**STATEMENT OF CHANGES IN BENEFICIAL OWNERSHIP OF SECURITIES**

Filed pursuant to Section 16(a) of the Securities Exchange Act of 1934, Section 17(a) of the Public Utility Holding Company Act of 1935 or Section 30(f) of the Investment Company Act of 1940

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### 1. Name and Address of Reporting Person *

**Kaplan Steven N**

C/O MORNINGSTAR, INC., 22 WEST WASHINGTON STREET

CHICAGO, IL 60602

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### 2. Issuer Name and Ticker or Trading Symbol

**Morningstar, Inc. [ MORN ]**

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### 3. Date of Earliest Transaction (MM/DD/YYYY)

**5/15/2009**

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### 4. If Amendment, Date Original Filed (MM/DD/YYYY)

**5/15/2009**

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### 5. Relationship of Reporting Person(s) to Issuer

- **X** Director
- ___ 10% Owner
- ___ Officer (give title below)
- ___ Other (specify below)

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### Table I - Non-Derivative Securities Acquired, Disposed of, or Beneficially Owned

<table>
<thead>
<tr>
<th>Code</th>
<th>5/15/2009</th>
<th>A</th>
<th>2855</th>
<th>A</th>
<th>$0</th>
<th>73055</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title of Security</strong></td>
<td><strong>Trans. Date</strong></td>
<td><strong>Code</strong></td>
<td><strong>Amount</strong></td>
<td><strong>Price</strong></td>
<td><strong>Ownership Form</strong></td>
<td><strong>Nature of Indirect Beneficial Ownership</strong></td>
<td></td>
</tr>
<tr>
<td>Common Stock (Restricted Stock Units)</td>
<td></td>
<td>A</td>
<td>2855</td>
<td>A</td>
<td>$0</td>
<td>73055</td>
<td>D</td>
</tr>
</tbody>
</table>

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### Table II - Derivative Securities Beneficially Owned

<table>
<thead>
<tr>
<th>Code</th>
<th>5/15/2009</th>
<th>A</th>
<th>(A)</th>
<th>(D)</th>
<th>Date Exercisable</th>
<th>Expiration Date</th>
<th>Title</th>
<th>Amount or Number of Shares</th>
<th>Ownership Form of Derivative Security</th>
<th>Nature of Indirect Beneficial Ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title of Derivate Security</strong></td>
<td><strong>Conversion or Exercise Price of Derivative Security</strong></td>
<td><strong>Trans. Date</strong></td>
<td><strong>Code</strong></td>
<td><strong>Price</strong></td>
<td><strong>Date Exercisable</strong></td>
<td><strong>Expiration Date</strong></td>
<td><strong>Title</strong></td>
<td><strong>Amount or Number of Shares</strong></td>
<td><strong>Ownership Form</strong></td>
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### Explanation of Responses:

(1) Each restricted stock unit represents a contingent right to receive one share of Morningstar, Inc. common stock. The restricted stock units vest in three equal annual installments beginning May 15, 2010.

(2) The number of restricted stock units was initially over reported by 1. This filing properly reflects the correct number of restricted stock units.

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### Reporting Owners

<table>
<thead>
<tr>
<th>Reporting Owner Name / Address</th>
<th>Relationships</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Kaplan Steven N</strong></td>
<td><strong>Director</strong></td>
</tr>
<tr>
<td>C/O MORNINGSTAR, INC. 22 WEST WASHINGTON STREET</td>
<td>X</td>
</tr>
<tr>
<td>CHICAGO, IL 60602</td>
<td></td>
</tr>
</tbody>
</table>
Reminder: Report on a separate line for each class of securities beneficially owned directly or indirectly.
* If the form is filed by more than one reporting person, see Instruction 4(b)(v).
Note: File three copies of this Form, one of which must be manually signed. If space is insufficient, see Instruction 6 for procedure.
Persons who respond to the collection of information contained in this form are not required to respond unless the form displays a currently valid OMB control number.