本課程為15小時短期課程，旨在向學員介紹期權及結構性產品投資的概念及術語，專業講者將會分析當前在貿易戰下的投資環境，讓學員認識期權的運作及不同類型的結構性投資產品，並了解有關衍生工具及投資產品的潛在風險及回報，專業講者亦會分享期權及結構性投資產品的投資心得，以幫學員實現更好的投資決策。

\$ HK\$3,400

D 5個星期

粵語

財富增值系列：逆境投資攻略

課程編號：FINA9350

報名代碼：2435-1638NW

2520 4612

finsc@hkuspace.hku.hk

本課程為15小時短期課程，旨在向學員分析在逆境下環球經濟的形勢及相關的投資機會，了解競爭策略、五力模型及價值鏈分析，分享著名投資大師的投資策略，選擇有升值潛力的板塊及行業以作長遠投資。此外，在課程中講者將分享投資策略和有關例子，以助學員作出宏觀經濟分析及制定環球投資決策。

\$ HK\$3,400

D 5個星期

粵語

財富增值系列：指數指標投資攻略

課程編號：FINA9336

報名代碼：2440-1232NW

2520 4612

finsc@hkuspace.hku.hk



本課程為財富增值系列中的一個短期課程，旨在教授學員認識常見的經濟指數和財經指標，並了解其背後的投資啟示，以幫助投資者制定投資策略。此外，講者將分享技術指標的應用，以協助作出精明的投資決策。

\$ HK\$3,400

D 5個星期

粵語

財富增值系列： 大時代下之股票投資及技術分析

課程編號：FINA9338

報名代碼：2440-1235NW

2520 4612

finsc@hkuspace.hku.hk



本課程為財富增值系列中的一個短期課程，旨在向學員介紹有關挑選持有升值潛力的上市公司及賣出股價有下跌可能的方法，觀察股票市場的投資情緒，並運用技術分析以助制定買賣決策。

\$ HK\$3,400

D 5個星期

粵語

See legend on page 033 圖像說明於第033頁

R Minimum Entry Requirements 基本入學要求 (P.017)

\$ Fee 學費

D Duration 修業期

E Medium of Instruction 教學語言

Q Qualifications Framework 資歷架構

E Exemption 豁免

S Short Course 短期課程

For more and latest programme information, please visit our website
有關最新課程資訊及詳情，請瀏覽學院網站 hkuspace.hku.hk

Executive Diploma in Anti-Money Laundering and Counter-Terrorist Financing

Programme Code: EP087A

Application Code: 2455-EP087A

2867 8312

ecaml@hkuspace.hku.hk

For details, please refer to p.065

股市大數據投資攻略

課程編號：FINA9306

報名代碼：2440-1229NW

2520 4612

finsc@hkuspace.hku.hk

課程介紹各種不同的取數方法來解讀公司狀態，如：盈喜盈警數據，績優績差數據，賣殼或私有化數據等等。香港交易所發布的本地股票市場數據及各種互聯網經濟數據複雜繁多，如何利用各種解讀方式從而判斷投資決策，系統式數據能有效增強投資收益。

HK\$2,900

5 個星期

粵語

CFA Practical Skills Module Workshop Series

CFA Practical Skills Module Workshop Series (Analyst Skills)

Programme Code: FINA9368

Application Code: 2435-2125NW

2867 8468

cfa@hkuspace.hku.hk

This is a 9-hour short course to focus on CFA Practical Skills Module. Students will learn the skills required for success as buy-side and sell-side equity research analysts. Students will also explore how to conduct thorough industry research, research companies strategically, forecast accurately, identify mispricings, and make recommendations based on their work.

HK\$3,650

9 hours

Cant, supp with English (lecture materials in Eng)

CFA Practical Skills Module Workshop Series (Due Diligence)

Programme Code: FINA9385

Application Code: 2390-1689NW

2867 8468

cfa@hkuspace.hku.hk

This is a 12-hour short course to focus on CFA Practical Skills Module. The workshop equips students with practical skills to evaluate and execute private equity deals, covering opportunity screening, valuation, due diligence, and exit strategies. Students will learn to assess financial, legal, and operational risks across the deal lifecycle. Through interactive content, they will gain the tools and confidence to manage private market investments and support informed, value-driven decision-making.

