

《 金融专业英语 》本科课程教学大纲

一、课程基本信息

课程名称	(中文) 金融专业英语				
	(英文) Financial English				
课程代码	2060322	课程学分		2	
课程学时	32	理论学时	32	实践学时	0
开课学院	商学院	适用专业与年级		经济金融类专业三年级	
课程类别与性质	双语	考核方式		考试	
选用教材	金融英语, 杨静宽、施箐 徐璐等编著, 清华大学出版社, 2024年8月第二版			是否为马工程教材	否
先修课程	大学英语				
课程简介	<p>Under the conditions of global economic integration and modern market economy, this course integrates three main parts: financial English market, financial institutions and operations, and financial correspondence and telecommunications. It covers international money market, capital market and foreign exchange market, commercial banks, investment banks and insurance companies, and modern silver. Business correspondence, telecommunications, etc.。</p> <p>Finance is the core of market economy. Financial activities need orderly communication and operation, especially in financial English. At the same time, we should have the basic theory, professional knowledge and operation process of finance. This course is based on finance theory. Each unit is organized around a specific financial topic, supplemented by text exercises and case introduction, to enhance students' knowledge of financial English.</p>				
选课建议与学习要求	<p>This course is suitable for the third or fourth academic year of the major of international economy and trade, business administration and financial engineering. It is based on the study of Finance and other courses. It focuses on the financial markets and focuses on discussing the contents, regulations and scenarios of the financial markets, so that students can learn to use financial English skillfully. Regulations regulate financial activities. Financial English curriculum is deepened and concretized under the internationalization of finance. It is independent and has application and knowledge links with other courses. All kinds of financial English terminology interpretation and terminology are the ultimate goal of learning, so that students can master all kinds of international financial scenarios, and can communicate openly to achieve the mother. Therefore, in terms of term arrangement, we should arrange to open after these courses as far as possible in order to fully understand all financial professional English</p>				

大纲编写人	包亚军 (签名)	制/修订时间	2025.2
专业负责人	书峰 (签名)	审定时间	2025.2
学院负责人	尹卫华 (签名)	批准时间	2025.2

二、课程目标与毕业要求

(一) 课程目标

类型	序号	内容
知识目标	1	Can correctly use financial English to provide customers or companies with complete financial investment and financial information and document writing.
	2	Systematically grasp the basic communication skills and financial etiquette of financial English, so as to further have the ability of cooperation and consensus in international competition
技能目标	3	Can correctly use financial English to analysis investment opportunities, can us write format to explain financial views.
素养目标 (含课程思政目标)	4	培养学生爱党爱国、诚信尽责。培养学生为人诚实，信守承诺，勤奋努力，精益求精，勇于担责。

(二) 课程支撑的毕业要求

<p>L01 品德修养: 拥护中国共产党的领导，坚定理想信念，自觉涵养和积极弘扬社会主义核心价值观，增强政治认同、厚植家国情怀、遵守法律法规、传承雷锋精神，践行“感恩、回报、爱心、责任”八字校训，积极服务他人、服务社会、诚信尽责、爱岗敬业。</p> <p>①爱党爱国，坚决拥护党的领导，热爱祖国的大好河山、悠久历史、灿烂文化，自觉维护民族利益和国家尊严。</p> <p>④诚信尽责，为人诚实，信守承诺，勤奋努力，精益求精，勇于担责</p>
<p>L02 专业能力: 具有人文科学素养，具备从事金融工程师、金融分析师、金融风险管理师工作的理论知识、实践能力。</p> <p>③投资分析能力：掌握股票、债券、外汇以及金融衍生品的定价规则和交易策略，熟悉各金融产品的行情变化，了解国际国内经济发展的变动趋势和调整方向，并能对市场行情进行预测。</p>
<p>L08 国际视野: 具有基本的外语表达沟通能力与跨文化理解能力，有国际竞争与合作的意识。</p> <p>①具备外语表达沟通能力，达到本专业的要求。</p>

(三) 毕业要求与课程目标的关系

毕业要求	指标点	支撑度	课程目标	对指标点的贡献度
LO1	①\④	H\M	爱党爱国，坚决拥护党的领导，热爱祖国的大好河山、悠久历史、灿烂文化，自觉维护民族利益和国家尊严。	50%
			诚信尽责，为人诚实，信守承诺，勤奋努力，精益求精，勇于担责。	50%
LO2	③	H	掌握金融英语的股票、债券、外汇以及金融衍生品的定价规则和交易策略，熟悉各金融产品的英文行情变化，用英文了解国际国内经济发展的变动趋势和调整方向，并能用英文对市场行情进行预测。	100%
LO8	①	H	具备金融外语表达沟通能力，达到本专业的要求。	100%