Applicants should hold a degree awarded by a recognised institution.

Applicants should check with the CFA Institute that they are eligible to attempt the examination.

HK\$4,800

12 hours

Cant, supp with English (lecture materials in Eng)

CFA Practical Skills Module Workshop Series (Financial Modeling)

Programme Code: FINA9366

Application Code: 2435-2150NW

2867 8468

cfa@hkuspace.hku.hk

This is a 9-hour short course to focus on CFA Practical Skills Module. Students will learn how to build three-statement financial models as it is done on Wall Street. Students will explore best practices, discover optimal model flow and design, strengthen Excel practical skills and tackle more complex modeling cases in practice.

HK\$3,650

9 hours

Cant, supp with English (lecture materials in Eng)

CFA Practical Skills Module Workshop Series (Managing Private Wealth Clients)

Programme Code: FINA9384

Application Code: 2390-1687NW

2867 8468

cfa@hkuspace.hku.hk

This is a 12-hour short course to focus on CFA Practical Skills Module. This workshop places learners in the role of a wealth advisor, guiding newly liquid clients through investment planning. Learners will practice building cash flow models, managing behavioural biases, optimising asset allocation in Excel, and using data visualisation to support decisions. It also covers running effective client meetings with coaching techniques. Interactive activities reinforce skills for real-world private wealth management.

Applicants should hold a degree awarded by a recognised institution.

Applicants should check with the CFA Institute that they are eligible to attempt the examination.

HK\$4,800

12 hours

Cant, supp with English (lecture materials in Eng)

CFA Practical Skills Module Workshop Series (Portfolio Development and Construction)

Programme Code: FINA9382

Application Code: 2390-1371NW

2867 8468

cfa@hkuspace.hku.hk

This is a 12-hour short course to focus on CFA Practical Skills Module. The workshop equips learners with skills in crafting Investment Policy Statements, understanding behavioural finance, and applying portfolio optimisation techniques. It emphasises asset allocation and performance evaluation as essential for managing long-term portfolios like endowments. Through interactive content, learners gain practical expertise in maintaining resilient, data-driven investment strategies in dynamic financial environments.

Applicants should hold a degree awarded by a recognised institution.

Applicants should check with the CFA Institute that they are eligible to attempt the examination.

HK\$4,800

12 hours

Cant, supp with English (lecture materials in Eng)

NCR1

This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，本課程屬獲豁免課程。It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. 個別僱主可酌情決定是否承認本課程可令學員獲取的任何資格。

NCR2

These are exempted courses under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，這些課程屬獲豁免課程。

NCR3

The course operator is applying for exemption under the Non-local Higher and Professional Education (Regulation) Ordinance. 課程主辦人正根據《非本地高等及專業教育(規管)條例》辦理豁免註冊手續。It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. 個別僱主可酌情決定是否承認本課程可令學員獲取的任何資格。

Investment Management

投資管理

CFA Practical Skills Module Workshop Series (Practical Macro)

S

Programme Code: FINA9383

Application Code: 2390-1564NW

2867 8468

cfa@hkuspace.hku.hk



This is a 12-hour short course to focus on CFA Practical Skills Module. The workshop provides hands-on experience in applying macroeconomic analysis to investment decisions through scenario-based learning. Learners will learn to assess economic conditions, forecast market trends, and make informed recommendations. Moreover, learners will be confident in integrating macro insights into portfolio strategies, enhancing their ability to respond to shifting economic environments with practical, data-driven decisions.

R Applicants should hold a degree awarded by a recognised institution.

Applicants should check with the CFA Institute that they are eligible to attempt the examination.

\$ HK\$4,800

D 12 hours

E Cant, suppl with English (lecture materials in Eng)

CFA Practical Skills Module Workshop Series (Python, Data Science & AI)

S

Programme Code: FINA9369

Application Code: 2435-2152NW

2867 8468

cfa@hkuspace.hku.hk



This is a 9-hour short course to focus on CFA Practical Skills Module. Students will follow the data science workflow from financial data ingestion to training artificial neural networks. Also, students will have the opportunity to pull financial data and use the standard tools and techniques to prepare it to deliver insights, work through an example of forecasting percentage change in EPS, and explore a common natural language processing task of sentiment analysis.

\$ HK\$3,650

D 9 hours

E Cant, suppl with English (lecture materials in Eng)

CFA Practical Skills Module Workshop Series (Python Programming Fundamentals)

S

Programme Code: FINA9367

Application Code: 2435-2158NW

2867 8468

cfa@hkuspace.hku.hk



This is a 9-hour short course to focus on CFA Practical Skills Module. Students will explore the basics of Python and how to use Jupyter Notebooks to develop, present, and share data science projects related to finance. Also, the workshop assists students to quickly build up their coding skills and apply them to dozens of industry-specific examples.

\$ HK\$3,650

D 9 hours

E Cant, suppl with English (lecture materials in Eng)

Chartered Financial Analyst Refresher Course – Level 1

S

Programme Code: FINA9277

Application Code: 2440-2121NW

2867 8468

cfa@hkuspace.hku.hk



This is a 10-hour short course to focus on CFA level 1 exam questions.

R There are no specific entry requirements. However, students should check the requirements of the CFA Institute to ensure that they qualify to sit for the CFA examinations.

\$ HK\$3,800

D 10 hours

E Cantonese, suppl with English

Chartered Financial Analyst Refresher Course – Level 2

S

Programme Code: FINA9278

Application Code: 2440-1242NW

2867 8468

cfa@hkuspace.hku.hk



This is a 10-hour short course to focus on CFA level 2 exam questions. Students are assumed to have the knowledge required for the CFA syllabus and this course will help them go through different type of questions step-by-step and the relevant tricks required to tackle these questions.

R There are no specific entry requirements. However, students should check the requirements of the CFA Institute to ensure that they qualify to sit for the CFA examinations.

\$ HK\$3,800

D 10 hours

E Cantonese, suppl with English

Chartered Financial Analyst Refresher Course – Level 3

S

Programme Code: FINA9324

Application Code: 2440-1541NW

2867 8468

cfa@hkuspace.hku.hk



This is a 10-hour short course to focus on CFA level 3 exam questions. Students are assumed to have the knowledge required for the CFA syllabus and this course will help them go through different type of questions step-by-step and the relevant tricks required to tackle these questions.

R There are no specific entry requirements. However, students should check the requirements of the CFA Institute to ensure that they qualify to sit for the CFA examinations.

\$ HK\$3,800

D 10 hours

E Cantonese, suppl with English

衍生工具

S

課程編號：FINA9008

報名代碼：2440-1219NW

2520 4612

finsc@hkuspace.hku.hk



For details, please refer to p.059

股票及投資技術分析

S

課程編號：FINA9010

報名代碼：2435-1363NW

2520 4612

finsc@hkuspace.hku.hk



本課程旨在協助投資者掌握正確的股票投資技巧。課程內容包括：基本分析、技術分析、圖表應用實例、股票買賣的技巧、基礎期權理論、期權策略，以及如何應付牛皮市、熊市和大牛市。

\$ HK\$3,100

D 5個星期

E 粵語

See legend on page 033 圖像說明於第033頁

R Minimum Entry Requirements 基本入學要求 (P.017)

\$ Fee 學費

D Duration 修業期

E Medium of Instruction 教學語言

Q Qualifications Framework 資歷架構

E Exemption 豁免

S Short Course 短期課程

For more and latest programme information, please visit our website
有關最新課程資訊及詳情，請瀏覽學院網站 hkuspace.hku.hk