三、课程内容与教学设计

(一) 各教学单元预期学习成果与教学内容

<p>Unit one Money and Interest</p> <p>How money is created</p> <p>Principal and Interest concept</p> <p>Knowledge requirement:</p> <p>① What is Money, what is P&I, what will it become finance.。</p> <p>② ROI, Equity, Principle, service,</p> <p>Capability requirement:</p> <p>Control minimum word to negotiate in English.</p> <p>Teaching focus:</p> <p>Correct Student pronunciation and the way to build up sentence.</p>	class hour 2
<p>Unit two Foreigner exchange rates and markets</p> <p>Foreigner exchange and foreigner exchange rate</p> <p>The Purchasing Power Parity (PPP) theory</p> <p>The Portfolio Balance theory</p> <p>Fixed versus floating exchange rates</p> <p>Knowledge requirement:</p> <p>① What is Foreigner Exchange rate, what is foreigner exchange rate market.</p>	class hour 2

② Cross rate, direct rate calculation,

Capability requirement:

Control minimum word to negotiate in English.

Teaching focus:

Correct Student pronunciation and the way to build up sentence.

Unit Three An overview of financial markets class hour 2

What are financial market

Importance of financial markets

Money market versus capital market

Debt market versus equity market

Primary market versus secondary market

Derivative markets

Knowledge requirement:

① What is financial market, financial services, capital market. .

② IMF, WB, WDB. . .

Capability requirement:

Control minimum word to negotiate in English.

Teaching focus:

Correct Student pronunciation and the way to build up sentence.

Unit four Money market class hour 2

What the money market does

Key borrowers and lenders in money market

Money market Maturities

Depth and Breadth of the Money market

Knowledge requirement:

① What is Money market account, what is monetary service. .

② Maturity rate, term, forward, spot, borrower, lenders.

Capability requirement:

Control minimum word to negotiate in English.

Teaching focus:

Correct Student pronunciation and the way to build up sentence.

Unit five Capital Market class hour 2

The primary and secondary market

Participant: broker and dealer

The securities wholesaling and underwriting process

The Over-the-counter Market (OTC)

The secondary market

Knowledge requirement:

- ① What is Capital market?.
- ② Broker, dealer, underwriting services.

Capability requirement:

Control minimum word to negotiate in English.

Teaching focus:

Correct Student pronunciation and the way to build up sentence.

Unit Six Derivative market

class hour 2

The Global Derivatives market

Definition of derivative

Uses and users of Derivative

Type of Derivatives

Knowledge requirement:

- ① What is derivative market? Definition of derivative.
- ② Define and development of derivative products and market

Capability requirement:

Control minimum word to negotiate in English.

Teaching focus:

Correct Student pronunciation and the way to build up sentence.

Unit Seven Financial Institution

class hour 2

Financial Intermediaries

Bank

Insurance companies

Mutual fund

Pension and Retirement funds

Central banks special purpose intermediaries

Regional and world organization

Knowledge requirement:

- ① What is financial institution, what is intermediaries bank.
- ② Pension, retirement fund, central bank, tier banks...

Capability requirement:

Control minimum word to negotiate in English.

Teaching focus:

Correct Student pronunciation and the way to build up sentence.

Unit eight Commercial banks

class hour 2

Commercial bank operations

Bank sources of Funds

Transaction deposits

Money market deposit

Bank capital Uses of Funds by banks Knowledge requirement: ① What is Commercial bank, operations, deposit, account type, transaction services ② Bank capital, money market fund, bank operations. Capability requirement: Control minimum word to negotiate in English. Teaching focus: Correct Student pronunciation and the way to build up sentence.	
Unit nine Investment Banking Investment banking activities Prospect of Investment banking Asset underwriting acquisition merger Retail brokerage Hedge exposure risk	class hour 2
Unit ten Financial services Services banks Financial service provider Offering mutual funds and annuities Risk management and hedging services Dealing in Securities	class hour 2
Unit 11 Loans Loans category Credit processing How to get individual loan Classification of loan risk	class hour 2
Unit 12 International settlement Instruments used in International settlement Bill of Exchange Promissory Notes Cheques Bill of Lading DD TT Remittance collection Bank Guarantee	class hour 2

Unit 13 Banking Supervision	class hour 2
Banking Risks	
Market risks	
Liquidity risks	
Operational risk	
Legal risk	
Reputation risk	
Preconditions for the Effective Supervision	
Unit 14 Basics of Insurance	class hour 2
The function of insurance	
Risk transfer the common pool equitable contributions of premiums	
Insurance market	
Basic Doctrines	
Reinsurance	
Unit 15 Basics of Accounting	class hour 2
Importance of Accounting	
General Accepted Accounting Principles (GAAP)	
Accounting Equation	

(二) 教学单元对课程目标的支撑关系

课程目标 \ 教学单元	1	2	3
第1单元 Money and Interest	√	√	√
第2单元 Foreigner exchange rates and markets	√	√	√
第3单元 An overview of financial markets	√	√	√
第4单元 Money market	√	√	√
第5单元 Capital Market	√	√	√
第6单元 Derivative market	√	√	√

第7单元 Financial Institution	√	√	√
第8单元 Commercial banks	√	√	√
第9单元 Investment Banking	√	√	√
第10单元 Financial services	√	√	√
第11单元 Loans	√	√	√

(三) 课程教学方法与学时分配

教学单元	教与学方式	考核方式	学时分配		
			理论	实践	小计
第1单元 Money and Interest	案例教学、课堂讲授	案例分析、课堂展示、课后作业	4		
第2单元 Foreigner exchange rates and markets	案例教学、课堂讲授	案例分析、课堂展示、课后作业	2		
第3单元 An overview of financial markets	案例教学、课堂讲授	案例分析、课堂展示、课后作业	2		
第4单元 Money market	案例教学、课堂讲授	案例分析、课堂展示、课后作业	2		
第5单元 Capital Market	案例教学、课堂讲授	案例分析、课堂展示、课后作业	4		
第6单元 Derivative market	案例教学、课堂讲授	案例分析、课堂展示、课后作业	4		
第7单元 Financial Institution	案例教学、课堂讲授	案例分析、课堂展示、课后作业	2		
第8单元 Commercial banks	案例教学、课堂讲授	案例分析、课堂展示、课后作业	2		
第9单元 Investment Banking	案例教学、课堂讲授	案例分析、课堂展示、课后作业	2		
第10单元 Financial services	案例教学、课堂讲授	案例分析、课堂展示、课后作业	4		
第11单元 Loans	案例教学、课堂讲授	案例分析、课堂展示、课后作业	4		
合计			32		

(四) 课内实验项目与基本要求

序号	实验项目名称	目标要求与主要内容	实验时数	实验类型
1				
2				
3				

实验类型：①演示型 ②验证型 ③设计型 ④复合型

四、课程思政教学设计

《金融英语》课程思政教学设计

一、课程目标

知识与技能目标：使学生掌握金融英语的基本理论和实务，包括外汇市场、汇率制度、国际资本流动等内容，具备分析和解决国际金融问题的能力。

过程与方法目标：培养学生的批判性思维和创新的能力，提升其综合素质，增强其在金融英语领域的竞争力。

情感与价值观目标：通过思政元素的融入，培养学生的社会责任感和全球视野，树立正确的职业道德和价值观。

二、教学方法

案例教学法：通过实际案例分析，将思政元素融入具体的金融英语问题，增强学生的理解和应用能力。

问题导向学习（PBL）：引导学生发现和解决金融英语中的实际问题，培养其分析和解决问题的能力。

互动式教学：鼓励学生积极参与课堂讨论，表达个人见解，增强课堂的互动性和参与度。

三、课程目标融合

明确课程目标，通过思政元素的融入，既要让学生掌握金融英语的基本理论和实践操作，又要培养学生的社会责任感和全球视野，树立正确的职业道德和价值观。培养他们的国家意识、社会责任感和国际竞争力。

四、考核方式

平时成绩：包括课堂参与度、小组讨论、案例分析报告等。

期末考试：综合考察学生对金融英语理论和思政元素的掌握程度。

思政元素考核：通过开放性问题或论文，考察学生对课程中思政内容的理解和应用。

五、教学效果评价

学生自评：通过问卷调查或自我反思报告，了解学生对课程思政融合的感受和建议。

教师评价：教师根据学生的课堂表现、作业完成情况和考试成绩，综合评价教学效

果。

同行评价：邀请同行教师进行课堂观摩和评价，提出改进建议。

六、持续改进

根据教学效果评价结果，不断调整和优化教学内容和方法，确保课程思政教学设计的有效性和前瞻性。同时，关注金融英语领域的最新发展和社会需求，及时更新教学内容，保持课程的活力和时代感。

五、课程考核

总评构成	占比	考核方式	课程目标			合计
			1	2	3	
1	60%	Final Closed book Examination 期末考试（闭卷）	30	40	30	100
X1	10%	Classroom Interactive Performance after-class projects 平时表现	30	30	40	100
X2	10%	PPT preview and demonstration in class 小组展示	30	40	30	100
X3	20%	Visual Expansion, Extracurricular Reading Notes. Personal Report (Including Extracurricular Reading Materials) 课堂笔记等	30	40	30	100

评价标准细则（选填）

考	课	考核要求	评价标准
---	---	------	------

核 项 目	程 目 标		优 100-90	良 89-75	中 74-60	不及格 59-0
1						
X1						
X2						
X3						
X4						
X5						

六、其他需要说明的问题

无