八字五行易卦風水論金融投資運勢

課程編號：FINA9288



報名代碼：2435-1584NW



2520 4612

finsc@hkuspace.hku.hk

本課程旨在介紹八字，五行，易卦，風水一同牽引金融投資運勢。透過八字風水與投資金融概念混合，讓同學可以從新的角度掌握投資技巧！

HK\$3,000

5 個星期

粵語

中小企財務管理

課程編號：FINA9332



報名代碼：2435-1587NW



2520 4612

finsc@hkuspace.hku.hk

本課程為30小時短期課程，旨在教授學員認識中小企公司財務管理的知識，應用財務分析的方法，決定投資、借貸方向，讓公司不斷成長。此外，講者將分享財務管理實務，以訂立平衡的財務策略。

HK\$6,000

5 個星期

粵語

外匯投資攻略

課程編號：FINA9320



報名代碼：2440-1226NW



2520 4612

finsc@hkuspace.hku.hk

本課程結合經濟數據分析、技術分析以及風險管理，協助對外匯投資有興趣的人士了解匯市結構和操作。龐大的資金流動性、高度靈活性、以及24小時全天候運作，使外匯市場成為全球交易量最高的金融工具。

HK\$2,900

5 個星期

粵語

全球經濟數據解讀

課程編號：FINA9294



報名代碼：2435-1374NW



2520 4612

finsc@hkuspace.hku.hk

For details, please refer to p.059

香港統計在商業上的應用

課程編號：FINA9011



報名代碼：2445-2407NW



2520 4612

finsc@hkuspace.hku.hk

For details, please refer to p.059

如何閱讀財務報表

課程編號：ACCT9075



報名代碼：2435-1372NW



2520 4612

finsc@hkuspace.hku.hk

本課程旨在教授閱讀及分析財務報表，讓學員認識及瞭解基本財務概念和公司財務狀況。課程內容包括：會計報表基本準則及基本法規；公司盈利分析及預測，以及引用市場實例以作解釋。

HK\$3,000

5 個星期

粵語

如何閱讀財務報表進階班

課程編號：ACCT9222



報名代碼：2445-3206NW

2520 4612

finsc@hkuspace.hku.hk

「如何閱讀財務報表進階班」課程旨在深入理解財務報表，課程將會使用財務報表作案例研究，並會教授資產、負債、權益、收入、費用等概念，如何為個體公司和集團企業編制通用的財務報告。此外，課程也涵蓋特定課題：納稅的影響，需披露的資料，資產重估，應用程序和財務報表的分析。

HK\$3,000

5 個星期

粵語

投資管理

課程編號：FINA9009



報名代碼：2390-1519NW



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此為一精要而實用之投資課程，內容豐富實用，旨在協助投資人士掌握股票投資技巧及認識各種股票市場的衍生工具，運用期權對沖風險，現金流的運用技巧去控制投資風險，有助投資者尋找入市良機。

HK\$2,900

5 個星期

粵語

西方數字學論經濟金融投資運勢

課程編號：FINA9322



報名代碼：2440-1110NW



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本課程旨在認識生命能量數字學的分析方法，了解個人的性格及心理特質，營造良好的個人發揮方向和團體合作方案及提升工作效率成果，應用數字的力量在經濟、金融、投資及管理的商業範疇，從而令財富有所提升。

HK\$2,800

2 個星期

粵語

投資風險管理

課程編號：FINA9012



報名代碼：2440-1116NW



2520 4612

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本課程旨在協助投資者掌握風險管理知識及技術，並配合策略加以運用。初次介紹：1. 什麼是風險 2. 如何量化風險 3. 套期保值的概念 4. 交易所買賣基金，5. VIX "恐慌指數產品"。減低投資風險，增加投資回報。

HK\$2,900

5 個星期

粵語

NCR1

This is an exempted course under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，本課程屬獲豁免課程。

NCR2

These are exempted courses under the Non-Local Higher and Professional Education (Regulation) Ordinance. 根據《非本地高等及專業教育(規管)條例》，這些課程屬獲豁免課程。

NCR3

The course operator is applying for exemption under the Non-local Higher and Professional Education (Regulation) Ordinance. 課程主辦人正根據《非本地高等及專業教育(規管)條例》辦理豁免註冊手續。

It is a matter of discretion for individual employers to recognize any qualification to which this course may lead. 個別僱主可酌情決定是否承認本課程可令學員獲取的任何資格。